






Icons

-  Create
-  Edit
-  Select All
-  Delete
-  Show/Hide Columns

Expenses

As you spend down against budgeted line items, that line item's partial or whole completion may be marked at any time by adding an expense record. Expenses may be added through the Expenses list, budget, or the grant's *Post-Award tab > Financial > Expenses*. Depending on your account settings, there may be additional fields or sections in a *Custom tab*. Expenses can also be included in Reporting Periods to the funder.

How To Add an Expense

Prerequisite: Must be an Organizational Admin, Department Admin, Grant Manager, Additional Staff, or Responsible Individual; Grant must allow manual entry for GL Actuals on Grant Details page

Expenses are charges spent against a planned grant budget line item. If an expense exceeds a line item's spending alert, the Grant Manager will receive an email notification. If an expense exceeds a line item's expense cap, it cannot be added. Expenses can also be imported in *Administration > Actuals > Expenses*.

For more information on expenses, see the [AmpliFund Activity Management Guide](#) or AmpliFund Administration Guide.

1. Open **Activity > Expenses**.
2. Click the **+** (**Create Expense icon**) under *Actions*.



3. In the pop-up window, select a **Grant**.
4. Select a **Category**.
5. Select a **Line Item**.
6. Add the **Direct Cost** or **Salary amount**.
7. Check the **Exclude From Match** checkbox if necessary.
8. Select an **Expense Date**.
9. Select the **Expense Status**.
 - **New:** A new expense
 - **Matched:** The expense has been added manually and imported
 - **Reviewed:** The expense has been reviewed
 - **Payment Requested:** The expense has been invoiced to the funder
 - **Paid:** The expense has been paid by the funder
 - **Denied:** The expense has been denied by the funder
10. Select **Payee type** and **Payee**, or **Create New payee** and add **Payee**

Note: For the expense to be brought into the funding request, it must be marked as "Reviewed." If you want to enter expenses but not submit for reimbursement yet, they can be marked as "New."

name. The payee is the entity that received the expense funds in exchange for services or goods.

11. Add a **Description** (optional).
12. Click **Save**.

How To Add Indirect Expenses

Prerequisite: Must be an Organizational Admin, Department Admin, Grant Manager, Additional Staff, or Responsible Individual; Grant must allow manual entry for GL Actuals on Grant Details page

Note

If indirect expenses are system generated, they will appear automatically when an expense is added against a line item that generates indirect.

Indirect expenses are charges spent against a grant's planned indirect cost. If an expense exceeds a line item's spending alert, the Grant Manager will receive an email notification. Indirect expenses can also be imported in *Administration > Actuals > Expenses*, or system-generated.

For more information on expenses, see the [AmpliFund Activity Management Guide](#) or [AmpliFund Administration Guide](#).

1. Open **Grant Management > Grants > All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab > Financial > Budget**.
4. Click the **\$ (Expenses icon)** next to the Indirect Cost line item.



5. Click the **+ (Create icon)** under *Actions*.



6. Add the **Direct Cost** amount.
7. Check the **Exclude From Match checkbox** if necessary.
8. Select an **Expense Date**.
9. Select the **Expense Status**.
 - **New:** A new expense
 - **Matched:** The expense has been added both manually and imported, a possible duplicate
 - **Reviewed:** The expense has been reviewed
 - **Payment Requested:** The expense has been invoiced to the funder
 - **Paid:** The expense has been paid by the funder
 - **Denied:** The expense has been denied by the funder
10. Add a **Description** (optional).
11. Click **Save**.

How To Mark an Expense as Reviewed

Expenses may be marked as reviewed by Responsible Individuals, Grant Managers, and Organizational Administrators. This will change the expense status to Reviewed.

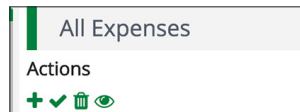
1. Open **Activity>Expenses**.

Filter By

2. Select a **Time Frame** to view.
3. Select a **Grant, Category, and/or Line Item** to view (optional).
4. Click **Run**.

All Expenses

5. Check the **checkbox** to the left of an expense.
6. Click the **✓ (Mark as Reviewed icon)** below *Actions*.



7. In the confirmation pop-up window, click **Complete**.