

Advance Payment Request - Summary Guide



Advance Payment Requests are only used when expenses HAVE NOT been incurred. Check your program specific guidelines to determine whether advances are allowed.

Do NOT enter expenses before your Advance Payment Request.

I. Generating a Payment Request

- a. Grants Management (left navigation) > Grants > [Select Grant]
- b. Post-Award (tab at top) > Cash Flow > Payment Request > **+ Plus Icon** (top right)
 1. Enter: Payment Request Name, Date Created
 2. Related Reporting Period(s): **Leave Blank**
 3. Expenses From/To: **Leave Blank (Do Not Enter Any Dates. Delete if accidentally entered.)**
 4. Payment Type: Advance
 5. Projected Expenses: Enter 0 unless your Program Guidelines requires this estimate at this time.
 6. Match Contribution: Enter 0 unless your Program Guidelines requires this estimate at this time.
 7. Enter 'Requested Amount' (Grant Funds Requesting in this Advance)
 8. Add optional comments or upload files (uploads-not applicable to all programs).
 9. Click **Submit** to send completed Payment Request to Program Rep.

The screenshot shows the 'Payment Request Information' and 'Financial Detail' sections of the AmpliFund interface. Red annotations highlight specific fields and values:

- A red bracket labeled '1' groups the 'Payment Request Name *' (value: Payment Request 1) and 'Date Created *' (value: 11/1/2023) fields.
- A red bracket labeled '2 & 3' groups the 'Related Reporting Period(s)' (value: Select reporting periods...), 'Expenses From' (blank), and 'Expenses To' (blank) fields, with a note: 'All Fields are Blank'.
- A red '4' is placed next to the 'Payment Type' dropdown menu (value: Advance).
- A red '7 Grant Funds Requested' is placed next to the 'Requested Amount*' field (value: \$5,000.00).

| Payment Request Information | |
|-----------------------------|-----------------------------|
| Payment Request Name * | Payment Request 1 |
| Date Created * | 11/1/2023 |
| Related Reporting Period(s) | Select reporting periods... |
| Expenses From | |
| To | |
| Payment Type | Advance |
| Payment Request Status | Not Submitted |

| Financial Detail | |
|-------------------------|------------|
| Projected Expenses | \$0.00 |
| Match Contribution | \$0.00 |
| Net Total | \$0.00 |
| Requested Amount* | \$5,000.00 |
| Remaining Grant Balance | \$9,900.00 |