COLORADO JUDICIAL DEPARTMENT
USING AMPLIFUND

CREATE EXPENSES AND PAYMENT REQUESTS

This document provides step by step instructions on how to create expenses and payment requests.

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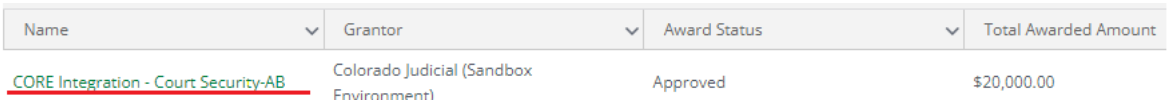
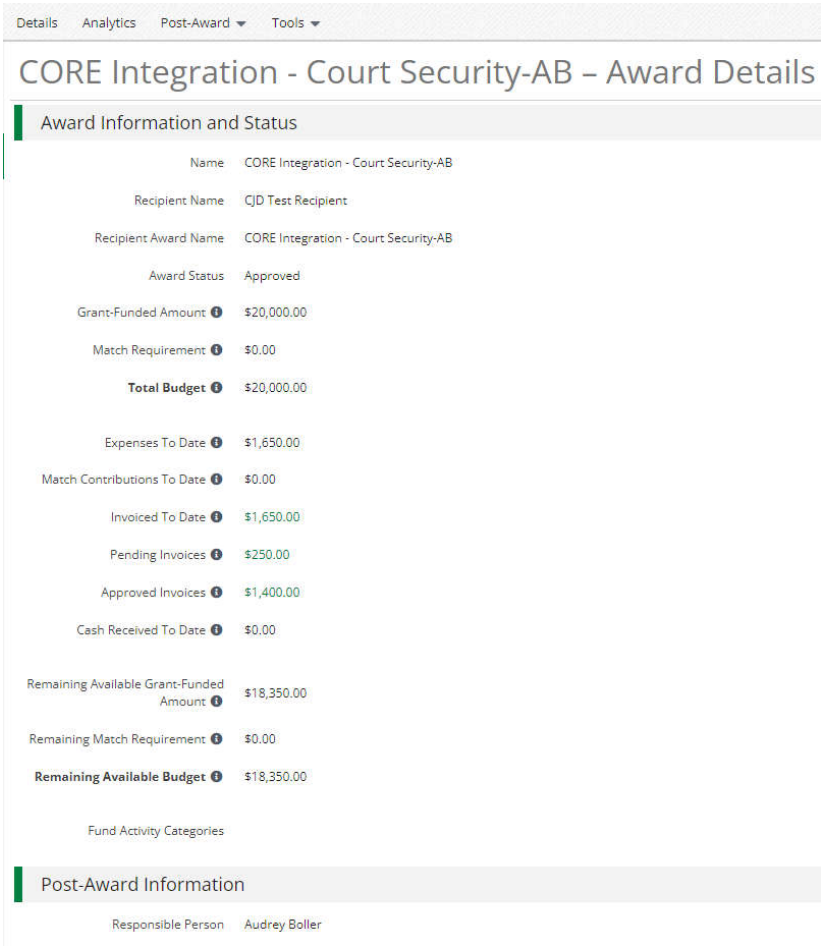
CREATE EXPENSES

Navigate to the **Grant Management -> Grants**

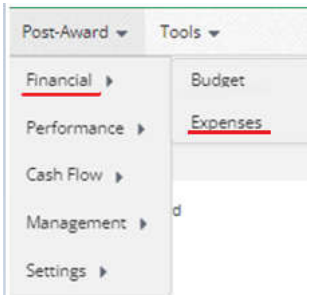
Select your Award by clicking it in the **Name** column



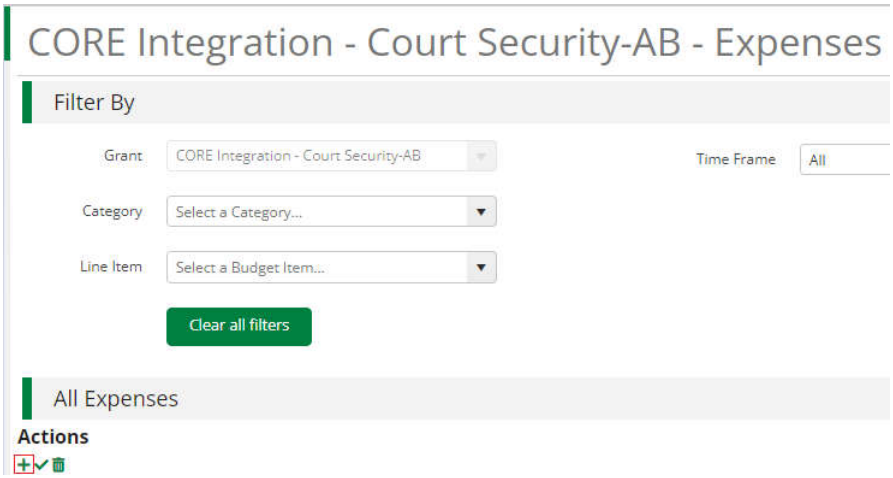
The **Award Screen** will display



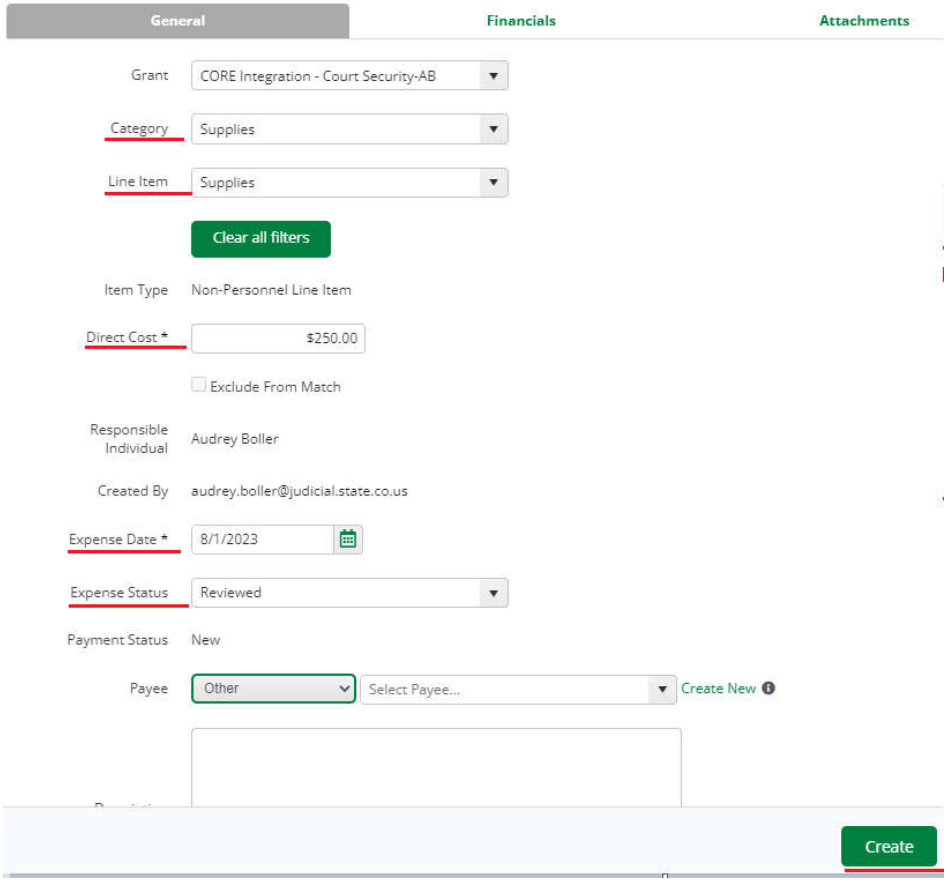
From the **Post-Award** tab on the top of the screen, select **Expenses** from the side dropdown



From the next screen, click the **+** below **Actions** in the **All Expenses** section



From the **Expense Entry Screen**, enter the values as indicated below



Category - Select the relevant Budget Category from dropdown

Line Item – Select the relevant Budget Line Item from dropdown

Direct Cost – Enter the amount you are requesting

Expense Status – Select **Reviewed**

The Reviewed status makes Expenses eligible to be pulled into a Payment Request

- *Will a different person in your organization be reviewing the expense you have entered? If so, leave the Expense Status as **New** and have that person follow the instructions under the Review Expenses section*

Expense Date – Enter the date of the expense

- *If you are entering the entire amount for a quarter in one line, you can use the last date of the quarter (or any other date within that quarter)*

  For example: if you are entering $25,000 for the quarter 7/1/2023-9/30/2023, you can enter 9/30/2023

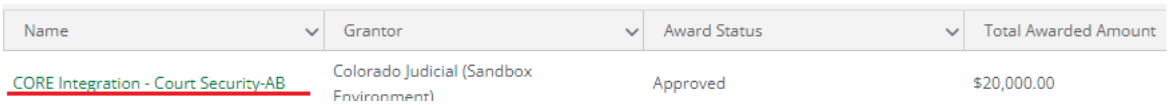
Click **Create**

Repeat all steps above for each expense line item you would like to add

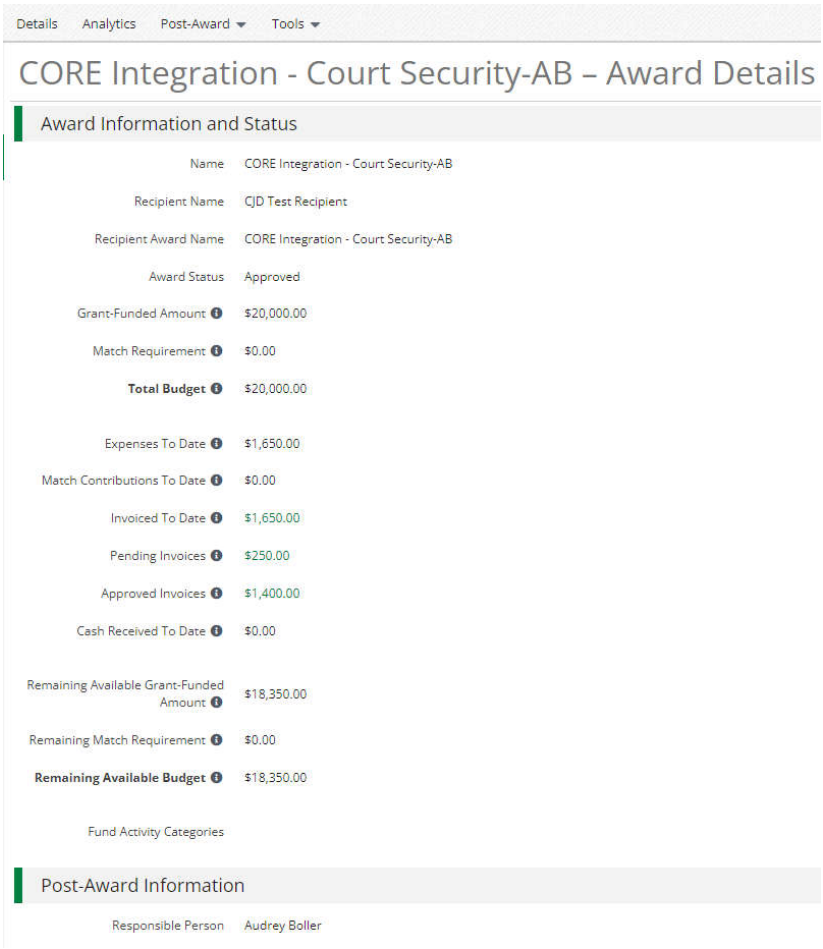
REVIEW EXPENSES (IF EXPENSES ENTERED BY DIFFERENT PERSON THAN REVIEWER)

Navigate to **Grant Management -> Grants**

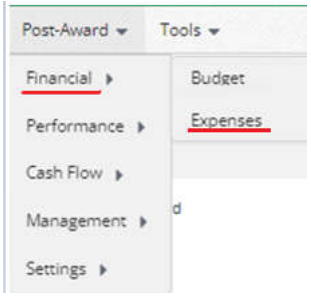
Select your Award by clicking it in the **Name** column



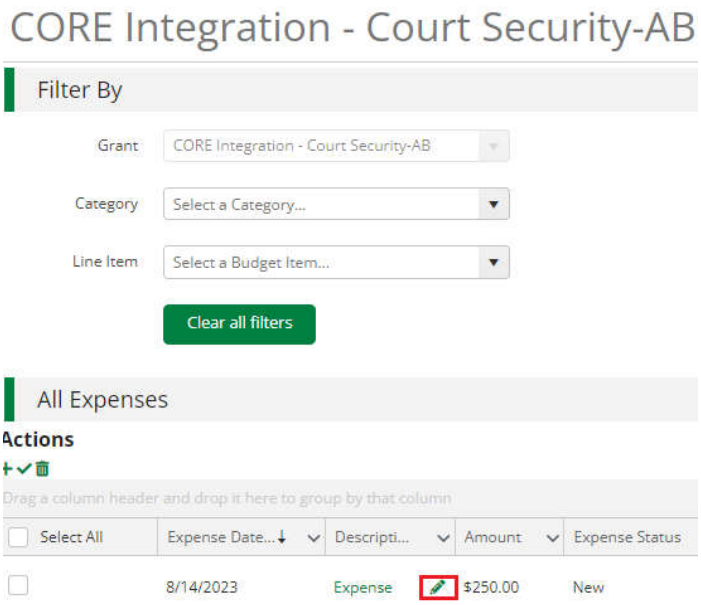
The **Award Screen** will display



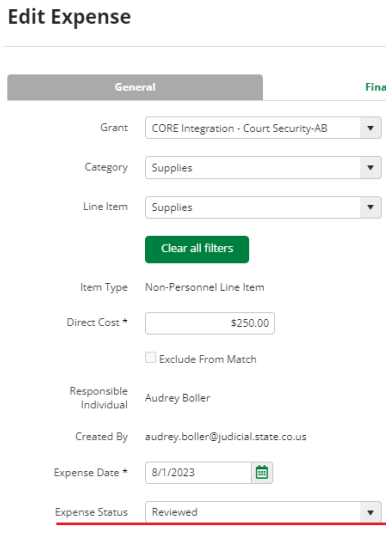
From the **Post-Award** tab on the top of the screen, select **Expenses** from the side dropdown



Within the **All Expenses - Actions** section on the next screen, from the list of expenses that have been entered, click the next to items with the **Expense Status** of **New**



On the **Edit Expense** screen, review the information that has been entered and change the **Expense Status** to **Reviewed**

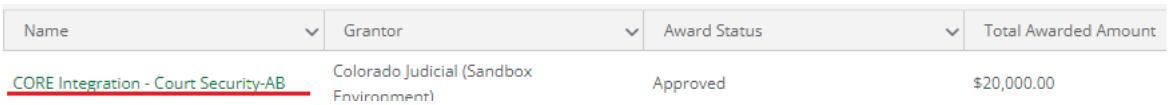


The Reviewed status makes Expenses eligible to get pulled into a Payment Request

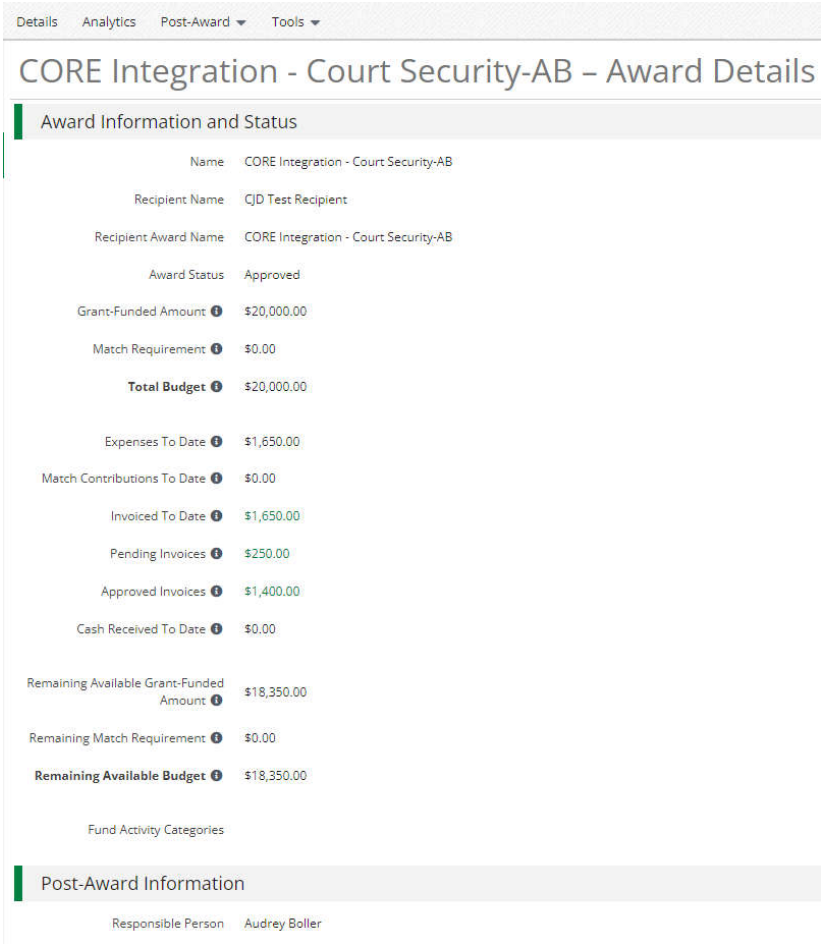
CREATE AND SUBMIT PAYMENT REQUEST

Navigate to **Grant Management -> Grants**

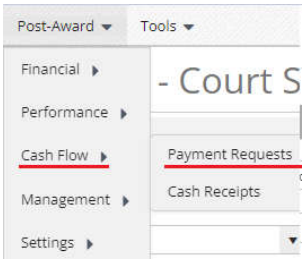
Select your Award by clicking it in the **Name** column



The **Award Details Screen** will display

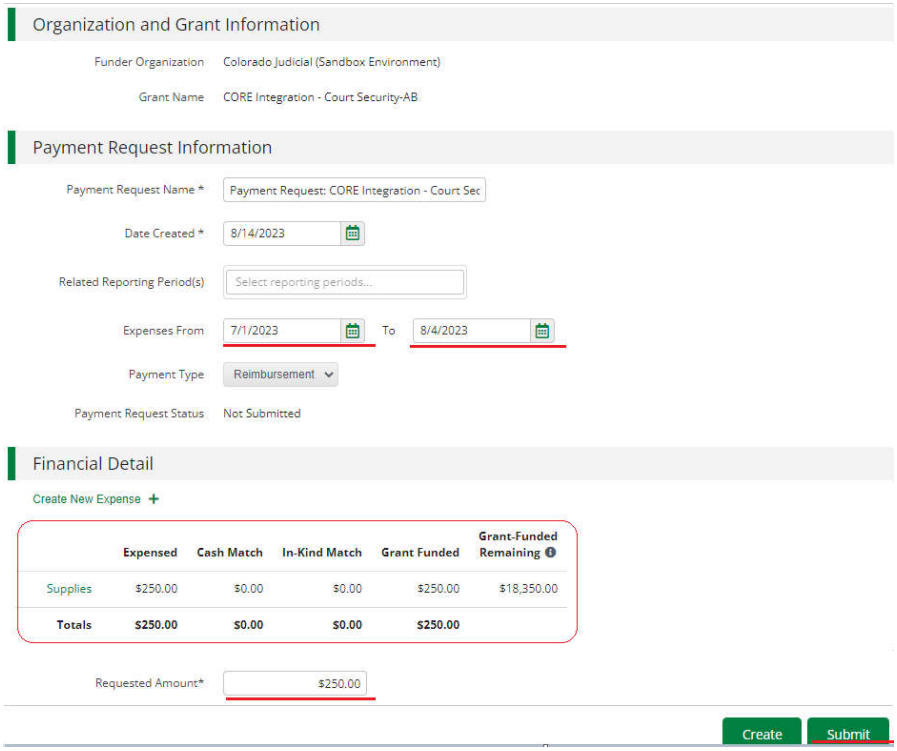


From the **Post-Award** tab on the top of the screen, select **Cash Flow > Payment Requests** from the side dropdown



On the next screen, click the **+** in the icon toolbar on the top right to create a new Payment Request

From the **Payment Request Entry Screen**, enter the values as indicated below



Payment Request Information Section

Enter the **Expenses From** and **To** dates to reflect the period of your request

For example: 7/1/2023 – 9/30/2023 for the 1st quarter of the 2023/24 grant year

Financial Details Section

As shown in the red box above, a list of all total reviewed expenses for the specified time period will display

Double-check that it matches the total you intended

*If it does not, go back to the **Expense** screen and check that all expenses have **Expense Status** = **Reviewed** and **Expense Date** within the intended time period*

Enter the **Requested Amount** to reflect the **Totals** amount in the Grant Funded column directly above

Certification Section

Review the information and enter your name to certify

Backup Requirements Section

make sure to read this carefully and provide all of the necessary backup

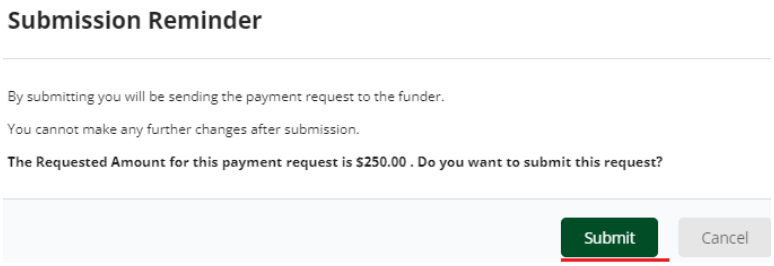
Many grants will have additional sections and fields to complete

Enter the requested information

Upload your backup

Click **Submit**

A pop-up will show to ensure that you are submitting the request for the intended amount. If it is correct, click **Submit** again



Another pop-up will display briefly that says

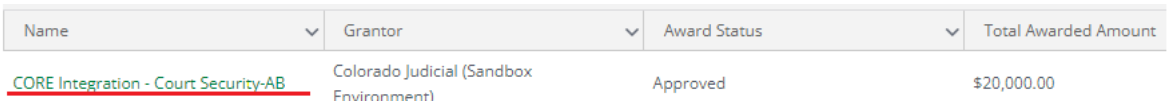
Success

Payment Request Submitted

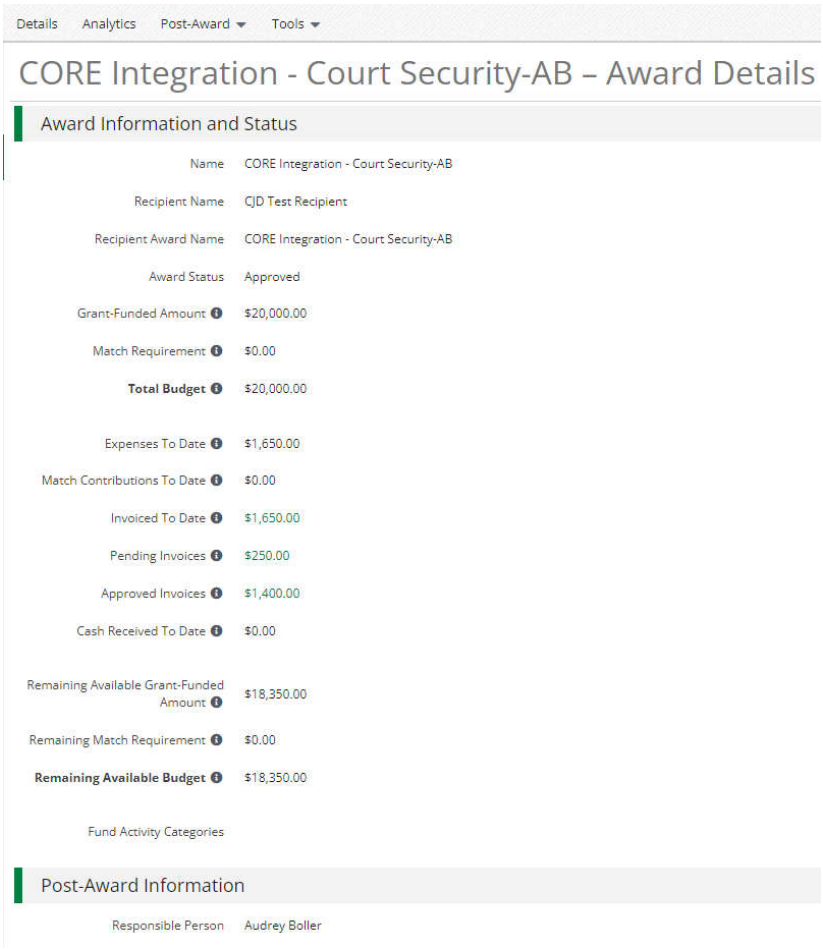
REVIEW SUBMITTED PAYMENT REQUESTS

Navigate to **Grant Management -> Grants**

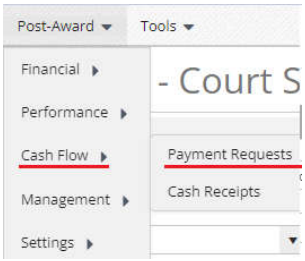
Select your Award by clicking it in the **Name** column



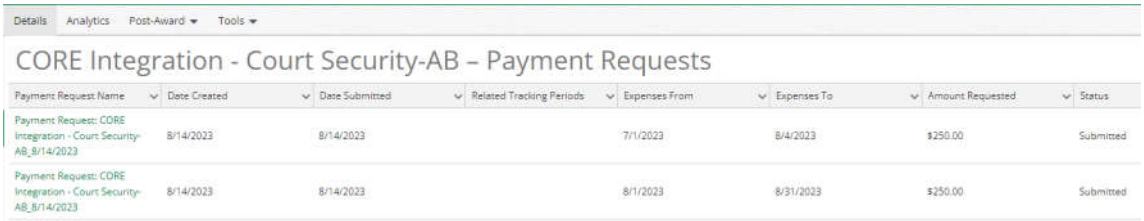
The **Award Screen** will display



From the **Post-Award** tab on the top of the screen, select **Cash Flow** from the side dropdown



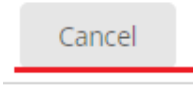
The list of **Payment Requests** will display as shown below. Look in the **Status** column. To review the details of the request, click it in the **Payment Request Name** column



On the **Payment Request Screen**, see the **Payment Request Status**

Scroll to the bottom to view the **Payment Request History** Section. You can see the actions taken on this Payment Request and who took those actions. When it has been approved for payment by the State Court Administrator's Office, that will also show.

Click **Cancel** to close

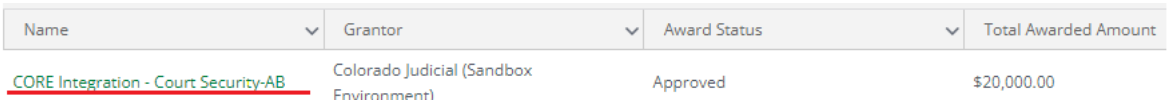


EDIT AND RESUBMIT REJECTED PAYMENT REQUEST

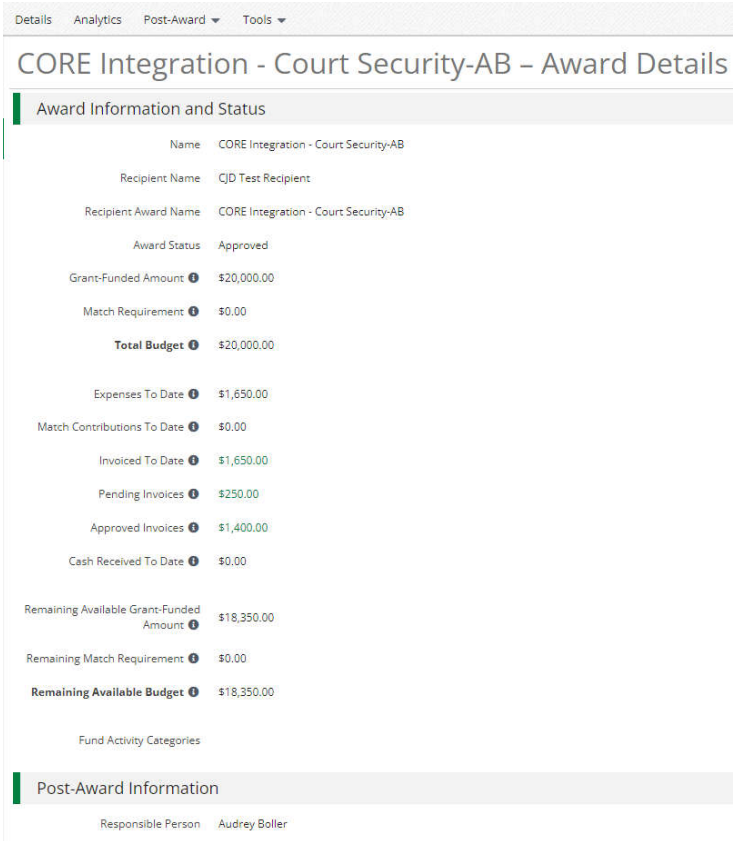
NOTE: You can only resubmit a rejected Payment Request once. If it is rejected another time, you will need to create a new Payment Request.

Navigate to **Grant Management -> Grants**

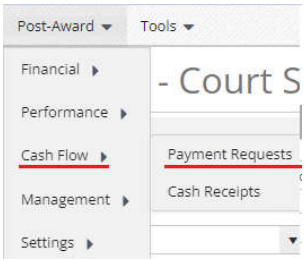
Select your Award by clicking it in the **Name** column



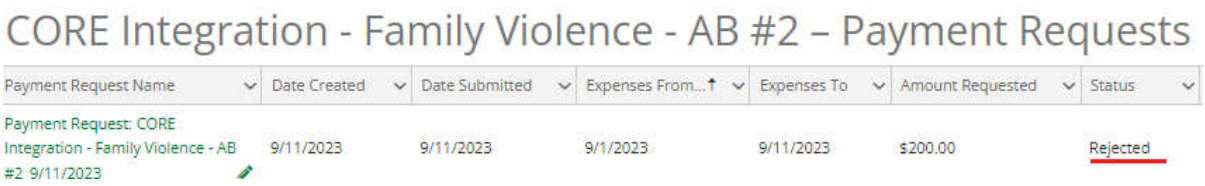
The **Award Screen** will display



From the **Post-Award** tab on the top of the screen, select **Cash Flow** from the side dropdown



The list of **Payment Requests** will display as shown below. Look in the **Status** column. If the Status is **Rejected**, edit the request by clicking it in the **Payment Request Name** column



On the **Payment Request Screen**, the **Payment Request Status** will be **Rejected**

Scroll to the bottom to view the **Payment Request History** Section and see the **Reason for Edit** on the rejected line

Based on the **Reason for Edit**, update the Payment Request as needed

Click **Submit**