AMPLIFUND PAYMENT REQUEST GUIDANCE FOR GRANTEES

VIDEOS FOR REFERENCE:

1. Accessing Grant Award Budget & Entering Expenses:
   https://il-amplifund.zendesk.com/hc/en-us/articles/4402912017811-Accessing-Grant-Award-Budget-Entering-Expenses

2. Generating a Payment Request Without a Reporting Period:
   https://il-amplifund.zendesk.com/hc/en-us/articles/4402904481427-Generating-a-Payment-Request-without-a-Reporting-Period

3. Accessing and Updating a Rejected Payment Request:
   https://il-amplifund.zendesk.com/hc/en-us/articles/4402904512019-Accessing-and-Updating-a-Rejected-Payment-Request

GENERATE EXPENSES TO CREATE A RECORD OF INVOICES

1. In the Attachments tab there is the Invoice for Disbursement Request Documentation which is required with the submission of deliverables for each Disbursement.
   a. These directions can also be found tin the Attachments tab.
2. Create expense(s) in Amplifund in the Budget. If you need a refresher, see the video above.
3. Include the Invoice for Disbursement Request with your invoices here in the Expenses. You should be able to attach more than one document to an expense that you generate.
   a. More details about how to use the Invoice for Disbursement Request below.

FIRST DISBURSEMENT

1. Download the Invoice for Disbursement Request from the Documents tab in Amplifund.
   a. Fill it out marking it as the First Disbursement and fill in half of the amount of the awarded grant. (i.e. $15,000 if the grant is a $30,000 total award)
   b. This needs to be electronically signed in Adobe Acrobat or printed, signed, and scanned back into a pdf file.
2. Gather all listed documents on the Invoice for Disbursement electronically.
   a. An executed 3rd party contract for the services to be provided with all required grant language.
   b. A copy of other funding, if applicable.

FINAL DISBURSEMENT

1. Download the Invoice for Disbursement Request from the Documents tab in Amplifund.
   a. Fill it out marking it as the Final Disbursement and fill in all appropriate boxes
      i. The Invoiced amount is the total amount needed ($30,000 or whatever all work together cost)
      ii. The Total Request Amount just above the signature line is for the amount needed to complete the grant amount (the final half of the award amount, $15,000 or less depending on the invoices for the project and award amount)
   b. This needs to be electronically signed in Adobe Acrobat or printed, signed, and scanned back into a pdf file.
2. Gather all listed documents on the Invoice for Disbursement electronically.
   a. A completed Project Plan following the Submittal Checklist for the WPC Loan Program.
   b. The completed Submittal Checklist.
   c. A completed Environmental Checklist as listed in the Submittal Checklist.

i. There should be record of at the least the beginning of submissions and/or a plan for which Environmental Sign-Offs are required to carry out the Project Plan.

ii. It is recommended that if a Grantee is planning to submit their completed Project Plan from the UCPGP to the WPCLP it is best to have the Environmental Checklist as close to complete as possible.

GENERATE A PAY REQUEST

1. In the award details, click on Post Award→ Cash Flow→Payment Requests and proceed to fill out the required fields.
2. Once the total requested amount is filled in there is the comment box and the ability to attach required documents. Include all applicable deliverables as attachments on the Payment Request. If you did not include the Invoice for Disbursement while generating the Expense(s) attach it here with the other outlined deliverables.
    a. If you did attach the Invoice for Disbursement with the Expense(s) please write this in the comment box.
3. Either Create the Payment Request so that you can come back and edit or continue to Submit the Payment Request, but you will no longer be able to edit.
4. If there is something missing or that needs corrected or edited with the submitted Payment Request the Assigned PM will Reject the Request and the Grant Manager for the Community should receive a notification. The process is outlined in the video above. If you have any questions about the PM comments and how to fix the Payment Request you can email them directly, but all corrections should be submitted in Amplifund.