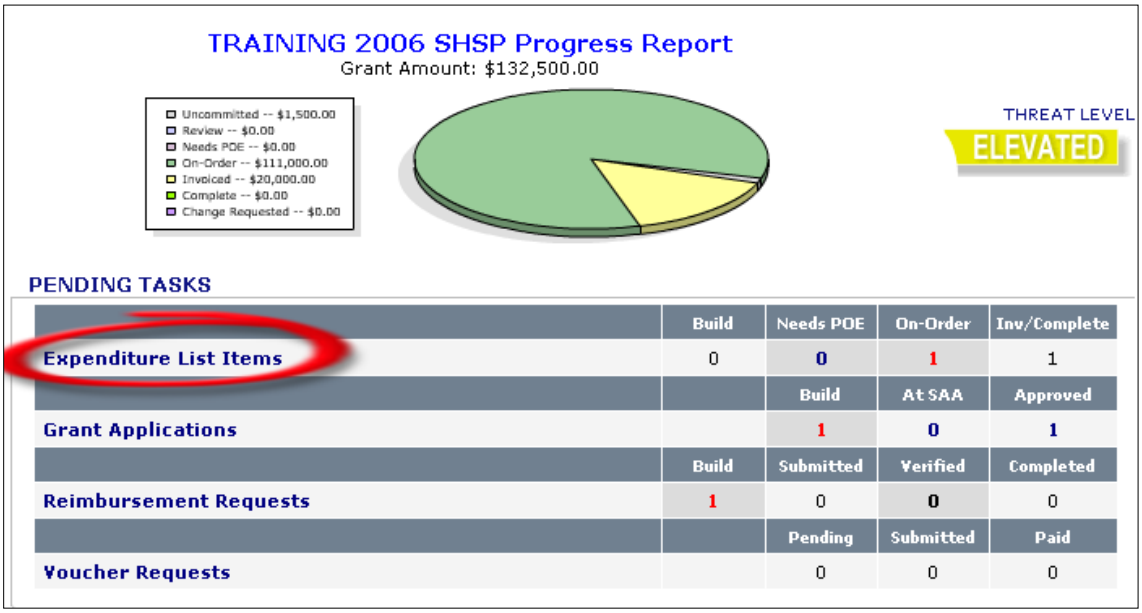
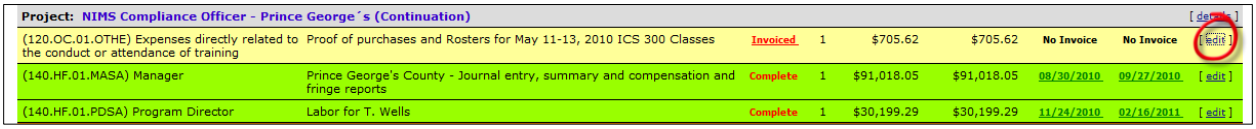
Adjust the Expenditure Amount

The subgrantee may adjust the expenditure item amount in the Needs Invoice or Invoiced status without submitting a change request. This slick sheet serves to provide instruction on how to complete this process.

Step 1 | From the Home screen, click the **Expenditure List Items** hyperlink under the Pending Tasks section.

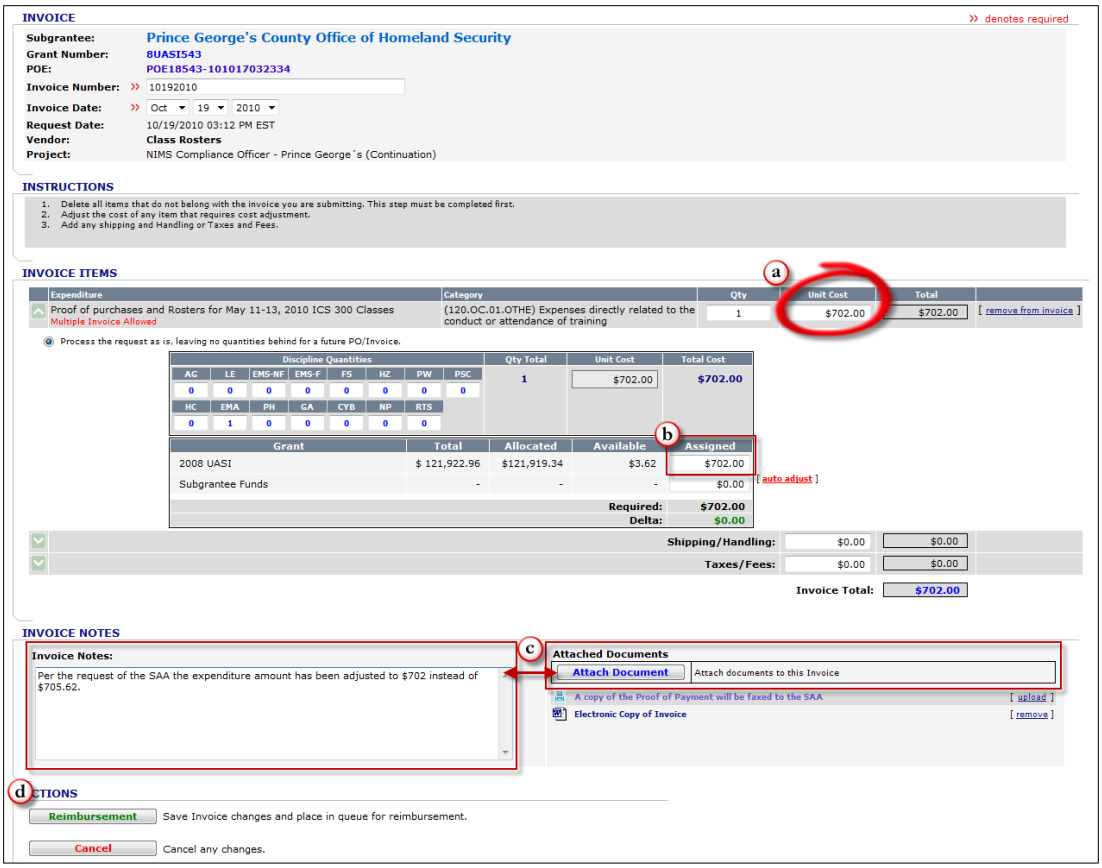


Step 2 | When the expenditure status is Needs Invoice or Invoiced status, click the [edit] hyperlink to the right of the expenditure item. *Quick note: Needs Invoice is when an item has not been submitted to the SAA. Invoiced is when the request was submitted but denied by the SAA.*

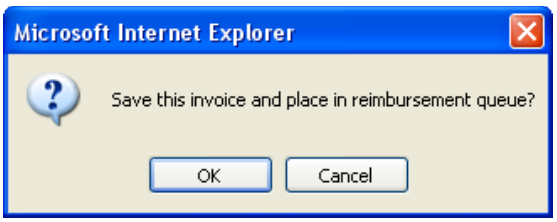


Step 3 | On the Invoice – Invoice Items screen, update the expenditure amount by taking the following steps:

a. To change the expenditure amount from $705.62 to $702, enter the new amount in the **Unit Cost** field.
b. Ensure the amount **Assigned** equals the total for the request and utilizes only grant funds. If this is not the case, click the [auto adjust] hyperlink.
c. Attach any **Additional Documents** that support/explain the expenditure request or provide details in the **Subgrantee Notes** section. *Tip: make sure the attached documents are accurate and reflect the revised amount. You can attach new or remove current documents before submitting the request to the SAA.*
d. Click the **Reimbursement** button in the Actions section to save changes to your invoice and place it in queue for reimbursement.



Step 4 | A pop-up prompt will confirm the submission of the item. Click **OK**.



Step 5 | On the Reimbursement – Reimbursement items screen, click the **Submit** button in the Actions section to send the invoice to the SAA for review.

This request will display in the SAA's queue for approval. The subgrantee can be notified via email if the request is denied. If approved, the request will move through the SAA's approval process.