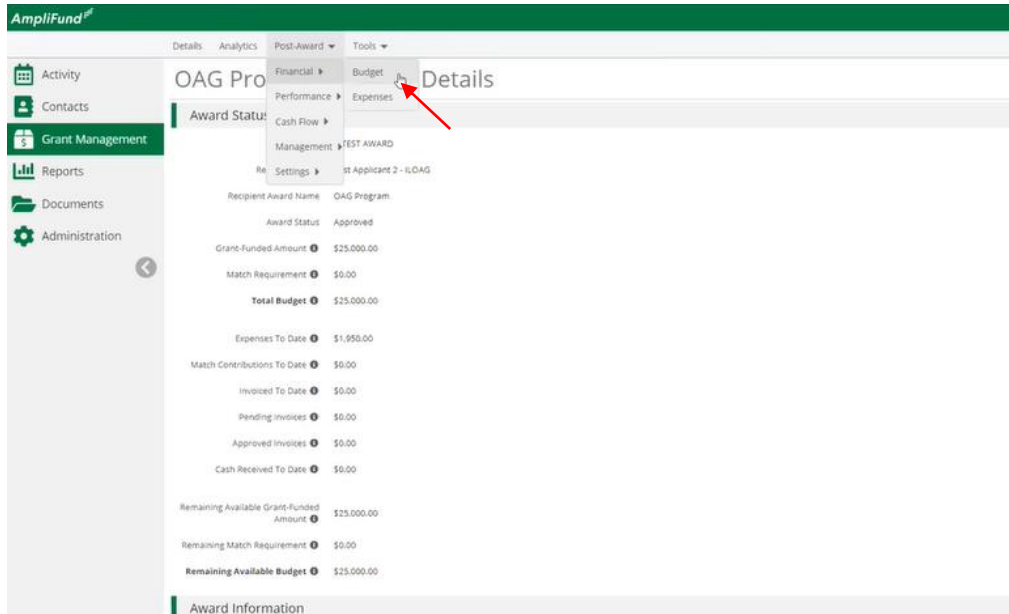# Creating an Expense

Click on Post Award, Financial, Budget:
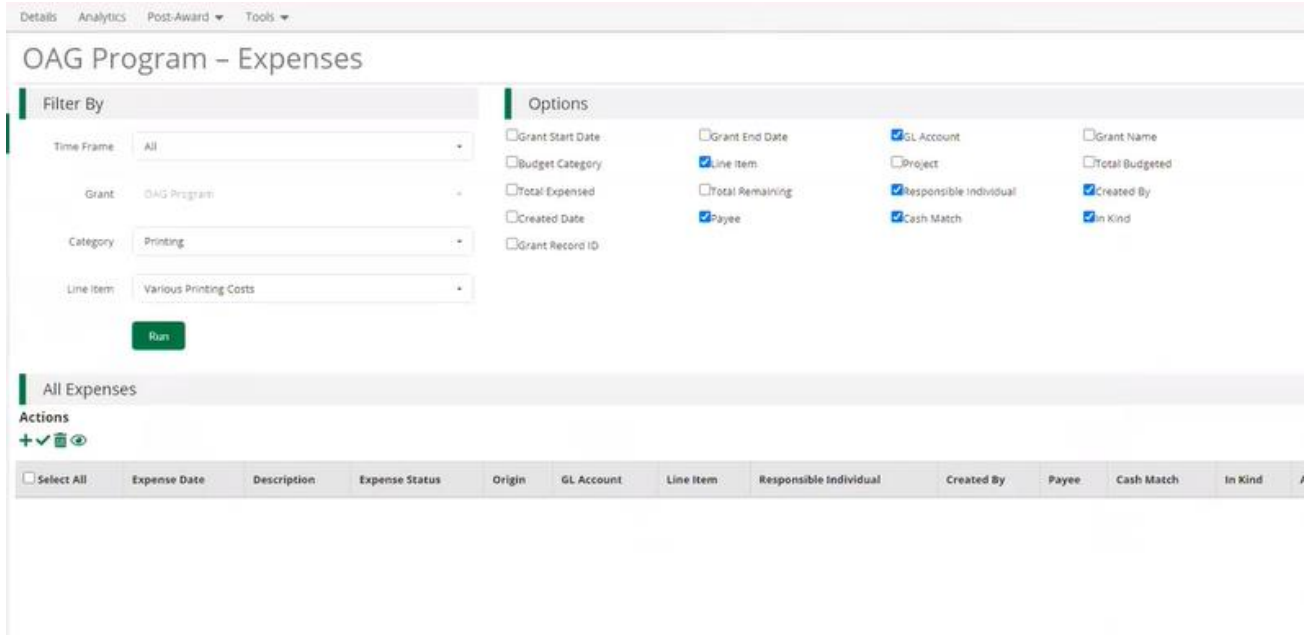

Click on the Line Item that you will be entering the expense in. In this example, we are adding an expense in Printing.
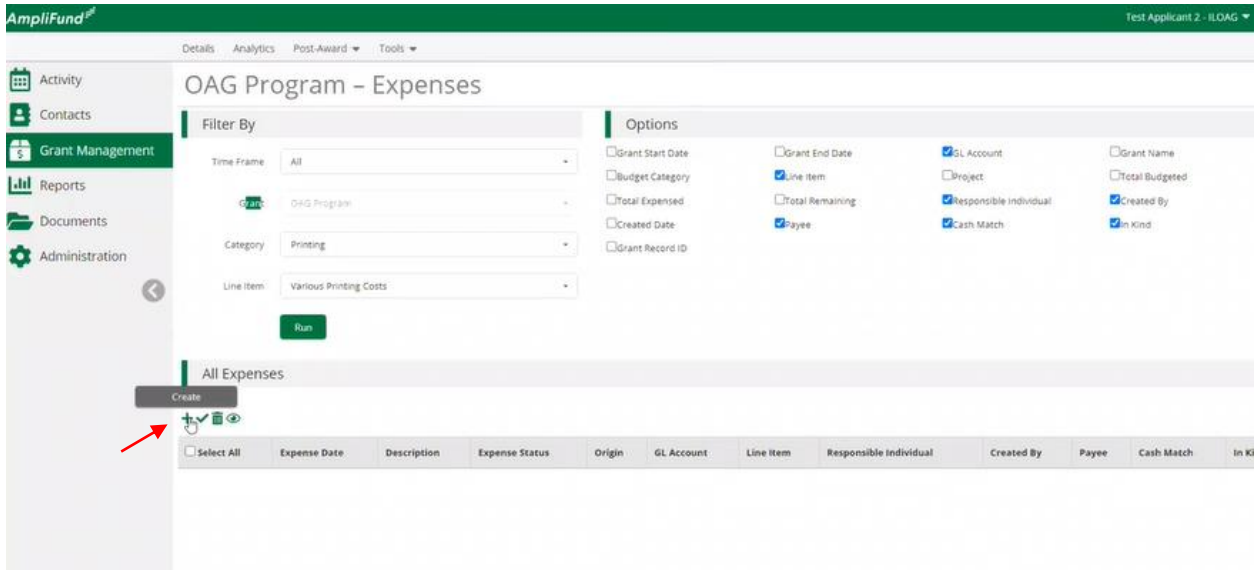
Click on the $ icon:

You will see the following screen:

Add your expense by clicking the + icon:

Enter the direct cost of the line item:

Enter when the expense was incurred: You may use the last date of the quarter.

Change the status to Reviewed:

Add any attachments within the attachment section on this screen. For example, you may want to add a receipt for a printing expense incurred. If you are entering salary, you would attach the timesheets.

Click Create:

You will do this for each expense you have within the quarter.

How to Create Achievements in the Performance Plan

Performance Plan

Click on Post Award, Performance, Performance Plan
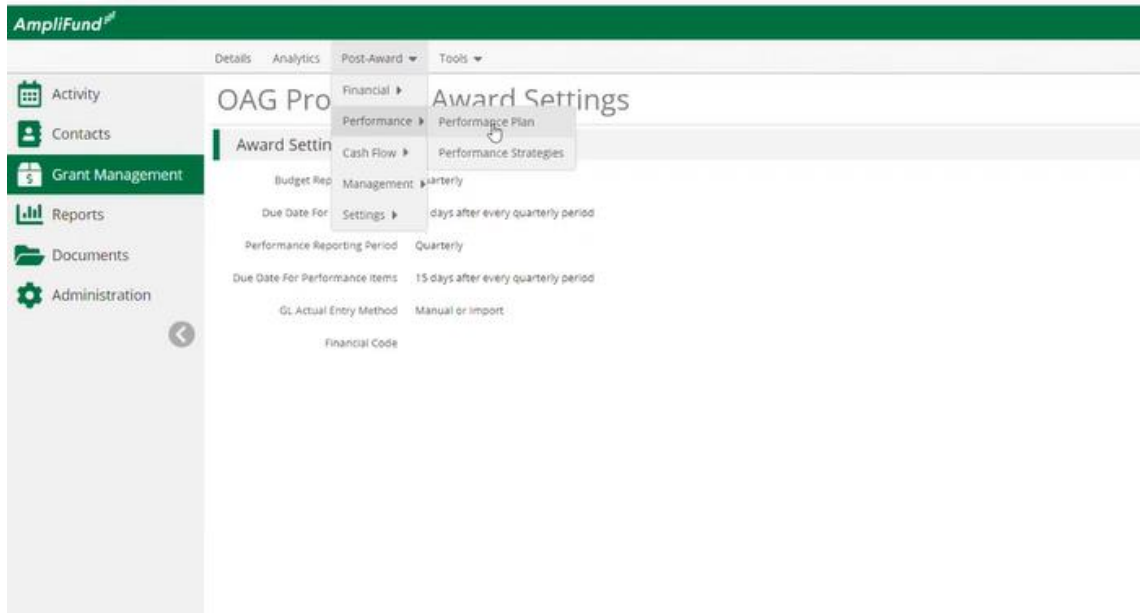
Performance Plan:

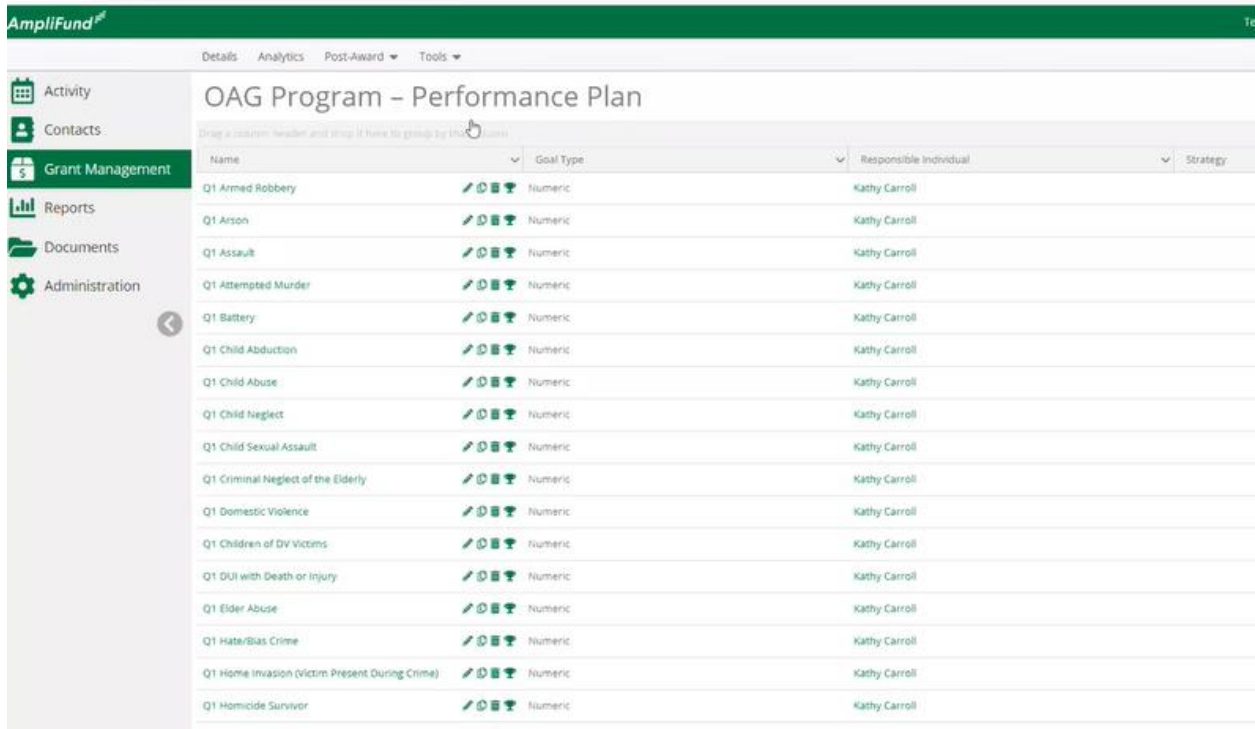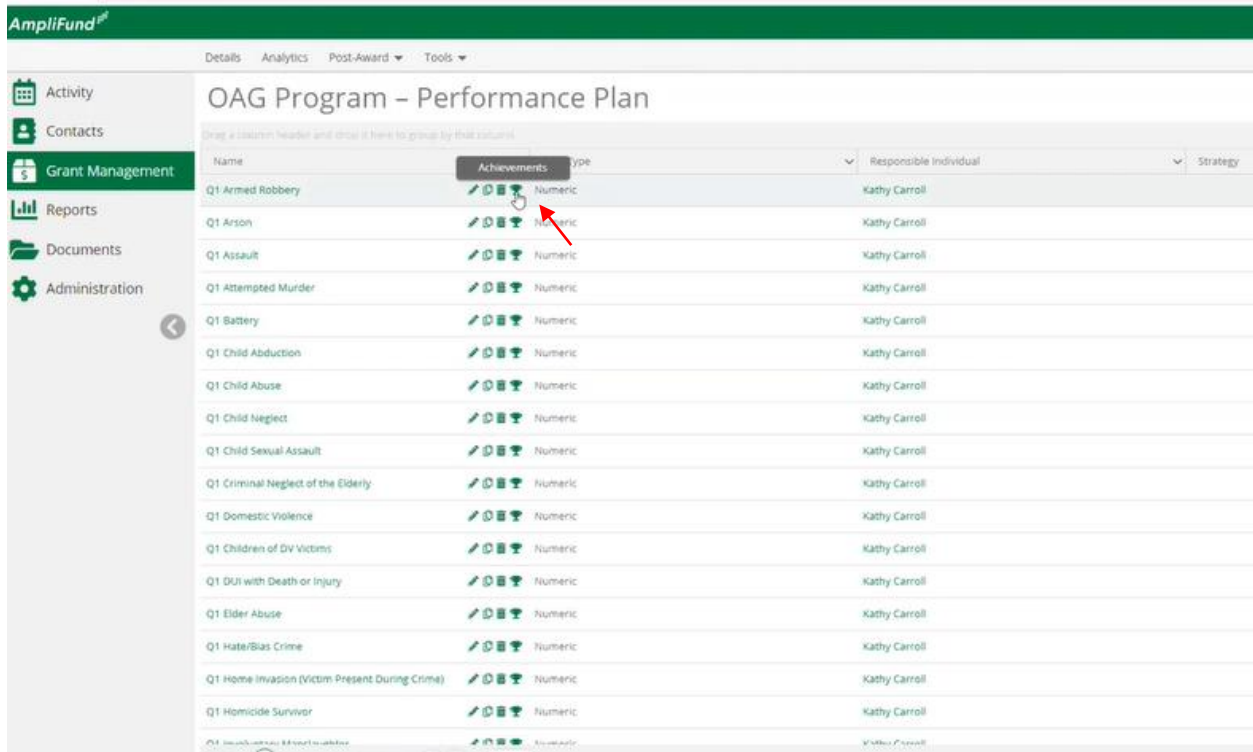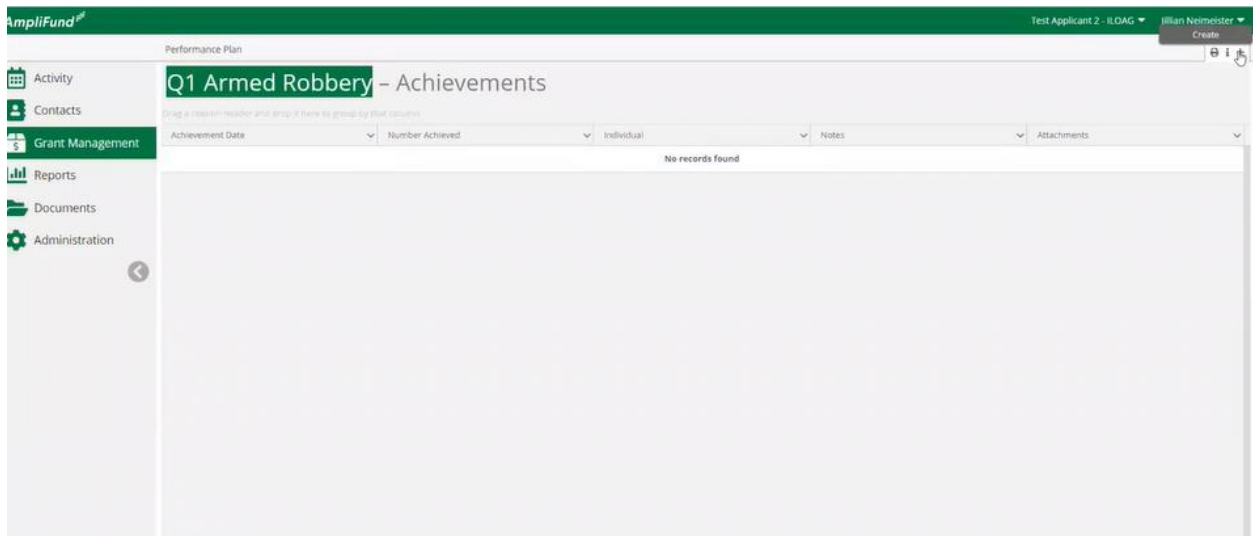To report your Achievements for the quarter, click on the trophy icon:

In this example, we are adding achievement for Armed Robbery.
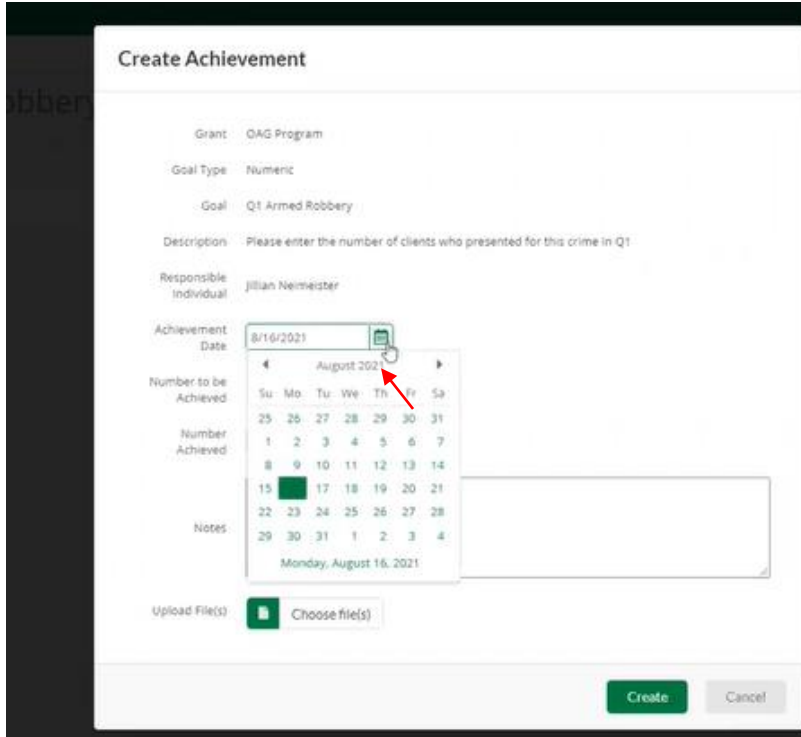
Next you will click on the + icon(create) located on the top right:

You will enter the **achievement date** and the **number achieved**. For the date of the achievement, you may use the last date of the quarter.

You may attach files relevant to the achievement. For example, an agenda for a training you attended or conducted.

Click Create:

You will follow these steps for each goal that you report on within the Performance Plan.

How to Create a Reporting Period

Once you have created your expenses, click on Details:

Click on Post-Award, Management and then Reporting Period:

On the top right hand corner, click on the + icon to create your first reporting period:
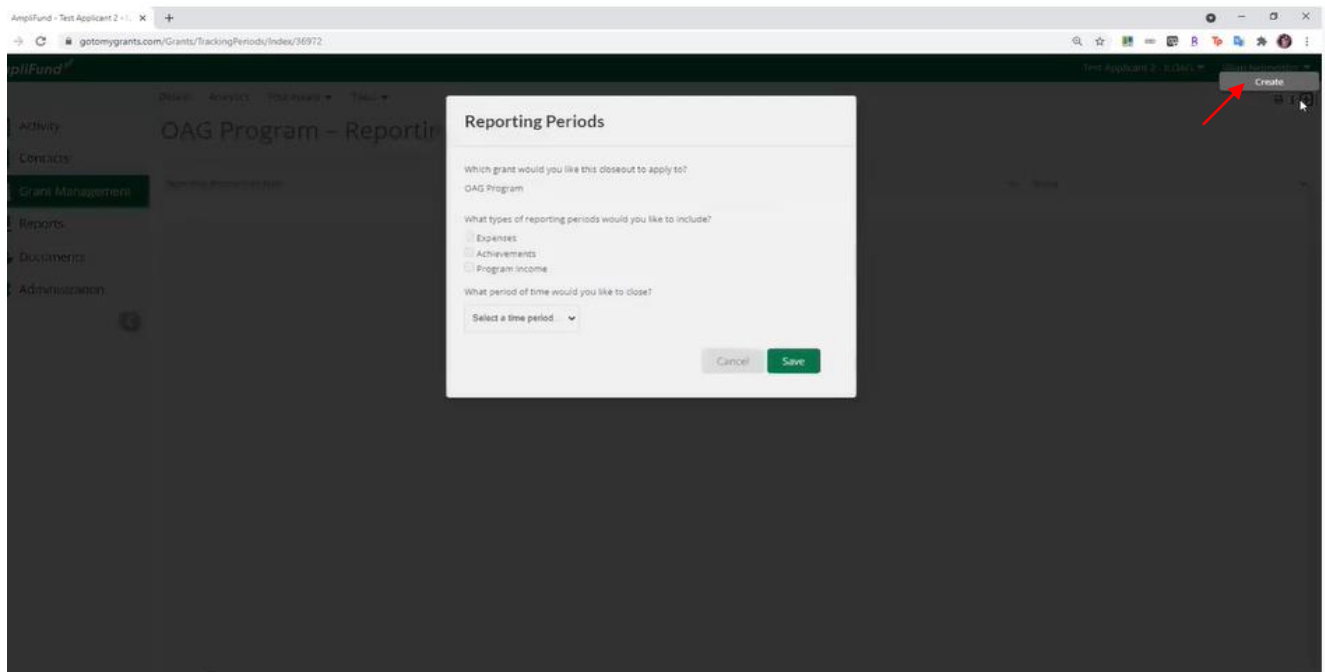
Select the type of reports you want to include. If you are finished with the achievements (performance plan) and the expenses, you will select both. You will enter the reporting period dates. For Quarter 1, you will select 7/1/2021-9/30/2021:
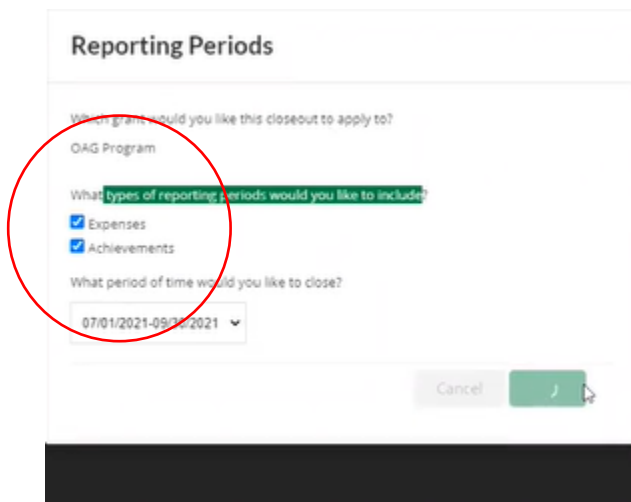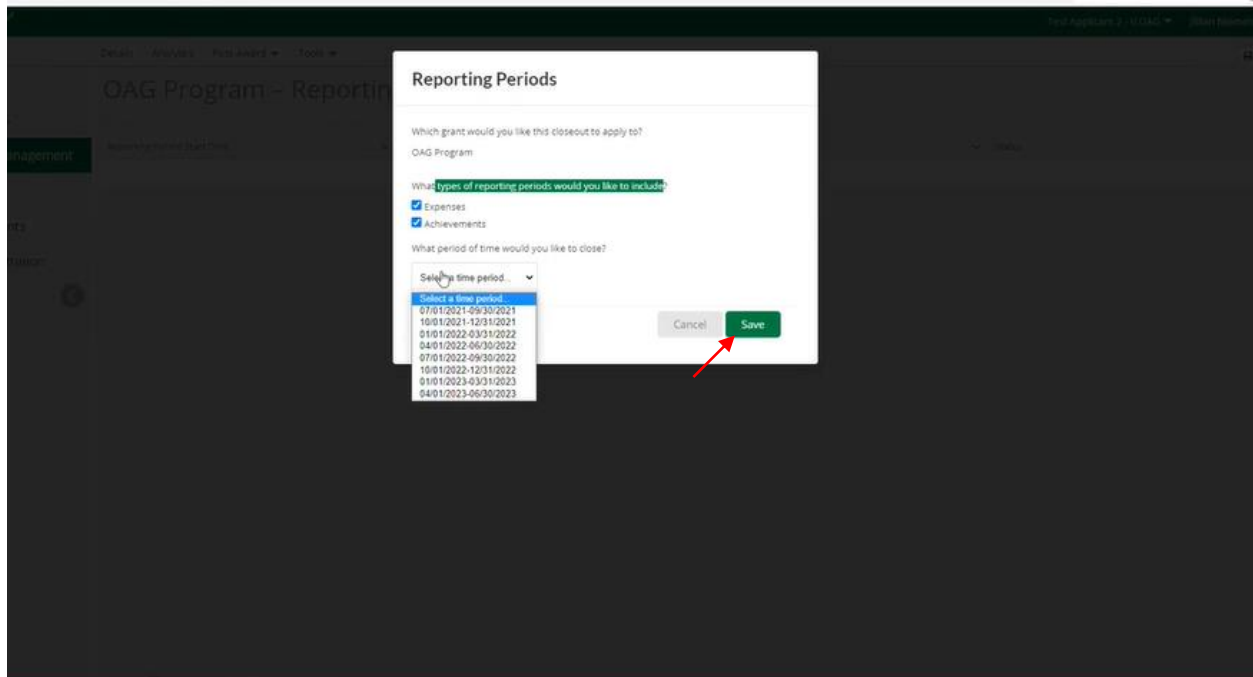
Click Save:

Closing Out the Reporting Period:

Review both Expenses and Achievements. Once reviewed and completed, you will close out the reporting period.

Overall Expense Detail, the Number of Unreviewed Expenses should be 0 before submitting:

If all expenses have been reviewed and are correct, you will click the close at the bottom right:

You will not be able to make any corrections once you close out the reporting period.

Note: You do not have to close out achievements and expenses at the same time. You may close out one at a time.