

# Managing Advance Payments in Euna Grants

A quick-reference guide for grant administrators & recipients

Euna Grants supports both **reimbursement-based** and **advance payment** models, giving funders the flexibility to release funds before expenses are incurred. This guide walks through how advance payments work in the system — from the initial request through documentation and closeout.

## HOW ADVANCE PAYMENTS WORK: STEP-BY-STEP

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| <p><b>1</b></p> <p><b>Grantee Selects "Advance"</b></p> <p>Upon creating a Payment Request, the recipient selects <b>Advance</b> as the payment type.</p> | <p><b>2</b></p> <p><b>Upload Supporting Quote</b></p> <p>A quote or estimate is uploaded at submission to document intended use of funds.</p> | <p><b>3</b></p> <p><b>Multi-Tier Approval</b></p> <p>The advance moves through your configured approval workflow. Reviewers can reject with comments.</p> | <p><b>4</b></p> <p><b>Funds Released</b></p> <p>Once all tiers approve, payment is processed. One active advance at a time is a common configurable rule.</p> | <p><b>5</b></p> <p><b>\$0 Reimbursement Close-Out</b></p> <p>After spending, the grantee submits a \$0.00 request with documentation, closing the advance.</p> |
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## KEY CONFIGURATION OPTIONS

- **Advance caps:** Set a maximum advance percentage (e.g., 25% of total award) at the program level to ensure compliance with federal or agency rules.
- **Required documentation checkbox:** Use a form extension to add a required confirmation checkbox — grantees must attest they've uploaded spend documentation before proceeding.
- **One active advance at a time:** Enforce a rule that a second advance cannot be requested until the prior one is documented and closed out.
- **Advance numbering:** Prompt grantees to label submissions (Advance 1, Advance 2, etc.) to streamline documentation matching on the funder side.
- **Multi-tier approval workflows:** Configure as many approval tiers as needed. Each tier can approve or reject, with rejection comments sent back to the grantee automatically.

## ACCEPTED DOCUMENTATION TYPES

### SPEND DOCUMENTATION FOR \$0 CLOSE-OUT

- › Invoice showing a zero balance (paid in full)
- › Copy of a cleared check — front and back
- › Bank statement showing the disbursement

### SUPPORTING DOCS AT ADVANCE REQUEST

- › Formal vendor quote or estimate
- › Informal cost summary (flexibility configurable per program)
- › Any document confirming planned use of funds

## COMPLIANCE & FLEXIBILITY FEATURES

### Public Folder for Reporting

Use the award record Public Folder to share report templates, compliance instructions, or policy documents with grantees. Recipients can upload completed reports directly — accessible by both funder and recipient.

### Program-Specific Form Extensions

Different programs can have different advance documentation requirements. Form extensions let you add required or optional fields to payment requests — globally or scoped to specific grant programs.

### Custom Forms for Monitoring

Attach custom forms (interim reports, final reports, milestone checklists) directly to award records. These work independently of the payment request workflow and can be tailored per program.

## TIPS FOR A SMOOTH ADVANCE PROGRAM

- **Train before they log in:** Send step-by-step instructions to grantees ahead of their first submission — especially important for non-finance audiences like farmers, librarians, or community organizations.
- **Use the reject function strategically:** Tier approvers can reject with detailed written feedback, guiding grantees to correct issues before resubmitting — no back-and-forth email needed.
- **Leverage "Act As User" for troubleshooting:** Admins can navigate to Administration > System Security > Users to view the system exactly as an internal user sees it.
- **Number your advances:** Asking grantees to label submissions (Advance 1, Advance 2...) makes it significantly easier to match close-out documentation to the right advance.
- **Euna support is fast:** Grantees who submit a help request via the in-system Help & Support button typically receive a response within the hour.