AMENDMENTS FOR GRANT RECIPIENTS

Amendments allow grant recipients and funding organizations to negotiate changes to an award. Recipients can propose amendments to the award amount, duration, budget categories, or program goals. Funders can review the proposed amendments and approve, deny, or request more information within AmpliFund. AmpliFund facilitates and tracks these interactions. In addition, organizations can record amendments in AmpliFund if their corresponding recipient or funding organization is not in AmpliFund.

CONTENTS

ADMENDMENTS

Amendments allow funders and recipients to negotiate changes to an award. Recipients can propose amendments to the award amount, duration, budget categories, or program goals. Funders can review the proposed amendments and approve, deny, or request more information within AmpliFund. AmpliFund facilitates and tracks these interactions.

HOW TO ADD AN AMENDMENT

Amendments can have as many as four parts: Awarded Amount, Award Duration, Category Budget, and Performance Goal.

1. Open **Grants Management>Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Management>Amendments**.
4. Click the **+ (Add icon)** next to *Amendments*.
5. To add an amendment type, click the ○ **(Activate icon)** on the grayed-out tab.

6. Click the **amendment type**.
7. Enter the information for the selected amendment type.
8. Click **Save** to save your progress or click **Submit** to send your completed amendment (including all selected amendment types) to the funding organization. Once you submit your amendment, you will not be able to edit it.

Once you submit your amendment, you will not be able to edit it.

The funding organization may change the status to *Approved, Denied* or *Needs More Information*. They also have the option to edit the amendment before approving. You will receive an email notification when the funding organization has changed the status of the amendment.

HOW TO ADD AN AWARDED AMOUNT AMENDMENT TYPE

1. Click on **Awarded Amount**. If the amendment type is not active, click the ○ (Activate icon) to activate first.

AMENDMENT REQUEST

2. Add the proposed **Amendment Name**.
3. In the *Date Requested* field, select the **date you will submit the amendment**. If this field is left empty, the date the amendment is submitted through AmpliFund (i.e., the date the *Submit* button is clicked) will be recorded. Note, if your amendment includes multiple amendment types, the *Amendment Name* and *Date Requested* fields will be the same for each type. Note, if your amendment includes multiple amendment types, the *Amendment Name* and *Date Requested* fields will be the same for each type.

4. Add the **Proposed Total Awarded Amount**. The *Current Total Awarded Amount* is listed above this field for reference.
5. Add the **Justification** for your proposed amendment. Anything added to the *Internal Notes* field will not be visible to the funder when the amendment response is submitted.
6. To *Attach Documentation*, Click **Choose File** and select a field from your computer.
7. Add any **Internal Notes** and the amendment for you or your staff to view.
8. Click **Save** to save your progress or click **Submit** to send your completed amendment (including all selected amendment types) to the funding organization. Once you submit your amendment, you will not be able to edit it.

Submission Reminder 🔔

By submitting you will be sending the amendment to the funder organization.

You cannot make any further changes after the submission.

Submit   Cancel

HOW TO ADD AN AWARD DURATION AMENDMENT TYPE

1. Click **Award Duration**. If the amendment type is not active, click the ⃝ (Activate icon) to activate first.

Award Duration ⊙   Awarded Amount ⊙   Category Budget ⊙   Performance Goal ⊙

AMENDMENT REQUESTIO

2. Add the proposed **Amendment Name**.
3. In the *Date Requested* field, select the **date you will submit the amendment**. If this field is left empty, the date the amendment is submitted through AmpliFund (i.e., the date the *Submit* button is clicked) will be recorded.
4. Add the **Proposed Length of Award** in years and months. The *Current Length of Award* is listed above this field for reference.
5. Update the **Close Out Date** as necessary.
6. Add the **Justification** for your proposed amendment.
7. To *Attach Documentation,* click **Choose a file** to select a file from your computer.
8. Add any **Internal Notes** about the amendment for you or your staff to view. Anything added to the *Internal Notes* field will not be visible to the funder when the amendment response is submitted.
9. Click **Save** to save your progress, or click **Submit** to send your completed amendment (including all selected amendment types) to the funding organization. Once you submit your amendment, you will not be able to edit it.

Submission Reminder 🔔

By submitting you will be sending the amendment to the funder organization.

You cannot make any further changes after the submission.

Submit   Cancel

HOW TO ADD A CATEGORY BUDGET AMENDMENT TYPE

1. Click **Category Budget**. If the amendment type is not active, click the ⃝ (Activate icon) to activate first.

Award Duration ⊙   Awarded Amount ⊙   Category Budget ⊙   Performance Goal ⊙

AMENDMENT REQUEST

2. Add the proposed **Amendment Name**.

3. In the *Date Requested* field, select the **date you will submit the amendment**. If this field is left empty, the date the amendment is submitted through AmpliFund (i.e., the date the *Submit* button is clicked) will be recorded. If your amendment includes multiple amendment types, the *Amendment Name* and *Date* fields will be the same for each type.

CATEGORY BUDGET

4. Select all applicable categories. If a category is not available, you can add it by clicking **Add New Category**. The *Category Name* and *Proposed Budgeted Category Total* fields will appear in the *Budget Categories* section below.
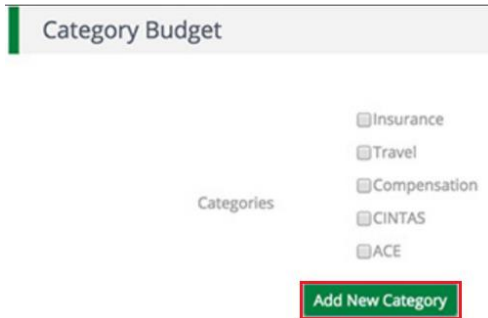
BUDGET CATEGORIES

5. Add the **proposed budget amount by category** in the respective *Proposed Budgeted Category Total* field(s). the current and actuals amount per category is listed above each field for reference. If you have added a new category, you can enter the new category in the *Name Category* field.

6. Add the **Justification** for your proposed amendment.

7. The *Attach Documentation*, click **Choose a field** to select a file from your computer.

8. Add any *Internal Notes* about the amendment for you or your staff to view. Anything added to the *Internal Notes* field will not be visible to the funder then the amendment response is submitted.

9. Click **Save** to save your progress, or click **Submit** to send your completed amendment (including all selected amendment types) to the funding organization. Once you submit your amendment, you will not be able to edit it.

HOW TO ADD A PERFORMANCE GOAL AMENDMENT TYPE

1. Click **Category Budget**. If the amendment type is not active, click the ◯(Activate icon) to activate first.

AMENDMENT REQUEST

2. In the *Amendment Name* field, enter a **name** for you proposed amendment.

3. In the *Date Requested* field, select the **date you will submit the amendment**. If this field is left empty, the date the amendment is submitted through AmpliFund (i.e., the date the **Submit** button is clicked) will be recorded. If your amendment includes multiple amendment types, the *Amendment Name* and *Date Request* fields will be the same for each type.

PERFORMANCE PLAN GOAL

4. Select all applicable **goals**. If a goal is not available, you can add it by clicking **Add New Goal**. A *Goal Type* field will appear in the *Current Performance Plan Goals* section below.

Current Performance Goals

Goal Type
Numeric

Name

Description

CURRENT PERFORMANCE PLAN GOALS

5. Add the proposed **goal(s)** in the respective *Goal Type* field(s). the current goal is listed above each field for reference. If you have added a new goal, you can enter the new **category** in the *Goal Type* field.

Current Performance Goals

Goal Type: Percent Achieved
Volunteer retention rate

Desired Percentage
50.0%

Proposed Desired Percentage

Goal Type: Percentage Changed
Increase percent of brochure requests made online

Current Percentage
5.0%

Desired Percentage
10.0%

Proposed Desired Percentage

6. In the *Justification field*, add the **justification** for your proposed amendment.
7. To *Attach Documentation,* click **Choose a field** to select a file from your from your computer.
8. In the *Internal Notes* field, add any **notes** about the amendment for you or your staff to view. Anything added to the *Internal Notes* field will not be visible to the funder when the amendment response is submitted.
9. Click **Save** to save your progress, or click **Submit** to send your completed amendment (including all selected Amendment Types) to the funding organization. Click **Cancel** to close amendment without saving any changes. Once you submit your amendment, you will not be able to edit it.

Submission Reminder

By submitting you will be sending the amendment to the funder organization.
You cannot make any further changes after the submission.

Submit   Cancel

MANAGING AMENDMENTS

HOW TO VIEW AN AMENDMENT

1. Open **Grant Management>Grants Awarded**.
2. Click on a **grant name**.
3. Open **Post-Award tab>Amendments**.
4. Click the 🔍 **(View icon)** next to an amendment name.

Amendment Name	∨	Date Created
Amendment	🔍 ✏ 🗑	11/3/2016

HOW TO VIEW AN AMENDMENT STATUS

1. Open **Grant Management>Grants Awarded**.

2. Click on a **grant name**.
3. Open **Post-Award tab>Amendments**.
4. Click on an **amendment name**.

Amendment

Amendment Type	Date Created	Date Submitted	Amendment Creator Type	Submitted By	Internal Notes
Awarded Amount	11/3/2016		Funder		
Award Duration	11/3/2016		Funder		

HOW TO EDIT AN AMENDMENT

Prerequisite: Amendment cannot be submitted to funder.

1. Open **Grant Management>Grants Awarded**.
2. Click on a **grant name**.
3. Open **Post-Award tab>Amendments**.
4. Click on the ✏ **(Edit icon)** next to an amendment name.

Amendment Name		Date Created
Amendment	🔍 ✏ 🗑	11/3/2016

5. Update the information as necessary.
6. Click **Save**.

HOW TO DELETE AN AMENDMENT

Prerequisite: Amendment cannot be submitted to funder.

1. Open **Grant Management>Grants Awarded.**
2. click on a **Grant name**.
3. open **Post-Award tab>Amendments**.
4. Click the 🗑 **(Delete icon)** next to an amendment name.

Amendment Name		Date Created
Amendment	🔍 ✏ 🗑	11/3/2016

5. Om the confirmation pop-up window, click **Delete**.