GRANTS MANAGEMENT RECIPIENT GUIDE

This guide is for grant recipients who have received an invitation to log in to AmpliFund from their funder along with the notification of their award. As a grant recipient, you will be able to view and edit your grant details, track your progress and expenses, and submit amendments to the funding organization. AmpliFund allows you to manage your grant and engage with the funding organization with transparency. Once you log in to AmpliFund, the funding organization will be notified that you have accepted the award.

CONTENTS

GETTING STARTED IN AMPLIFUND

USER NAVIGATION MENU

Click your name in the top-right corner of AmpliFund to access account information, change password, message center, support, terms and conditions, and logout.
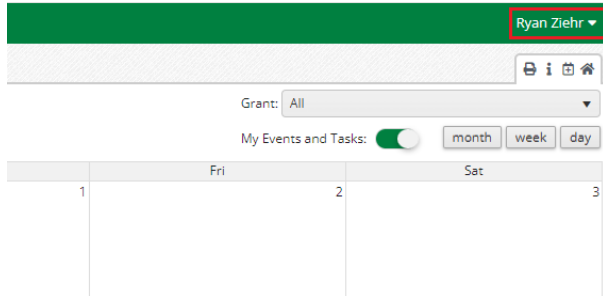
LEFT NAVIGATION PANEL

The left navigation panel is the main navigation for AmpliFund. Click any of the top-level menu items to show the sub-menus, and click any sub-level item to open a page. Most menu pages (i.e. Contacts>Staff) will take you to a list view. To view a list item's details, click the item's name. Click the arrow icon to collapse the navigation to just icons. Hover over the icons to see the menu name, and click on the menu name or icon to show the submenu.

COLLAPSED
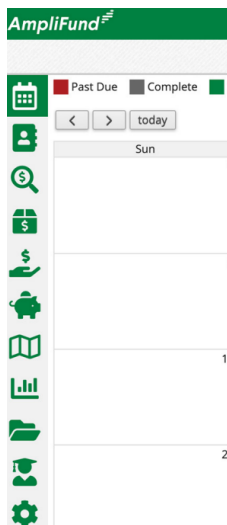
EXPANDED
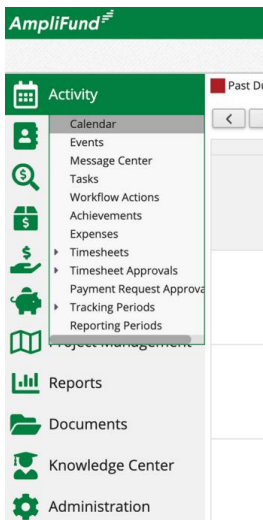
CONTEXT-SPECIFIC TABS

Once you navigate to an item's details, you will see context-specific tabs above item. This menu will show additional information related to that item.
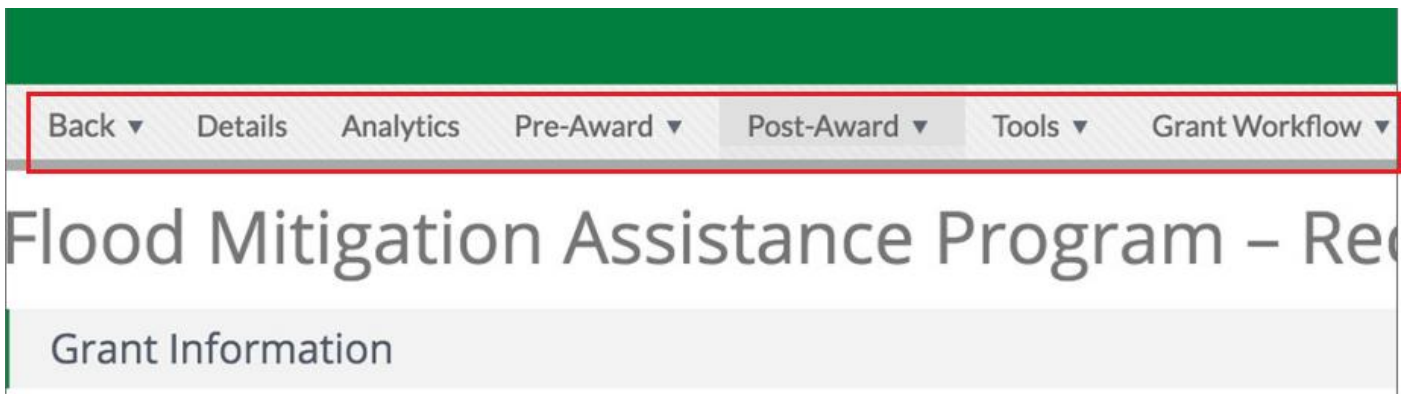
ICONS

Icons allow you to perform actions on an item, such as edit, add, or delete. Icons may appear next to an item in a list view, or in the Icon Bar just below the User Navigation Menu. Hover over any icon to see its action.
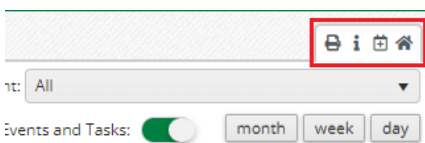
CALENDAR

When you first log in, you will see the Calendar. This will show any tasks or events for your award.
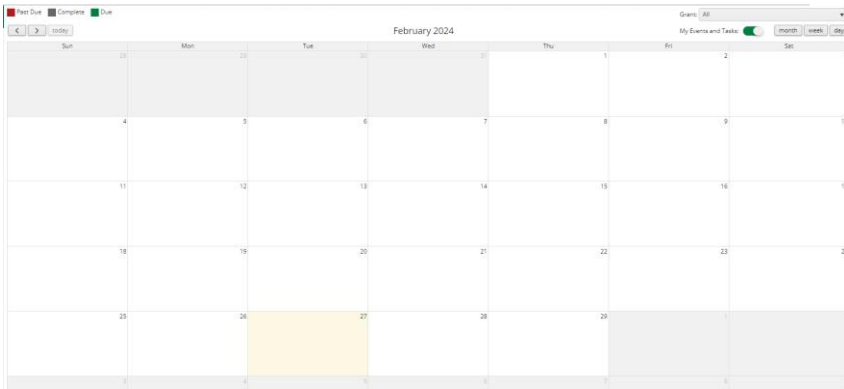
BEFORE YOU CAN MANAGE YOUR GRANT

Before you can manage your grant, you will need to add any other users from your organization (including your Grant Manager and Responsible Individual), add grant details, and assign roles and responsibilities. This section of the guide is intended for users who will set up the account and grant. Depending on your funder's settings, you may also need to configure and edit the grant budget and performance plan.

ACCOUNT SET UP

This section describes the minimum actions needed for Organizational Admin users to set up an AmpliFund account.

HOW TO ADD A NEW USER

Prerequisite: must be an Organizational Admin.

Adding a new user to AmpliFund will automatically add them to your Contacts>Staff list. Users must be sent an invitation before they can access AmpliFund.

1. Open **Administration>System Security>Users**.
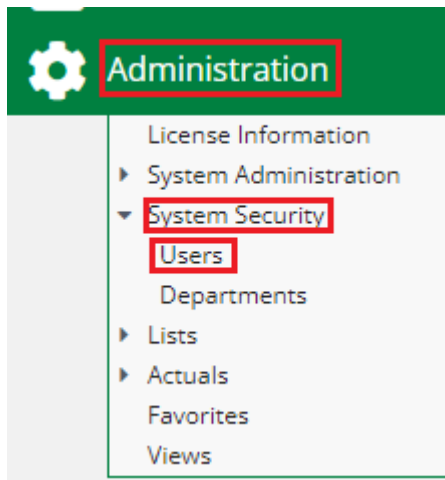
2. Click the **+ (Create Icon)** in the Icon Bar.

USER INFORMATION

3. Select if the user will **Subscribe to Daily Emails** or **Subscribe to Weekly Emails**. Once the user activates their account, they can update their email subscription preferences.
4. Select the user's security **Role**. For more details on security roles, see Security Roles.

a. **Organizational Admin**: Can create, view, and edit all records in the account.

b. **Executives**: Can view all records in the account.

STAFF INFORMATION

5. Add the user's **First Name** and **Last Name**.
6. Add the user's job **Title** (optional).
7. Select the user's Select the user's Supervisor (optional). This lists pulls from Contacts>Staff. (optional). This lists pulls from Contacts>Staff.
8. In the Track Time dropdown, select how frequently the user will **track their time** for timesheets. This field will not have any impact on how you manage your grant.
9. Add the user's **primary address** (optional).
10. Add the user's **primary Email Address**. The user's email address will also be used as their account login, so it must be unique and cannot be changed. However, additional contact email addresses may be added and edited.

11. Click **Create**.

12. To send the user an invitation to AmpliFund, click the ✉ **(Invite to AmpliFund icon)** in the *Icon Bar*. The user will receive an email with a link prompting them to create a password.

13. In the confirmation pop-up window, click **Send Invitation**.

GRANT SET UP

This section describes the minimum actions needed for Organizational Admin or Grant Managers to set up grant information.

HOW TO ADD GRANT DETAILS

The grant details are shared between your organization and the funder. On the Details page, you will see funder-added information, and can add your recipient-specific information. The information you add on this page will be visible to the funder unless stated otherwise.

1. Open **Grant Management>Grants>All Grants**.
2. Click on the ✏ **(Edit icon)** next to a grant name.

AWARD STATUS

3. Update **Recipient Award Name** (optional).

AWARD INFORMATION

4. Select the **Recipient Grant Manager**. This list populates from *Contacts>Staff*. Grant Managers have full access to edit grant details, and create, edit, and delete all items related to their grant. These users may also assign responsibility for goals and line items to other users.
5. Add **Recipient Description** of the grant (optional).

RECORD INFORMATION

6. Add a **Unique Identifier** (optional). This Unique Identifier could be used to link the grant to another system that you use. This information will not be visible to the funding organization.
7. Click **Save**.

BUDGET SET UP

Depending on your funder's grant settings, you may not be able to edit your grant's budget.

Once your budget is set up, you can begin to track expenses against your planned budget. Budgets show the budget categories, grant-funded amounts, match amounts, total costs, and total revenue by default. Additionally, the grant years, line items, and Responsible Individuals can be shown or hidden.

Budget settings define a grant's default match and indirect cost rate, budget categories, and benefit types. The budget settings should be configured before adding budget categories or line items. In addition, budget settings can be set on the category or line item.

HOW TO ADDA CATEGORY TO THE BUDGET

Budget categories can be selected from the Post-Award tab >Settings >Budget Settings. Budget categories inherit settings from the budget by default.

Depending on your account settings, this record type may have additional custom fields or sections.

1. Open **Grant Management>Grants>All Grants.**
2. Click a **grant name**.
3. Open **the Post-Award tab>Financial>Budget**.
4. Click the **+ (Add icon)** next to *Expense Budget*.
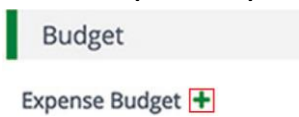
CATEGORY DETAILS

5. In the pop-up window, select a **Category**. This list pulls from the categories created in *the Post-Award tab>Settings>Budget Settings*.
   a. If the category is not listed, click **Add New Category to Budget**.
   b. In the *Categories* section, select a **Budget Category** and click **Add**.
   c. Click **Save**.
6. Enter the **Budgeted Amount** for the category. The sum of the line items within this budget category cannot exceed this amount.
7. Select the **Indirect Cost** requirements for all line items within the category.
   a. **Disable**: indirect cost will not be tracked within the budget category.
   b. **Enable**: indirect cost may be tracked within the budget category on a per-line item basis.
   c. **Require**: indirect cost will always be tracked within the budget category.
8. Select the **Cash Match** requirements for all line items within the category.
   a. **Disable**: cash match will not be tracked within the budget category.
   b. **Enable**: cash match may be tracked within the budget category on a per-line item basis.
   c. **Require**: cash match will always be tracked within the budget category.
9. Select the **In-Kind Match** requirements for all line items within the category.
   a. **Disable**: in-kind match will not be tracked within the budget category.
   b. **Enable**: in-kind match may be tracked within the budget category on a per-line item basis.
   c. **Require**: in-kind match will always be tracked within the budget category.
10. Click **Create.**

HOW TO ADD A BUDGET LINES ITEM

Budget line items are the planned expenses related to a grant and contain information such as responsible individuals and attachments.

1. Open **Grant Management>Grants>All Grants.**
2. Click a **grant name**.
3. Open the **Post-Award tab>Financial>Budget**.

4. Click the **+ (Add icon)** next to a budget category.

5. On the General tab, add a line item **Name**.
6. Add the **Direct Cost**.
7. Check **the Exclude From Match checkbox** as necessary. This option will not be available if the category match requirements are set to *Disable* or *Require*.
8. Check **the Exclude From Indirect checkbox** as necessary. This option will not be available if the category match requirements are set to *Disable* or *Require*.
9. Select the **Responsible Individual**. Responsible Individuals are responsible for overseeing a performance goal or line item's completion. They can view grant details, performance plans, or budget plans. This list pulls from *Contacts>Staff*.
10. Add a **Description** (optional).
11. Open the **Financials tab**.
12. Add the **Cash Match Amount** and **In-Kind Match Amount** in dollars or percentages.

13. Click **Create.**

HOW TO ADD AN ATTACHMENT TO A BUDGET LINE ITEM

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Financial>Budget**.
4. Click the ✏ **(Edit icon)** next to a line item.
5. In the pop-up window, open the **Attachments tab.**
6. Click **Choose a File** to select a file from your computer.
7. Click the **+ (Add icon)** to add additional attachments as needed.
8. Click **Save.**

PERFORMANCE SET UP

Depending on your funder's grant settings, you may not be able to edit your grant's performance plan.

A grant's performance is measured by achievements against programmatic goals. If achievements are not meeting their given goal allocations, the grant's performance risk may be impacted. Once your performance plan is set up, you can begin to track achievements against performance goals.

The Performance Plan list shows the Name, Goal Type, Responsible Individual, and Strategy columns by default. In addition, the following columns may be shown: Status, Created By, Created Date, Modified By, and Modified Date. Each of these columns may be shown or hidden, sorted, or filtered.

GOAL TYPES

Goals are measurable activities planned to ensure grant deliverables are met on the grant's timeline. Each goal must have a Responsible Individual who will be responsible for tracking achievements against that goal . AmpliFund has six types of goals.

MILESTONE GOALS

Milestone goals are the most basic goal type. They allow for tracking progress as a "Yes" or "No" response by the Responsible Individual. An example of a milestone goal is "Create and send Q1 Staff Survey."

NARRATIVE GOALS

Narrative goals are question and answer goals. Responsible Individuals may answer the question posed by the goal. An example of a narrative goal is "How successful was the grant-related activity this period?"

NUMERIC GOALS

Numeric goals are a discrete number to achieve. As units of the goal are completed, Responsible Individuals may record units completed. An example of a numeric goal is "number of program participants" with a goal target of 50.

PERCENT ACHIEVED GOALS

Percent achieved goals are goals to reach a desired percent. When tracking progress against a percent achieved goal, Responsible Individuals may capture Total Possible and Total Achieved percentages. An example of a percent achieved goal is "Volunteer Retention Rate" with a goal target of 70%.

PERCENT CHANGE GOALS

Percent change goals are goals to track a percent increase or decrease. Percent change goals are defined with a starting percent and a desired percent. When tracking progress against a percent change goal, Responsible Individuals may capture Total Possible and Total Achieved percentages. An example of a percent change goal is "Decrease in Student Absences" with a starting absentee rate of 10%, and a goal absentee rate of 3%.

REIMBURSEMENT GOAL

Reimbursement goals are goals with a discrete unit to achieve, and a dollar rate associated per unit. When tracking progress against a reimbursement goal, Responsible Individuals may enter Units Achieved. If the goal is added as a budget item, the reimbursement goal will appear as part of the grant's expense budget. If a reimbursement goal is shown on the grant budget, any updates made to the goal through the performance plan will automatically update the budget. An example of a Reimbursement goal is "Number of Patient Screenings" with target/ maximum units of 100, and a reimbursement rate per unit of $22. Reimbursement goals are used to support pay for performance grants.

HOW TO ADD A PERFORMANCE GOAL

When creating a new goal, the fields may vary depending on the goal type.

Prerequisite: Must be Organizational Administrator or Grant Manager and have performance plan creation permissions as set by the funding organization in AmpliFund.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.

3. Open the **Post-Award tab>Performance>Performance Plan**.
4. Click the **+ (Create icon)** in the Icon Bar.
5. Select a **Goal Type**. This could be Milestone, **Narrative, Numeric, Percent Achieved, Percent Changed**, or **Reimbursement**.
6. Add the goal information.
7. Click **Save**.

HOW TO ADD A MILESTONE PEROFRMANCE GOAL

Milestone goals are the most basic goal type. They allow for tracking progress as a "Yes" or "No" response by the Responsible Individual. An example of a milestone goal is "Create and send Q1 Staff Survey."

1. Open Grant **Management>Grants>All Grants**.
2. Click **a grant name**.
3. Open the **Post-Award tab>Performance>Performance Plan**.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. In the *Goal Type* dropdown, select **Milestone**.
6. Add the goal **Name**.
7. Add the goal **Description** (optional).
8. Select the **Responsible Individual**. This list pulls from *Contacts>Staff*. The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.
9. Select a goal **Due Date**.
10. Click C**reate**.

HOW TO ADD A NARRATIVE PERFORMANCE GOAL

Narrative goals are question and answer goals. Responsible Individuals may answer the question posed by the goal. An example of a narrative goal is "How successful was the grant-related activity this period?"

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Performance>Performance Plan**.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. In the *Goal Type* dropdown, select **Narrative**.
6. Add the goal **Name**.
7. Add the goal **Description** (optional).
8. Select the *Responsible Individual*. This list pulls from *Contacts>Staff*. The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.
9. Add the **Question** that the goal will answer.
10. Click **Create**.

HOW TO ADD A NUMERIC PERFORMANCE GOAL

Numeric goals are a discrete number to achieve. As units of the goal are completed, Responsible Individuals may record units completed. An example of a numeric goal is "number of program participants" with a goal target of 50.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Performance>Performance Plan**.
4. Click the **+ (Create icon)** in the *Icon Bar*.

5. In the *Goal Type* dropdown, select **Numeric**.
6. Add the goal **Name**.
7. Add the goal **Description** (optional).
8. Select the **Responsible Individual**. This list pulls from *Contacts>Staff*. The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.
9. Add the **Number To Be Achieved**.
10. Click **Create**.

HOW TO ADD A PERCENT ACHIEVED PERFORMANCE GOAL

Percent achieved goals are goals to reach a desired percent. When tracking progress against a percent achieved goal, Responsible Individuals may capture Total Possible and Total Achieved percentages. An example of a percent achieved goal is "Volunteer Retention Rate" with a goal target of 70%.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Performance>Performance Plan**.
4. Click the **+ (Create icon)** in the Icon Bar.
5. In the Goal Type dropdown, select **Percent Achieved**.
6. Add the goal **Name**.
7. Add the goal **Description** (optional).
8. Select the **Responsible Individual**. This list pulls from *Contacts>Staff*. The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.
9. Add the **Percent Desired**.
10. Click **Create**.

HOW TO ADD A PERCENT CHANGED PERFORMANCE GOAL

Percent changed goals are goals to track a percent increase or decrease. Percent changed goals are defined with a starting percent and a desired percent. When tracking progress against a percent changed goal, Responsible Individuals may capture Total Possible and Total Achieved percentages. An example of a percent change goal is "Decrease in Student Absences" with a starting absentee rate of 10%, and a goal absentee rate of 3%.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Performance>Performance Plan**.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. In the *Goal Type* dropdown, select **Percent Changed**.
6. Add the goal **Name**.
7. Add the goal **Description** (optional).
8. Select the **Responsible Individual**. This list pulls from *Contacts>Staff*. The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.
9. Add the **Current Percent** and **Percent Desired**.
10. Click **Create**.

HOW TO ADD A REIMBURSEMENT PERFORMANCE GOAL

Reimbursement goals are goals with a discrete unit to achieve, and a dollar rate associated per unit. When tracking progress against a reimbursement goal, Responsible Individuals may enter Units Achieved. If the goal is added as a

budget item, the reimbursement goal will appear as part of the grant's expense budget. If a reimbursement goal is shown on the grant budget, any updates made to the goal through the performance plan will automatically update the budget. An example of a Reimbursement goal is "Number of Patient Screenings" with target/ maximum units of 100, and a reimbursement rate per unit of $22. Reimbursement goals are used to support pay for performance grants.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Performance>Performance Plan**.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. In the *Goal Type* dropdown, select **Reimbursement**.
6. Check the **Add as Budget Line Item checkbox** to add the goal to the grant's expense budget.
7. Add the goal **Name**.
8. Add the goal **Description** (optional).
9. Select the **Responsible Individual**. This list pulls from *Contacts>Staff*. The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.
10. Add the **Rate Per Achievement** in dollars.
11. Add the **Number To Be Achieved**.
12. Click **Create**.

HOW TO ADD AN ATTACHMENT TO A PERFORMANCE GOAL

All goals allow you to add an attachment.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Performance>Performance Plan**.
4. Click the ✏ **(Edit icon)** next to a goal name.

Research effectiveness of public service announcements ✏ 🗐 🗑

5. In the pop-up window, open the **Attachments tab**.

Add to Performance Plan

General   Attachments

6. Click **Choose a file** to select a file from your computer.
7. Click the **+ (Add icon)** to add additional files (optional).

Attach Documentation

Choose a file ➕◻

8. Click **Save**.

MANAGING YOUR GRANT

Once you've set up your grant, you are ready to manage your grant's progress through expenses, achievements, reporting periods, and payment requests. Additionally, you can access documents from the funding organization and complete any assigned tasks.

TOOLS

Grant tools include documents (files), tasks, notes, and emails.

Icon	Function
🖶	Print
ℹ	Help
🔖	Save Current View
🖆	Export
✏	Edit
🗐	Copy
🗑	Delete

HOW TO ACCESS GRANT DOCUMENTS FROM FUNDER

Any file uploaded to your grant or grant-related items is centrally stored in the Documents section of AmpliFund. Additionally, funders and recipients can share files in the grant's Public folder. All other documents will not be shared unless specifically submitted to the funder, such as attachments on payment requests.

1. Open **Documents > Grants**.
2. Click a **grant name**.
3. Click **Public**.

Name	⌄	Typ
Public		Folc
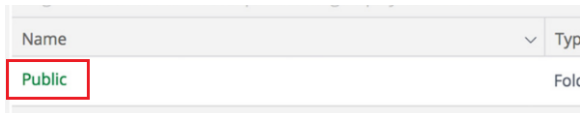
4. Click a **document name** to view.

HOW TO MARK A TASK AS COMPLETE

Tasks can be system-generated or user-created. Once a task has been assigned, the assignee(s) will receive up to three email reminders based on the task settings. Once a task is completed, no further email reminders will be sent. If a task is not completed by its due date, daily email reminders will be sent to the assignee until the task is completed.

1. Open **Activity > Tasks**.
2. Click the ☑ **(Mark as Complete icon)** next to a task name.

Name	⌄	Responsible Individual	⌄
Budgeting Tracking Period Due - FY 2018 Block Grant ✏ 🗑 ✓		Sherry Gray	
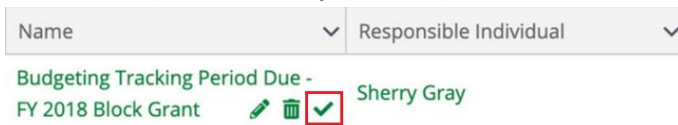
3. In the confirmation pop-up window, click **Mark as Complete**.

--OR—

1. Open **Activity>Calendar**.
2. Click on a **task**.

3. In the pop-up window, click **Mark as Completed**.

EXPENSES

As you spend down against budgeted line items, that line item's partial or whole completion may be marked at any time by adding an expense record. Expenses may be added through the Expenses list, budget, or the grant's *Post-Award tab>Financial>Expenses*. Depending on your account settings, there may be additional fields or sections in a *Custom tab*. Expenses can also be included in Reporting Periods to the funder.

HOW TO ADD AN EXPENSE

Prerequisite: Must be an Organizational Admin, Grant Manager, Additional Staff, or Responsible Individual; Grant must allow manual entry for GL Actuals on Grant Details page.

Expenses are charges spent against a planned grant budget line item. If an expense exceeds a line item's spending alert, the Grant Manager will receive an email notification. If an expense exceeds a line item's expense cap, it cannot be added. Expenses can also be imported in *Administration>Actuals>Expense*.

1. Open **Activity>Expenses**.
2. Click the **+ (Create Expense icon)** under *Actions*.

3. In the pop-up window, select a **Grant**.
4. Select a **Category**.
5. Select a **Line Item**.
6. Add the **Direct Cost**.
7. Check the **Exclude From Match checkbox** if necessary.
8. Select an **Expense Date**.
9. Select the **Expense Status**.
    a. **New**: A new Expense
    b. **Matched**: The expense has been added both manually and imported (i.e. a potential duplicate)
    c. **Reviewed**: The expense has been reviewed
    d. **Payment Requested**: The expense has been invoiced to the funder.
    e. **Paid**: The expense has been paid by the funder
    f. **Denied**: The expense has been denied by the funder
10. Select **Payee type** and **Payee,** or **Create New payee** and add **Payee name**. The payee is the entity that received the expense funds in exchange for services or goods.
11. Add a **Description** (optional).
12. Click **Save**.

HOW TO ADD INDIRECT EXPENSES

Prerequisite: Must be an Organizational Admin, Grant Manager, Additional Staff, or Responsible Individual; Grant must allow manual entry for GL Actuals on Grant Details page.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Financial>Budget**.

4. Click the **$ (Expenses icon)** next to the Indirect Cost line item.

5. Click the **+ (Create icon)** under *Actions*.

6. Add the **Direct Cost** amount.
7. Check the **Exclude From Match checkbox** if necessary.
8. Select an **Expense Date**.
9. Select the **Expense Status**.
    a. **New**: A new expense
    b. **Matched:** The expense has been added both manually and imported, a possible duplicate
    c. **Reviewed:** The expense has been reviewed
    d. **Payment Requested:** The expense has been invoiced to the funder
    e. **Paid:** The expense has been paid by the funder
    f. **Denied:** The expense has been denied by the funder
10. Add a **Description** (optional).
11. Click **Save**.

HOW TO MARK AN EXPENSE AS REVIEWED

Expenses may be marked as reviewed by Responsible Individuals, Grant Managers, and Organizational Administrators. This will change the expense status to Reviewed.
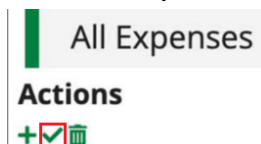
1. Open **Activity>Expenses**

FILTER BY

2. Select a **Grant**, **Category**, and/or **Line Item** to view (optional)
3. Select a **Time Frame** to view.
4. Click **Run**.

ALL EXPENSES

5. Check the **checkbox** to the left of an expense.
6. Click the ✔ **(Mark as Reviewed icon)** below Actions.

7. In the confirmation pop-up window, click **Complete**.

ACHIEVEMENTS

Achievements are progress accomplished against planned grant programmatic goals. As you make progress against a goal, that goal's partial or whole completion may be marked at any time by adding an achievement. Depending on your account settings, there may be additional fields or sections in a *Custom tab*.

HOW TO ADD AN ACHIEVEMENT

Prerequisite: must be an Organizational Admin, Grant Manager, Additional Staff, or Responsible Individual.

1. Open **Activity>Achievements**.
2. Click the **+ (Add Achievements icon)** next to an activity name.

Activity Name		Grant Name		Goal Type
Research topics for future seminars 🏆➕		Health Promotion and Disease Prevention Research		Narrative

3. In the pop-up window, select an **Achievement Date**.
4. Add an **achievement**. Depending on the goal type, the achievement might be a number, percentage, or completion.
5. Add **Notes** and **Attachments** (optional).
6. Click **Create**.

REPORTING PERIODS

Reporting periods allow recipient clients to report on the health and progress of their grant to their funding organization in regularly segmented intervals over the lifetime of the grant. The reporting interval requirements are set by the funder. Reporting periods can include expenses and achievements. Recipient Grant Managers and Organizational Administrators can view, create, edit, and close reporting periods.

HOW TO ADD A REPORTING PERIOD

Note: depending on your account settings, this record type may have additional custom fields or sections.

1. Open **Activity>Reporting Periods>Open**.
2. Click a **grant name.**
3. Click the **+ (Create icon)** in the *Icon Bar*.
4. In the pop-up window, select a **grant**.
5. Select the types of reporting periods to include. This could include **Expenses** and/or **Achievements**.
6. Select a period of time.
7. Click **Save**.

HOW TO ADD AN EXPENSES TO REPORTING PERIOD

Note: Expenses must be reviewed in order to be included in reporting periods or payment requests.

From the *Expenses tab*, you can review expense details, view expense analytics, and select expenses to close out in the reporting period. The reporting period will include all reviewed expenses for the given time period.

OVERALL EXPENSE DETAILS

1. Add **Comments** (optional).
2. To attach documentation, click **Choose File** (optional).

EXPENSES CLOSEOUT

3. Select expense **category names** to close out. The Total Amount for the category includes any reviewed expenses for the period. To select all expenses, check the **Select All checkbox**.

4. Click **Save** to save your progress, or **Close** to close the reporting period and submit it to the funding organization.

Once a reporting period is closed you cannot add or edit expenses.
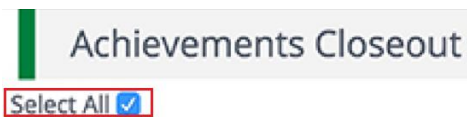
HOW TO ADD AN ACHIEVEMENTS REPORTING PERIOD

From the *Achievements tab*, you can review achievement details, view analytics, and select achievements to close out in the reporting period. The reporting period will include all achievements for the given time period.

OVERALL ACHIEVEMENTS DETAILS

1. Add **Comments** (optional).
2. To attach documentation, click **Choose File** (optional).

ACHIEVEMENTS CLOSEOUT

3. In the *Achievements Closeout* section, select **goals** to close out. To select all goals, check the **Select All checkbox.**

4. Click **Save** to save your progress, or **Close** to close the reporting period and submit it to the funding organization.

Once a reporting period is closed you cannot add or edit achievements.

HOW TO CLOSE A REPORTING PERIOD

1. Open **Activity>Reporting Periods>Open**.
2. Click a **grant name**.
3. Click a **reporting period start date**.
4. Click **Close** to close the reporting period and submit it to the funding organization.
5. In the confirmation pop-up window, click **Close**.

CASH FLOW

AmpliFund tracks money requested and received in the Cash Flow section of the Post-Award tab. Payment requests allow grant recipients to invoice grant funding organizations for expenses accrued (reimbursement) or anticipated (cash advance) during the life of the grant. Payment requests can be submitted directly to the funder for review and approval and recipients can create cash receipts to track received payments from the funder.

HOW TO ADD A PAYMENT REQUEST

Payment requests can be created independently, or directly from closed tracking or reporting periods by clicking the

 (Payment Request icon) next to a period name on *Post-Award tab>Management>Tracking Periods* or

>*Reporting Periods*. The fields available may vary depending on your account status as a recipient or standalone client.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Cash Flow>Payment Requests**.
4. Click the **+ (Create icon)** in the *Icon Bar*.

PAYMENT REQUEST INFORMATION

5. Update the **Payment Request Name** as necessary. The Payment request name defaults to show grant name and date created.
6. Add **Date Created**.
7. Select **Reporting Period(s)** to include (optional). The expenses in the closed period will populate the totals in the *Financial Detail* section.
8. Select **Expenses From** and **To** dates. Any expenses that fall into those dates that are not already attached to a payment request will populate the totals in the *Financial Details* section.
9. Select **Payment Type**.
   a. **Reimbursement**: Request payment for costs accrued.
   b. **Advance**: Request payment for anticipated expences.
10. Select a **Payment Request Status**.
    a. **Not Submitted**: Payment request has not been submitted to the funder.
    b. **Submitted**: Payment request has been approved by the funder.
    c. **Approved**: Payment request has been rejected by the funder.
    d. **Rejected**: Payment request has been rejected by the funder.
    e. **Paid**: Payment has been received.
11. If payment request has been submitted, add **Date Submitted** (optional).

COSTS

12. To view category details, click the **category name**. This shows the reviewed expenses in the closed tracking or reporting period, or from the dates selected.
13. To add additional expenses, select a **Budget Category** and add **expense amount** in the *Additional Expenses* field (optional).
14. To update total match contribution, click the ✏ **(pencil/Edit icon)** next to the match total (optional).

Match

$0.00

$0.00

$0.00

$0.00 ✏

15. Add **Requested Amount**.
16. If payment request has been *Approved*, add the **Approved Amount**.

ADDITIONAL INFORMATION

17. Add **Comments** (optional). These will be visible to the funder.
18. Click **Choose file(s)** to add attachments (optional).

Click **Create** or **Submit** to send to the funder. Once the payment request is submitted, you can no longer edit the payment request.

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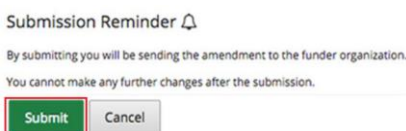
Once you submit your amendment, you will not be able to edit it.

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.

AWARDED AMOUNT

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.

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.
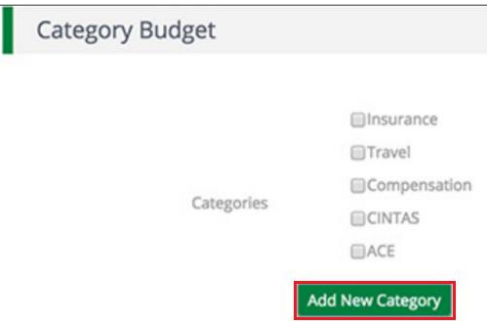
BUDGET CATEGORIES

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.

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.

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.

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