

AmpliFund 

Grants Management

Recipient Guide

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Recipient Overview

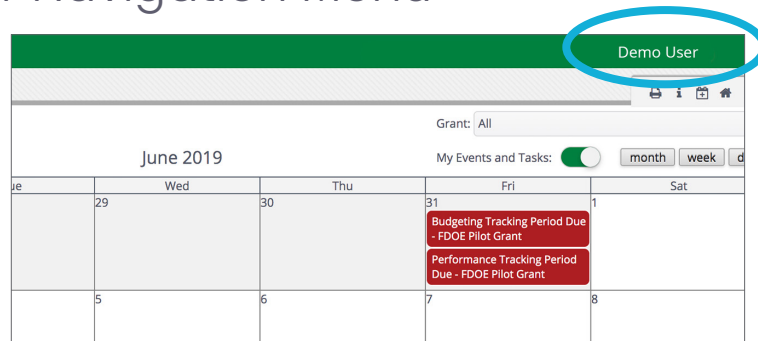
This guide is for grant recipients who have received an invitation to log in to AmpliFund from their funder along with the notification of their award. As a grant recipient, you will be able to view and edit your grant details, track your progress and expenses, and submit amendments to the funding organization. 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. For more information on using AmpliFund, review our user guides, video tutorials, FAQs, and more on the AmpliFund Support Site, amplifund.zendesk.com.

Getting Started in AmpliFund

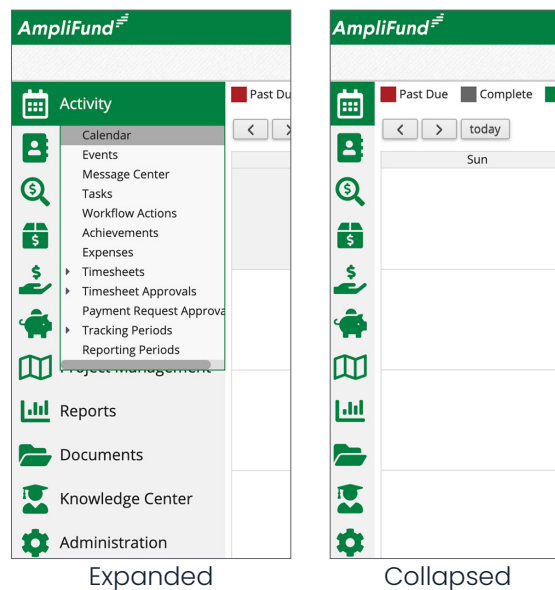
AmpliFund uses menus, tabs, and icons for navigation and actions. You can also review the AmpliFund User Interface Navigation guide on our [Support Site](#) for more information.

User Navigation Menu



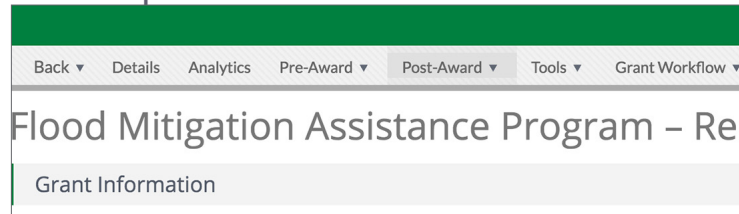
Click your name in the top-right corner of AmpliFund to access account information, change password, message center, support, terms and conditions, and logout.

Left Navigation Panel



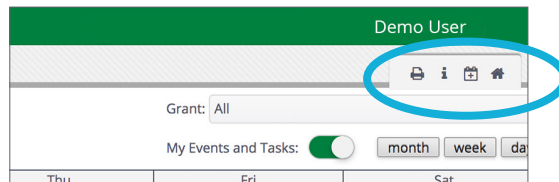
The left navigation panel is the main navigation for AmpliFund. Click any of the top-level menu items to show the sub-menus, and click any sub-level item to open a page. Most menu pages (i.e. *Contacts > Staff*) will take you to a list view. To view a list item's details, click the item's name. Click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

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.

Icons

	Print
	Help
	Save Current View
	Create
	Edit
	Delete
	Act as User
	Invite to AmpliFund
	Import
	Export

Account Set Up

This section describes the minimum actions needed for Organizational Admin users to set up an AmpliFund account. For more information on account administration, see the [AmpliFund Administration User Guide](#).

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.

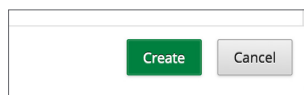
1. Open **Administration>System Security>Users**.
2. Click the **+** (**Create Icon**) in the *Icon Bar*.

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](#).
 - **Organizational Admin:** Can create, view, and edit all records in the account.
 - **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 **Supervisor** (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**.
11. Click **Create**.



Note

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.

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**.

Icons

-  Print
-  Help
-  Save Current View
-  Export
-  Edit

Grant Set Up

This section describes the minimum actions needed for Organizational Admin or Grant Managers to set up grant information. For more information on grant management, see the [AmpliFund Grant Management User Guide](#).

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.

Name	Grantor
Community Development	Ohio Development Services
Block Grants (Ohio)   	Agency

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**.

Icons

	Print
	Help
	Save Current View
	Export
	Edit

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.

For more information on budgets, see the [AmpliFund Grant Management User Guide](#).

Note

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

How To Add a 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.

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*.



Note

Line items within the budget category will inherit its settings.

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.
 - **Disable:** indirect cost will not be tracked within the budget

Note

Depending on your grant budget settings as set by the funder, this option may not be available.

- category
- **Enable:** indirect cost may be tracked within the budget category on a per-line item basis
 - **Require:** indirect cost will always be tracked within the budget category
8. Select the **Cash Match** requirements for all line items within the category.
 - **Disable:** cash match will not be tracked within the budget category
 - **Enable:** cash match may be tracked within the budget category on a per-line item basis
 - **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.
 - **Disable:** in-kind match will not be tracked within the budget category
 - **Enable:** in-kind match may be tracked within the budget category on a per-line item basis
 - **Require:** in-kind match will always be tracked within the budget category
 10. Click **Create**.

How To Add a Budget Line 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 indirect 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.

Cash Match Amount	0.00000000 %	Dollar	Percentage
In Kind Amount	0.00000000 %	Dollar	Percentage

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**.

Icons

-  Print
-  Help
-  Create
-  Grant Performance Plan Report
-  Save Current View
-  Import
-  Export
-  Edit
-  Copy
-  Delete
-  Achievements

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. See the [AmpliFund User Interface Navigation Guide](#) to learn more.

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 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."
Narrative 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?"
Numeric 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.
Percent Achieved 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%.
Percent Change Goal	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.

Note

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

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** Performance 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 **Create**.

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**.

Note

If selected, any changes to the goal will be automatically reflected in the grant's budget.

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.

Icons

-  Print
-  Help
-  Save Current View
-  Export
-  Edit
-  Copy
-  Delete

Tools

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

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	Type
Public	Fold

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**.

Icons

-  Create
-  Edit
-  Select All
-  Delete
-  Show/Hide Columns

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* > *Expenses*.

For more information on expenses, see the [AmpliFund Activity Management Guide](#) or AmpliFund Administration Guide.

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**.
 - **New:** A new expense
 - **Matched:** The expense has been added both manually and imported (i.e. a potential duplicate)
 - **Reviewed:** The expense has been reviewed
 - **Payment Requested:** The expense has been invoiced to the funder
 - **Paid:** The expense has been paid by the funder

- **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

Note

If indirect expenses are system generated, they will appear automatically when an expense is added against a line item that generates indirect.

Indirect expenses are charges spent against a grant's planned indirect cost. If an expense exceeds a line item's spending alert, the Grant Manager will receive an email notification. Indirect expenses can also be imported in *Administration>Actuals>Expenses*, or system-generated.

For more information on expenses, see the [AmpliFund Activity Management Guide](#) or [AmpliFund Administration Guide](#).

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**.
 - **New:** A new expense
 - **Matched:** The expense has been added both manually and imported, a possible duplicate
 - **Reviewed:** The expense has been reviewed
 - **Payment Requested:** The expense has been invoiced to the funder
 - **Paid:** The expense has been paid by the funder
 - **Denied:** The expense has been denied by the funder

10. Add a **Description** (optional).
11. Click **Save**.

! Note

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

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**.

Icons

-  Create
-  Edit
-  Copy
-  Delete
-  Achievements
-  Calendar

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**.

Icons

-  Print
-  Help
-  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.

Note

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

How To Add a Reporting Period

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**.
8. Add **Expense** and/or **Achievements information**.
9. Click **Save**.

Note

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

How To Add an **Expenses** Reporting Period



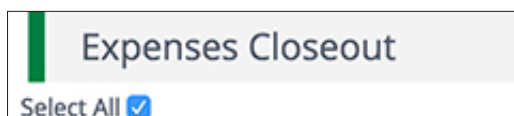
From the *Expenses* tab, you can review expense details, view expense analytics, and select expenses to close out in the reporting period. The reporting period will include all reviewed expenses for the given time period.

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.



! Note

You cannot add or edit expenses or achievements within a closed reporting period.

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

How To Add an Achievements Reporting Period



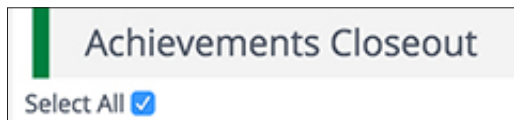
From the *Achievements* tab, you can review achievement details, view analytics, and select achievements to close out in the reporting period. The reporting period will include all achievements for the given time period.

Overall Achievements Details

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

Achievements Closeout

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



! Note

You cannot add or edit expenses or achievements within a closed reporting period.

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

How To Close a Reporting Period

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

! Note

You cannot add or edit expenses or achievements within a closed reporting period.

Icons

	Print
	Help
	Create/Add
	Edit
	Delete
	Export to PDF

Note

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

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 Detail* section.
9. Select **Payment Type**.
 - **Reimbursement:** Request payment for costs accrued
 - **Advance:** Request payment for anticipated expenses
10. Select a **Payment Request Status**.
 - **Not Submitted:** Payment request has not been submitted to the funder
 - **Submitted:** Payment request has been submitted to the funder
 - **Approved:** Payment request has been approved by the funder
 - **Rejected:** Payment request has been rejected by the funder
 - **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  (**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.

Note

Once the payment request is submitted, you can no longer edit the payment request.

Icons

	Print
	Help
	Save Current View
	Send Email
	Edit
	Add
	Remove
	Delete
	Calendar
	Activate
	Deactivate

Note

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

Warning

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

Amendments

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.

For more information on amendments, see the [AmpliFund Amendment Guide for Grant Recipients](#).

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.

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

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.

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

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 **Awarded Amount**. 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.

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.
6. To *Attach Documentation*, click **Choose File** and select a file from your computer.
7. Add any **Internal Notes** about 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.

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 Request

2. Add the proposed **Amendment Name**.
3. In the *Date Requested* field, select the **date you will submit the**

Note

If your amendment includes multiple amendment types, the *Amendment Name* and *Date Requested* fields will be the same for each type.

Note

Anything added to the *Internal Notes* field will not be visible to the funder when the amendment response is submitted.

Warning

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

Note

If your amendment includes multiple amendment types, the *Amendment Name* and *Date Requested* fields will be the same for each type.

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.
9. Click **Save** to save your progress, or click **Submit** to send your completed amendment (including all selected amendment types) to the funding organization.

Note

Anything added to the *Internal Notes* field will not be visible to the funder when the amendment response is submitted.

Warning

Once you submit your amendment, you will not be able 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

Note

If your amendment includes multiple amendment types, the *Amendment Name* and *Date Requested* fields will be the same for each type.

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.

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.

Category Budget

Categories

☐ Insurance
☐ Travel
☐ Compensation
☐ CINTAS
☐ ACE

Add New Category

Budget Categories

- 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.
- Add the **Justification** for your proposed amendment.
- To *Attach Documentation*, click **Choose a file** to select a file from your computer.
- Add any *Internal Notes* about the amendment for you or your staff to view.
- Click **Save** to save your progress, or click **Submit** to send your completed amendment (including all selected amendment types) to the funding organization.

Note

Anything added to the *Internal Notes* field will not be visible to the funder when the amendment response is submitted.

Warning

Once you submit your amendment, you will not be able 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 Performance Goal Amendment Type

- Click **Performance Goal**. If the Amendment Type is not active, click the **(Activate icon)** to activate first.

Award Duration
Awarded Amount
Category Budget
Performance Goal

Amendment Request

- In the *Amendment Name* field, enter a **name** for your proposed amendment.
- 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

Note

If your amendment includes multiple amendment types, the *Amendment Name* and *Date Requested* fields will be the same for each type.

clicked) will be recorded.

Performance Plan Goal

- 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

- 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

- In the *Justification* field, add the **justification** for your proposed amendment.
- To *Attach Documentation*, click **Choose a file** to select a file from your computer.
- In the *Internal Notes* field, add any **notes** about the amendment for you or your staff to view.
- 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.

Note

Anything added to the *Internal Notes* field will not be visible to the funder when the amendment response is submitted.

Warning

Once you submit your amendment, you will not be able 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

Appendix

Amendments FAQs

Who can add budget line items?

If the funding organization allows it, the Grant Manager and Organizational Admin can add budget line items.

Who can add expenses?

If the funding organization allows it, Grant Manager, and Organizational Admin can add expenses.

Who can add goals?

If the funding organization allows it, the Grant Manager and Organizational Admin can add goals.

Who can add achievements?

If the funding organization allows it, Grant Manager, and Organizational Admin can add achievements.

What if a funding organization changes an amendment status to Needs More Information?

If the funding organization changes the status to Needs More Information, you will have to add a new Amendment with the requested information and resubmit.

Can I track a new amendment of a received grant if the funding organization is not in AmpliFund?

No, there is no way to track the status of a new amendment if the funding organization is not in AmpliFund. You can only add approved amendments as a record.

Goal Types

Goals may be quantified using six different types. The goal types allow staff to track progress based on the planned item.

- Milestone Goals** Milestone goals are the most basic goal type. They allow for tracking progress as a “Yes” or “No” response by the responsible staff member. An example of a milestone goal is “Create and send Q1 Staff Survey.”
- Narrative Goals** Narrative goals are question and answer goals. Responsible staff members 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, staff 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, staff 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, staff 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 Goals** Reimbursement goals are goals with a discrete unit to achieve, and a dollar rate associated per unit. When tracking progress against a reimbursement goal, staff may enter Units Achieved. An optional checkbox field appears on each reimbursement goal type labeled “Add as budget item.” 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.

Security Roles

Add-on modules are indicated with an asterisk (*). For more information on each security role's access, see the [AmpliFund Security Role Matrix Guide](#).

Organizational Admin

Organizational Admin have the highest level of security and can create, view, and edit all records in the account, including Staff compensation information. Organizational Admin are the only users that can create, view, and edit records in the *Administration* module. The *Administration* module includes License Information, Account Settings, Lead and Sub-Recipients* management, Workflow* management, System Security and user management, and Lists and Actuals management and import. There is no limit to the number of Organizational Admin you can have per account.

Executives

Executives can view all records in the account, including Staff compensation information, but cannot add or edit any records. Executive users can also view the License Information section in the *Administration* module.

Implicit Security Roles

If users are designated as a Grant Manager, they will have additional security privileges on those records. They will be able to view all calendar items related to the record, and view and edit the record.