

AmpliFund 

Grants Management

Amendments for Grant Funders

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Amendments Overview

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

In addition, organizations can record amendments in AmpliFund if their corresponding recipient or funding organization is not in AmpliFund.


Icons

-  Print
-  Help
-  Add
-  View
-  Edit
-  Copy
-  Delete


Managing Amendments

How To Configure Allowable Amendment Requests

Funders can configure which amendment types can be requested and submitted by recipients on the Award Settings. These settings are inherited from *Administration > License Information > Settings*. Funders can always create any type of amendment.

1. Open **Grant Management > Grants Awarded**.
2. Click on a **grant name**.
3. Open **Post-Award tab > Settings > Grant Settings**.
4. Click the  (**Edit icon**) in the *Icon Bar*.
5. Select **Allowable Amendment Types**.
6. Click **Save**.

How To View an Amendment

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

Amendment Name	Date Created
Amendment	11/3/2016

How To View an Amendment Status


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

Amendment Name	Date Created
Amendment	11/3/2016

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

How to Delete an Amendment










Prerequisite: Amendment cannot be submitted to funder.

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

Amendment Name	Date Created
Amendment	11/3/2016

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

Icons

-  Print
-  Help
-  Save Current View
-  Send Email
-  Edit
-  Add
-  Remove
-  Delete
-  Decision

Note

You can submit a different decision for each Amendment Type.

Warning


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

Submitting a Decision on an Amendment

Prerequisite: Only Organizational Administrators, Grant Managers, or responsible individuals can submit a decision on an amendment.

1. Open **Grants Management**>**Grants Awarded**.
2. Click a **grant name**.
3. Open the **Post-Award tab**>**Management**>**Amendments**. On the *Amendments* page, any amendment that is pending a decision will have a status of *In Process* and a  (Decision icon) next to its name.

Additional Budget and goal request   10/24/2016


4. Click the  (**Decision icon**) next to the name of the amendment to review. The tabs across the top show all of the amendment types included in the amendment. There are four amendment types that may be included: [Award Duration](#), [Awarded Amount](#), [Category Budget](#), and [Performance Goal](#).
5. In the *Amendment Request Response* section, select your decision in the *Status* dropdown:
 - **Approved:** You approve the proposed amendment type, or approve an adjusted version of the amendment type
 - **Denied:** You deny the amendment type
 - **Needs More Information:** You deny the amendment type and request more information from the recipient
6. Add the information for the selected amendment type.
7. Click **Save** to save your progress or click **Submit** to send your amendment response (for all amendment types) to the recipient. Award data will be automatically updated once you submit your approval; however, you may be required to manually update some data depending on the amendment changes.

Submission Reminder

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

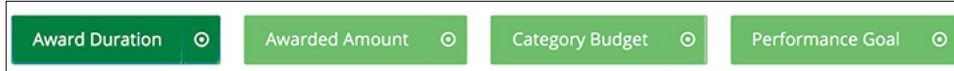
How To Submit a Decision on an **Award Duration** Amendment Type

1. Open **Grants Management**>**Grants Awarded**.
2. Click a **grant name** to select a grant.
3. Open the **Post-Award tab**>**Management**>**Amendments**.

- Click the  (**Decision icon**) next to the name of the amendment to review.



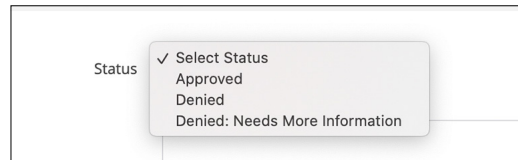
- Click **Award Duration** to review the Amendment Request.



Note

You can submit a different decision for each Amendment Type.

- Select your decision in the *Status* dropdown:
 - Approved:** You approve the proposed amendment type, or approve an adjusted version of the amendment type
 - Denied:** You deny the amendment type
 - Needs More Information:** You deny the amendment type and request more information from the recipient



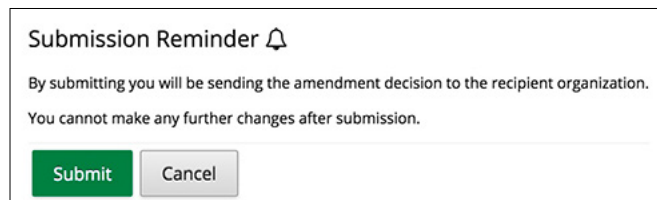
- If you approve the amendment, select the **Approved End Date** and **Approved Close Out Date**. This defaults to the *Proposed End Date* and *Proposed Closed Out Date* requested by the recipient.

- Add the **Reasoning** for your decision.

- 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 amendment response (for all amendment types) to the recipient. Once you submit your approval, the award End Date and Close Out Date will be automatically updated.




Note

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

Warning

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

How To Submit a Decision on an **Awarded Amount** Amendment Type

- Open **Grants Management > Grants Awarded**.
- Click a **grant name**.
- Open the **Post-Award tab > Management > Amendments**.
- Click the  (**Decision icon**) next to the name of the amendment to

review.

5. Click **Awarded Amount** to review the Amendment Request.

Note

You can submit a different decision for each Amendment Type.

6. Select your decision in the *Status* dropdown:

- **Approved:** You approve the proposed amendment type, or approve an adjusted version of the amendment type
- **Denied:** You deny the amendment type
- **Needs More Information:** You deny the amendment type and request more information from the recipient

7. If you approve the amendment, add the **Approved Total Awarded Amount**. This can be the same as the *Proposed Total Awarded Amount* as requested by the recipient, or it can be adjusted.

8. Add the **Reasoning** for your decision.

9. To *Attach Documentation*, click **Choose a file** to select a file from your computer.

10. Add any **Internal Notes** about the amendment for you or your staff to view.

11. Click **Save** to save your progress or click **Submit** to send your amendment response (for all amendment types) to the recipient. Once you submit your approval, the total budget will be automatically updated; however, you will need to manually update funding sources to update the Awarded Amount.

Note


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

Warning

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

How To Submit a Decision on a **Category Budget** Amendment Type

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

- Open the **Post-Award tab** > **Management** > **Amendments**.
- Click the  (**Decision icon**) next to the name of the amendment to review.



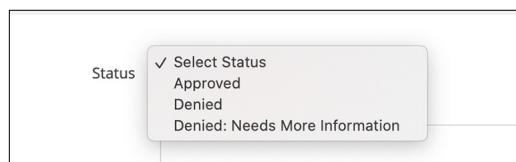
- Click **Category Budget** to review the Amendment Request.



Note

You can submit a different decision for each Amendment Type.

- Select your decision in the *Status* dropdown:
 - Approved:** You approve the proposed amendment type, or approve an adjusted version of the amendment type
 - Denied:** You deny the amendment type
 - Needs More Information:** You deny the amendment type and request more information from the recipient



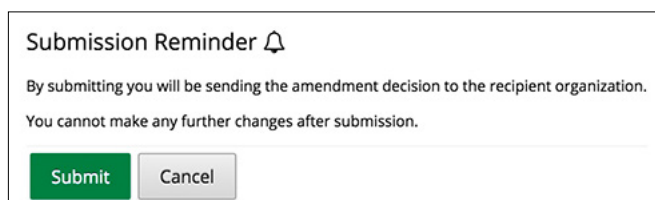
- If you approve the amendment, add the **Approved Budget Category Total**. This can be the same as the *Proposed Budget Category Total* as requested by the recipient, or it can be adjusted.
- Add the **Reasoning** for your decision.
- To *Attach Documentation*, click **Choose a file** to select a file 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 amendment response (for all amendment types) to the recipient. Once you submit your approval, the new categories will be automatically added to the award budget.

Note

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


Warning

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



How To Submit a Decision on a **Performance Goal** Amendment Type

- Open **Grants Management** > **Grants Awarded**.
- Click a **grant name**.

- Open the **Post-Award tab > Management > Amendments**.
- Click the  (**Decision icon**) next to the name of the amendment to review.



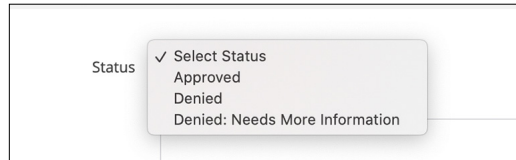
- Click **Performance Goal** to review the Amendment Request.



Note

You can submit a different decision for each Amendment Type.

- Select your decision in the *Status* dropdown:
 - Approved:** You approve the proposed amendment type, or approve an adjusted version of the amendment type
 - Denied:** You deny the amendment type
 - Needs More Information:** You deny the amendment type and request more information from the recipient



- If you approve the amendment, enter the **approved goal by goal type** in the *Approved Goals* fields. This can be the same as the proposed goals as requested by the recipient, or it can be adjusted.
- Add the **Reasoning** for your decision.
- To *Attach Documentation*, click **Choose File** and select a file from your computer.

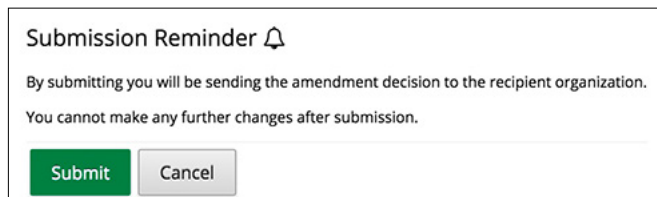
Note

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












Warning

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

- 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 amendment response (for all amendment types) to the recipient. Once you submit your approval, the new goals will be automatically added to the award performance plan.



Icons

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

Recording an Amendment to an Award

As a funding organization, you may wish to record an approved amendment in AmpliFund. The recipient will receive email notifications when any amendments are added. If you wish to record an approved amendment for a grant you have received, see [How to Add an Amendment to a Grant as a Record](#).

Amendments can have as many as four parts: [Awarded Amount](#), [Award Duration](#), [Category Budget](#), and [Performance Goal](#).

1. Open **Grants Management** > **Grants Awarded**.
2. Click a **grant name**.
3. Open the **Post-Award tab** > **Management** > **Amendments**.
4. Click the **+** (**Add icon**) in the *Icon Bar*.
5. To add an amendment type, click the (**Activate icon**) on the grayed-out tab.
6. Enter the information for the selected amendment type.
7. Click **Save** to save your progress or click **Submit** to send a notification of your completed amendment (including all selected amendment types) to the recipient. Award data will be automatically updated once you submit your amendment; however, you may be required to manually update some data depending on the amendment changes.


Warning

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

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.



2. Add the **Amendment Name**.
3. In the *Date Approved* field, select the **date the amendment was approved**. You can also select a date by clicking the  (**Calendar icon**).
4. Add the new **Approved Total Awarded Amount**. The *Current Total Awarded Amount* is listed above this field for reference.
5. Add the **Justification** for your amendment.
6. To *Attach Documentation*, click **Choose File** and select a file from your computer.

Note

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

Warning

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

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 a notification of your completed amendment (including all selected amendment types) to the recipient. Once you submit your amendment, the award End Date and Close Out Date will be automatically updated.


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.

Award Duration <input checked="" type="radio"/>	Awarded Amount <input type="radio"/>	Category Budget <input type="radio"/>	Performance Goal <input type="radio"/>
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Note

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

2. Add the **Amendment Name**.
3. In the *Date Approved* field, select the **date the amendment was approved**. You can also select a date by clicking the  (**Calendar icon**).
4. Select the **Approved End Date** and **Approved Close Out Date**. The *Current End Date* and *Current Close Out Date* are listed for reference.
5. Add the **Justification** for your amendment.
6. To *Attach Documentation*, click **Choose a file** to 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 a notification of your completed amendment (including all selected amendment types) to the recipient. Once you submit your amendment, the award End Date and Close Out Date will be automatically updated.

Warning

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


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.

Award Duration <input type="radio"/>	Awarded Amount <input type="radio"/>	Category Budget <input checked="" type="radio"/>	Performance Goal <input type="radio"/>
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Note

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

2. Add the **Amendment Name**.
3. In the *Date Approved* field, select the **date the amendment was approved**. You can also select a date by clicking the  (**Calendar icon**).
4. In the *Category Budget* section, 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.

- In the *Budget Categories* section, add the **budget amount by category** in the respective *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 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 a notification of your completed amendment (including all selected amendment types) to the recipient. Once you submit your amendment, the new categories will be automatically added to the award budget.

Warning


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

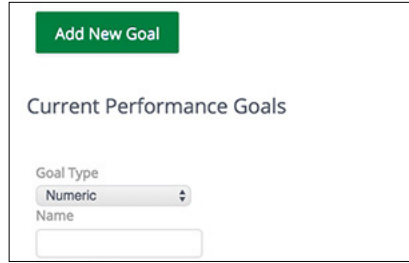
How To Add a **Performance Goal** Amendment Type

- Click **Performance Goal**. If the amendment type is not active, click the (**Activate icon**) to activate.

Note

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

- Add the **Amendment Name**.
- In the *Date Approved* field, select the **date the amendment was approved**. You can also select a date by clicking the  (**Calendar icon**).
- In the *Performance Plan Goal* section, 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.



Add New Goal

Current Performance Goals

Goal Type
Numeric

Name

- In the *Current Performance Plan Goals* section, add the **approved 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.
- Add the **Justification** for your 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 a notification of your completed amendment (including all selected amendment types) to the recipient. Once you submit your amendment, the new goals will be automatically added to the award performance plan.

Warning

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