AmpliFund

Award Management

Contents

Award Management Overview

Award Management allows users to manage fund and grant opportunities and awards in one centralized location. Awards may be created out of funds, grants, or opportunities. Awards can also be created and managed from *Grant Management* and *Fund Management*.

For clients with the Competitive Award Management module, funds may be used as funding source for an opportunity.

Award Management has the same functionality as managing opportunities and awards from *Grant Management* or *Fund Management*; there is no additional functionality in *Award Management*. For more information on how to manage fund opportunities and awards, see the **Fund Management Guide** and **Competitive Application Management Guide**. For more information on how to manage grant opportunities and awards, see the **Grant Management Guide**.

AmpliFund

Icons

🖨	Print
ℹ	Help
🔖	Save View
＋	Add
✏	Edit
🗐	Copy
🗑	Delete

Fund Opportunities

Fund opportunities can be funded by organizations, individuals, grants, and/or funds. Fund opportunities can be created from a fund record, or as a standalone opportunity in *Award Management>Fund Opportunities*.

For more information on creating, publishing, and managing opportunities, see the **Competitive Application Management Guide.**

The Fund Opportunities list shows the *Title, Opportunity Manager, Is Published, Submission Open Date, Submission Close Date, Fund Activity Category, Funding Sources,* and *Total Program Funding* columns by default. In addition, these columns are also available: *Allow Multiple Applications, Award Floor,* and *Award Ceiling*. Each of these columns may be shown or hidden, sorted, or filtered.

See the **AmpliFund User Interface Navigation Guide** to learn more about sorting and filtering list views.

How To View a Fund Opportunity

Fund opportunities can be funded by organizations, individuals, grants, and/or funds.

1. Open **Award Management>Fund Opportunities**.
2. Click a **fund opportunity**.

❗ Note

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

How To Add a Fund Opportunity

A fund opportunity is a competitive award opportunity with program funding from organizations, individuals, grants, and/or funds. Many of the fields are optional on the Opportunity form so that information can be added at a later time. However, publishing and posting an opportunity without the necessary information is not recommended.

1. Open **Award Management>Fund Opportunities**.
2. Click the **＋ (Create icon)** in the *Icon Bar*.

Opportunity Information

3. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.

> ☑ Make Viewable to Applicants

4. Add **Title**.
5. Add **Description** (optional).
6. Add **Awarding Agency Name** (optional).
7. Add **Agency Contact Name** (optional).

8. Add **Agency Contact Phone** (optional).

9. Add **Agency Contact Email** (optional).

10. Select **Fund Activity Category**. This list pulls from *Administration>Lists> Fund Activity Categories*.

11. Add **Category Explanation** or description (optional).

12. Select **Department(s)** who can view and manage the opportunity. This list pulls from *Administration>System Security>Departments* (optional).

13. Select **Subject(s)**. This list pulls from *Administration>Lists>Subjects* (optional).

14. Select an **Opportunity Manager**. This list pulls from *Contacts>Staff*. Opportunity Managers can edit Opportunity Details and create, edit, and delete all items related to their opportunity, including application forms, and budget and performance plan templates. Additionally, Opportunity Managers can enroll opportunities and applications in workflows and will receive automated emails when applications have been submitted to their opportunity.

15. Select a **Posted Date**. This is the date a published fund opportunity will be available to applicants.

16. Select an **Archive Date**. This is the date a published fund opportunity will no longer be available to applicants.

17. Select **Announcement Type**.

18. Add a **Funding Opportunity Number** (optional). This is a reference number for the opportunity assigned by your organization.

19. Add an **Agency Opportunity Number** (optional). This is a reference number for the awarding agency assigned by your organization.

20. Add an **Assistance Listings Number** (formerly CFDA Number) (optional).

21. Check the **Is Published checkbox** to publish the opportunity. A published opportunity will be available to applicants between the Posted and Archive Dates. We recommend that you only publish the opportunity after all changes to the opportunity have been made.

> Is Published ☐

> ⓘ Note
> Once the opportunity has been created, you will be able to add funding sources to the *Total Program Funding*.

Funding Information

22. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.

> ☑ Make Viewable to Applicants

23. Select **Funding Sources** (optional).

24. Add **Funding Source Description** (optional).

25. Add **Funding Restrictions** (optional).

Award Information

26. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.

☑ Make Viewable to Applicants

27. Add **Award Ceiling** (optional). This is the maximum amount a single award recipient may receive.

28. Add **Award Floor** (optional). This is the minimum amount a single award recipient may receive.

29. Select the expected **Award Start Date** (optional).

30. Select the expected **Award End Date** (optional).

31. Select the **Award Announcement Date** (optional).

32. Select the **Award Type**.

- **Competitive:** Applications will be scored in a merit-based review.
- **Non-competitive:** Applications will not be scored.

33. Select if the award is a **Capital Grant.**

34. Add the **Expected Number of Awards** (optional).

35. Select if **Indirect Costs Allowed**.

   a. If *Yes*, add **Indirect Cost Description** (optional) and **Indirect Cost Rate** (optional).

   b. Select if there are **Restrictions on Indirect Costs**. If *Yes*, add **Citation Governing Indirect Cost Restriction** (optional).

36. Select **Matching Requirement**.

   a. If *Yes*, add **Cash Match Requirement, In-Kind Match, and Other Funding Requirement** percentages (in decimal format).

Matching Requirement	Yes ⌄	☐ M
Cash Match Requirement		25.00%
In-Kind Match Requirement		
Other Funding Requirement		

Reconciliation Methods

37. Uncheck the **Make Viewable to Applicants checkbox** to hide all information in the section to applicants.

☑ Make Viewable to Applicants

38. Select **Allowable Reconciliation Methods**.

- **Advance Payment:** Grant funds are given to recipient a defined payment schedule which includes an initial advance

- **Working Capital:** Grant funds are given to recipient based on maintaining the working capital rate over the life of the grant.

- **Reimbursement:** Recipient spends own money and then requests grant funds as reimbursement

a. If *Advance Payment,* add **Suggested Initial Advance** and **Payment Schedule Instructions**.

b. If *Working Capital,* add **Suggested Initial Advance** and **Suggested Working Capital Rate**.

39. Add **Attachments** as desired. This field can be used for providing the applicant a template to fill out and upload with their application.

Submission Information

40. Uncheck the **Make Viewable to Applicants checkbox** to hide all information in the section to applicants.

☑ Make Viewable to Applicants

41. Select **Submission Timeline Type**.

- **One-Time:** Applications will only be accepted for a specified timeframe

- **Rolling:** Applications will continuously be accepted after specified date

42. Select **Submission Open Date**. This is the date and time that applications will be accepted.

43. Add **Submission Close Date** (for one-time submissions). This is the date and time that applications will no longer be accepted.

44. Select **Time Zone** for all opportunity dates and times.

45. Add **Submission Timeline Additional Information** (optional).

46. Check the **Allow Multiple Applications checkbox** to allow an organization to submit multiple applications.

47. Add the **Application Review Start Date / Pre-Qualification Deadline** (optional). This is the date applications will start being reviewed.

48. Add **Other Submission Requirements** (optional).

Question Submission Information

49. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.

☑ Make Viewable to Applicants

50. Add a **Question Submission Open Date** (optional). This is the date that applicants may start submitting questions about the opportunity.

51. Add a **Question Submission Close Date** (optional). This is the date that applicants can no longer submit questions about the opportunity.

52. Add a **Question Submission Email Address** (optional). This is the email address where applicants should submit their questions. It will appear as a link on the opportunity. The email subject will default to the opportunity's name.

53. Add **Question Submission Additional Information** (optional).

54. Add **Attachments**. This can include a summary of questions and answers for applicants to view.

Technical Assistance Session

55. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.

☑ Make Viewable to Applicants

56. Select if there will be a **Technical Assistance Session** for applicants.

    a. If *Yes*, add **Session Date and Time** (optional).

    b. Add **Conference Info / Registration Link** (optional). This will appear as a link on the opportunity.

Eligibility Information

57. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.

☑ Make Viewable to Applicants

58. Select **Eligibility Type**.

- **Public:** Opportunity appears on funder's opportunity list in the Applicant Portal

- **Private:** Opportunity does not appear on funder's opportunity list in the applicant portal and can only be accessed by URL link

59. Select **Eligible Applicants**. These are organization types that can apply to the opportunity.

60. Add **Additional Eligibility Information** (optional).
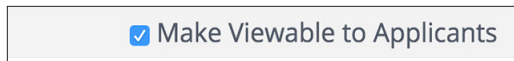
Additional Information

61. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.

☑ Make Viewable to Applicants

62. Add **Additional Information URL** (optional). This is a website link that may provide more information for applicants.

63. Add **Additional Information URL Description** (optional).

Award Administration Information

64. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.

☑ Make Viewable to Applicants

65. Add **State Award Notices, Administrative and National Policy Requirements, Reporting, State Awarding Agency Contacts,** and **Other Information** (optional).

66. Click **Create**. This will also create a Public Link that can be used to access the opportunity on the Applicant Portal. The link will only be active for applicants when the opportunity has been published.

| Public Link | https://gotomygrants.com/Public/Opportunities/details/xxxxxx-xxx-xxx-xxxxx-xx |

How To Edit a Fund Opportunity

1. Open **Award Management›Fund Opportunities**.

2. Click the ✏ **(Edit icon)** next to a fund opportunity.

Title ⌄
Public Service Funding Opportunity - Underserved Children
✏ ⎘ 🗑
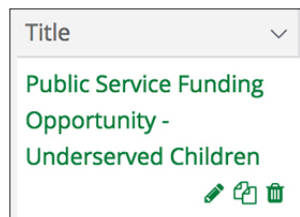
3. Update the information as necessary.

4. Click **Save**.

How To Delete a Fund Opportunity

1. Open **Award Management›Fund Opportunities**.

2. Click the 🗑 **(Delete icon)** next to a fund opportunity.

Title ⌄
Public Service Funding Opportunity - Underserved Children
✏ ⎘ 🗑
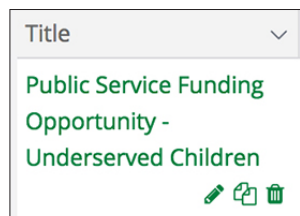
3. In the confirmation pop-up window, click **Delete**.

How To Publish a Fund Opportunity

1. Open **Award Management>Fund Opportunities**.

2. Click the ✏ **(Edit icon)** next to a fund opportunity.

Title ⌄
Public Service Funding Opportunity - Underserved Children
✏ 🗐 🗑
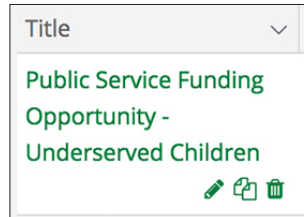
Opportunity Information

3. Check the **Is Published checkbox**.

Is Published ☐

4. In the confirmation pop-up window, click **Yes**.

Icons

🖶 Print

ℹ Help

🔖 Save View

✚ Add

✏ Edit

🗐 Copy

🗑 Delete

Grant Opportunities

Grant opportunities can be funded fully by grants only, and must be created from a grant record in *Grant Management*. Grant opportunities can be edited and deleted from the *Award Management>Grant Opportunities*.

For more information on creating, publishing, and managing opportunities, see the **Competitive Application Management Guide**.

The Grant Opportunity list shows the *Title, Opportunity Manager, Is Published, Submission Open Date, Submission Close Date, Fund Activity Category, Funding Sources,* and *Total Program Funding* columns by default. In addition, these columns are also available: *Allow Multiple Applications, Award Floor,* and *Award Ceiling.* Each of these columns may be shown or hidden, sorted, or filtered.

See the **AmpliFund User Interface Navigation Guide** to learn more about sorting and filtering list views.

How To View a Grant Opportunity

Grant opportunities can be funded fully by grants only.

1. Open **Award Management>Grant Opportunities**.
2. Click a **grant opportunity**.

⊗ Note

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

How To Add a Grant Opportunity

A grant opportunity is a competitive award opportunity with program funding a single grant. Many of the fields are optional on the Opportunity form so that information can be added at a later time. However, publishing and posting an opportunity without the necessary information is not recommended.

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

Opportunity Information

5. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.

☑ Make Viewable to Applicants

6. Add **Title**.
7. Add **Description** (optional).

8. Add **Awarding Agency Name** (optional).

9. Add **Agency Contact Name** (optional).

10. Add **Agency Contact Phone** (optional).

11. Add **Agency Contact Email** (optional).

12. Select **Fund Activity Categories**. This list pulls from *Administration>Lists> Fund Activity Categories*.

13. Add **Category Explanation** or description (optional).

14. View **Department(s)** who can view and manage the opportunity. This list pulls from *Administration>System Security>Departments*. To change the Grant Opportunity departments, update the departments on the parent grant.

15. Select **Subject(s)**. This list pulls from *Administration>Lists>Subjects* (optional).

16. Select an **Opportunity Manager**. This list pulls from *Contacts>Staff*. Opportunity Managers can edit Opportunity Details and create, edit, and delete all items related to their opportunity, including application forms, and budget and performance plan templates. Additionally, Opportunity Managers can enroll opportunities and applications in workflows and will receive automated emails when applications have been submitted to their opportunity.

17. Select a **Posted Date**. This is the date a published fund opportunity will be available to applicants.

18. Select an **Archive Date**. This is the date a published fund opportunity will no longer be available to applicants.

19. Select **Announcement Type**.

20. Add a **Funding Opportunity Number** (optional). This is a reference number for the opportunity assigned by your organization.

21. Add an **Agency Opportunity Number** (optional). This is a reference number for the awarding agency assigned by your organization.

22. Add an **Assistance Listings Number** (formerly CFDA Number) (optional).

23. Check the **Is Published checkbox** to publish the opportunity. A published opportunity will be available to applicants between the Posted and Archive Dates. We recommend that you only publish the opportunity after all changes to the opportunity have been made.

Is Published ☐

> ❗ **Note**
> The total program funding is the parent grant's post-award awarded amount This amount cannot be changed.

Funding Information

24. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.

☑ Make Viewable to Applicants

25. Select **Funding Sources** (optional).

26. Add **Funding Source Description** (optional).

27. Add **Funding Restrictions** (optional).

Award Information

28. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.

☑ Make Viewable to Applicants

29. Add **Award Ceiling** (optional). This is the maximum amount a single award recipient may receive.

30. Add **Award Floor** (optional). This is the minimum amount a single award recipient may receive.

31. Select the expected **Award Start Date** (optional).

32. Select the expected **Award End Date** (optional).

33. Select the **Award Announcement Date** (optional).

> ⓘ **Note**
> This field is informative only; it will not determine your ability to add scores to your opportunity.

34. Select the **Award Type**.

   • **Competitive:** Applications will be scored in a merit-based review.

   • **Non-competitive:** Applications will not be scored.

35. Select if the award is a **Capital Grant.**

36. Add the **Expected Number of Awards** (optional).

37. Select if **Indirect Costs Allowed**.

   a. If *Yes*, add **Indirect Cost Description** (optional) and **Indirect Cost Rate** (optional).

   b. Select if there are **Restrictions on Indirect Costs**. If *Yes*, add **Citation Governing Indirect Cost Restriction** (optional).

38. Select **Matching Requirement**.

   a. If *Yes*, add **Cash Match Requirement, In-Kind Match Requirement, and Other Grant Funding Requirement** percentages (in decimal format).

Matching Requirement	Yes ⌄	☐ M
Cash Match Requirement	25.00%	
In-Kind Match Requirement		
Other Funding Requirement		

Reconciliation Methods

> ⚠️ Note
>
> This section is only available if the **Allow Advance Payments checkbox** is checked in *Administration>License Information>Settings*.

39. Uncheck the **Make Viewable to Applicants checkbox** to hide all information in the section to applicants.

> ☑ Make Viewable to Applicants

40. Select **Allowable Reconciliation Methods**.

   • **Advance Payment:** Grant funds are given to recipient a defined payment schedule which includes an initial advance

   • **Working Capital:** Grant funds are given to recipient based on maintaining the working capital rate over the life of the grant. Includes an initial advance.

   • **Reimbursement:** Recipient spends own money and then requests grant funds as reimbursement

   a. If *Advance Payment*, add **Suggested Initial Advance** and **Payment Schedule Instructions**.

   b. If *Working Capital*, add **Suggested Initial Advance** and **Suggested Working Capital Rate**.

41. Add **Attachments** as desired. This field can be used for providing the applicant a template to fill out and upload with their application.

Submission Information

42. Uncheck the **Make Viewable to Applicants checkbox** to hide all information in the section to applicants.

> ☑ Make Viewable to Applicants

43. Select **Submission Timeline Type**.

   • **One-Time:** Applications will only be accepted for a specified timeframe

   • **Rolling:** Applications will continuously be accepted after specified date

44. Select **Submission Open Date**. This is the date and time that applications will be accepted.

45. Add **Submission Close Date** (for one-time submissions). This is the date and time that applications will no longer be accepted.

46. Select **Time Zone** for all opportunity dates and times.

47. Add **Submission Timeline Additional Information** (optional).

48. Check the **Allow Multiple Applications checkbox** to allow an organization to submit multiple applications.

49. Add the **Application Review Start Date / Pre-Qualification Deadline** (optional). This is the date applications will start being reviewed.

50. Add **Other Submission Requirements** (optional).

Question Submission Information

51. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.

☑ Make Viewable to Applicants

52. Add a **Question Submission Open Date** (optional). This is the date that applicants may start submitting questions about the opportunity.

53. Add a **Question Submission Close Date** (optional). This is the date that applicants can no longer submit questions about the opportunity.

54. Add a **Question Submission Email Address** (optional). This is the email address where applicants should submit their questions. It will appear as a link on the opportunity. The email subject will default to the opportunity's name.

55. Add **Question Submission Additional Information** (optional).

56. Add **Attachments**. This can include a summary of questions and answers for applicants to view.

Technical Assistance Session

57. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.

☑ Make Viewable to Applicants

58. Select if there will be a **Technical Assistance Session** for applicants.
    a. If *Yes*, add **Session Date and Time** (optional).
    b. Add **Conference Info / Registration Link** (optional). This will appear as a link on the opportunity.

Eligibility Information

59. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.

☑ Make Viewable to Applicants

60. Select **Eligibility Type**.
    • **Public:** Opportunity appears on funder's opportunity list in the Applicant Portal
    • **Private:** Opportunity does not appear on funder's opportunity list in the applicant portal and can only be accessed by URL link

61. Select **Eligible Applicants**. These are organization types that can apply to the opportunity.

62. Add **Additional Eligibility Information** (optional).

Additional Information

63. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.

☑ Make Viewable to Applicants

64. Add **Additional Information URL** (optional). This is a website link that may provide more information for applicants.

65. Add **Additional Information URL Description** (optional).

Award Administration Information

66. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.

☑ Make Viewable to Applicants

67. Add **State Award Notices, Administrative and National Policy Requirements, Reporting, State Awarding Agency Contacts,** and **Other Information** (optional).

68. Click **Create**. This will also create a Public Link that can be used to access the opportunity on the Applicant Portal. The link will only be active for applicants when the opportunity has been published.

Public Link   https://gotomygrants.com/Public/Opportunities/details/xxxxxx-xxx-xxx-xxxxx-xx

How To Edit a Grant Opportunity

1. Open **Award Management>Grant Opportunities**.

2. Click the ✏ **(Edit icon)** next to a grant opportunity.
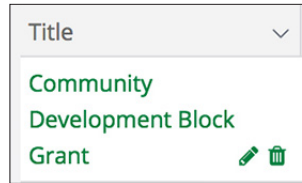
Title	⌄
Community Development Block Grant	✏ 🗑

3. Update the information as necessary.

4. Click **Save**.

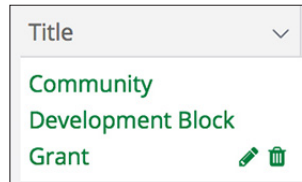# How To Delete a Grant Opportunity

1. Open **Award Management>Grant Opportunities**.

2. Click the 🗑 **(Delete icon)** next to a grant opportunity.

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

How To Publish a Grant Opportunity

1. Open **Award Management>Grant Opportunities**.

2. Click the ✏ **(Edit icon)** next to a grant opportunity.

Opportunity Information

3. Check the **Is Published checkbox**.

4. In the confirmation pop-up window, click **Yes**.

Icons

🖶 Print

ℹ Help

🔖 Save View

✚ Add

🗎 Import

💲 View Award

✏ Edit

Awards

Awards may be created from a fund opportunity (for clients with Competitive Award Management), a fund, or as a standalone award. Grant awards are created from a grant or grant opportunity.

For more information on fund awards, see the **Fund Management User Guide**.

The Awards list shows the *Lead Recipient, Total Awarded Amount, Awarded Date, Award Status, Funding Source*, and *Status* columns by default. In addition, the following columns are available: *Award Identification Number, Awarded Budget Amount, Awarded Reimbursement Amount, Description, Unique Identifier,* and *Award Name*. Each of these columns may be shown, hidden, sorted, or filtered. See the **AmpliFund User Interface Navigation Guide** to learn more about modifying AmpliFund page views.

How To View an Award

1. Open **Award Management>Awards**.
2. Click the 💲 **(View Award icon)** next to a lead recipient name.

Lead Recipient	∨	Tot
Community Service Organization	💲	$1,5

How To Add an Award

1. Open **Award Management>Awards**.
2. Click the ✚ **(Create icon)** in the *Icon Bar*.
3. In the pop-up window, select an award **Recipient**. This list pulls from *Administration>License Information>Lead Recipients*.
4. Select your organization's **Responsible Person** for the award (optional). Funder Responsible Persons are responsible for overseeing an awarded grant. These users can edit award details; performance plans, achievements and settings; and budgets, expenses, and settings. They can also view items related to their award. This list pulls from *Contacts>Staff*.
5. Select your organization's **Grant Manager**. Funder Grant Managers have full access to edit grant details, and create, edit, and delete all items related to their awarded grant. The Funder Grant Manager may also assign responsibility for goals and line items to the Recipient Grant Manager. From there, the Recipient Grant Manager can reassign responsibility to others in their organization. This list pulls from *Contacts>Staff*.
6. Add an **Award Identification Number** (optional). This a reference

number for an external system.

7. Add **Award Name** (optional). If no award name is provided, the name will default to "Recipient Name - Award."

8. Add **Awarded Date, Length of Award** in years and additional months, and **Start Date**.

9. Add a **Description** (optional).

10. Add a **Unique Identifier** (optional).

Funding Information

11. Select a **Funding Type** and **funding source**.

12. Click the **+ (Add icon)**.

Funding Information		
Funding Type	Organization ▾	
	Select organization...	
Service Funds	🗑 $10,000.00	$2,000,000.00

13. Add **Source Amount** from funding source

14. Add **Business Unit** (optional field). This field can be used as a unique identifier to track the dollars from the funding source on this award.

15. Click **Create**.

How To Edit an Award

1. Open **Award Management>Awards**.

2. Click the ⑤ **(View Award icon)** next to a lead recipient name.

Lead Recipient	⌄	To
Community Service Organization	⑤	$1,5

3. Click the ✏ **(Edit icon)** in the Icon Bar.

4. Update the information as necessary.

5. Click **Save**.

How To Import Awards

Organizational Admin and Fund Admin can import and update multiple awards using the **Awards Import Template** (recommended) or their own Excel file. The Awards Import Template includes the *Award Name, Recipient*, Responsible Person*, Grant Manager First Name*, Grant Manager Last Name*, Award Identification Number, RFP ID Number,*

Funding Opportunity Number, Assistance Listings Number, Awarded Date*, Start Date*, Grant Year One End Date*, End Date*, Close Out Date, Activity Code (NAICS or NTEE-NPC), Federal Agency and Organizational Element, Identifying Number Assigned by Federal Agency, Recipient Account Number, Payment Account Number, Description, Award Details, Eligibility Requirements, Additional Information, Funding Source Type*, Funding Source Name*, Funding Source Amount*, Cash Match Amount, In-Kind Match Amount, Other Funding Amount, Funding Opportunity, Unique Identifier, Status*, Budget Reporting Period, Due Date for Budget Items, Performance Reporting Period, Due Date for Performance Items, Financial Code, Budget Creation, Expense Creation, Performance Plan Creation, and *Achievement Creation* fields. Required fields have asterisks (*) next to their names.

1. Open **Award Management>Awards**.

2. Click the ⬆ **(Import icon)** in the *Icon Bar*.

3. In the pop-up window, click **Choose a file** to select a file from your computer.

4. Select the **Destination** field for each Source column. If you are using the **Awards Import Template** (recommended), the source and destination fields should match.

5. Click **Import**.

How To Activate an Award

Prerequisite: The Performance Plan Settings and Budget Settings must be configured.

Activating an award will send the recipient organization an invitation email to manage their award in AmpliFund.

1. Open **Award Management>Awards**.

2. Click the ⑤ **(View Award icon)** next to a lead recipient name.

3. Click the ✏ **(Edit icon)** in the Icon Bar.

4. Update information as necessary.

5. Click **Activate**.

AmpliFund

Icons

🖶 Print

ℹ Help

🔖 Save View

💼 Activate Award

✉ Resend Award Email

✏ Edit

🗑 Delete

Grant Awards

Grant awards may be created from a grant opportunity (for clients with *Competitive Award Management*) or from a grant as a sub-award. Grant awards must be created from the Grant Management module.

For more information on grant awards, see the **Grant Management Guide**.

The Grant Awards list shows the *Award Name, Recipient, Funding Source, Total Awarded Amount, Start Date, Length of Award, Status,* and *Activated* columns by default. In addition, the following columns are available: *Award Identification Number, Request for Proposal ID, Funding Opportunity ID, Assistance Listings Number, Activity Code, Awarded Date, End Date, Close Out Date, Federal Agency Identification Number, Recipient Account Number, Budget Tracking Interval, Budget Item Due Date, Performance Tracking Interval, Performance Plan Due Date, Cash Match Amount, In-Kind Match Amount, Description, Award Details, Eligibility Requirements, Additional Information,* and *Unique Identifier.* Each of these columns may be shown, hidden, sorted, or filtered. See the **AmpliFund User Interface Navigation Guide** to learn more about modifying AmpliFund page views.

How To View a Grant Award

1. Open **Award Management>Grant Awards**.

2. Click the **award name**.

How To Edit a Grant Award

1. Open **Award Management>Grant Awards**.

2. Click an **award name**.

3. Click the ✏ **(Edit icon)** in the Icon Bar.

4. Update the information as necessary.

5. Click **Save**.
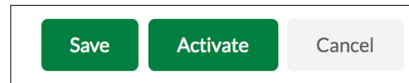
How To Delete a Grant Award

1. Open **Award Management>Grant Awards**.

2. Click an **award name**.

3. Click the 🗑 **(Delete icon)** in the Icon Bar.

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

How To Activate a Grant Award

Prerequisite: The Performance Plan Settings and Budget Settings must be configured.

Activating an award will send the recipient organization an invitation email to manage their award in AmpliFund.

1. Open **Award Management>Grant Awards**.

2. Click an **award name**.

3. Click the ✎ **(Edit icon)** in the Icon Bar.

4. Update the information as necessary.

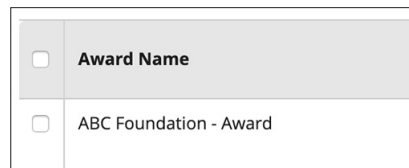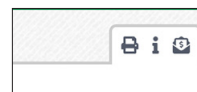5. Click **Activate**.

How To Activate Multiple Grant Awards

Activating an award will send the recipient organization an invitation email to manage their award in AmpliFund.

1. Open **Award Management>Grant Awards**.

2. Click the ⟳ **(Activate Award icon)** in the *Icon Bar*.

3. Select awards or check the **select all checkbox column**.

4. Click the ⟳ **(Activate Award icon)** in the *Icon Bar*.

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

Post-Award Management

The Post-Award section of the award record allows funders to manage the award through closeout. Funders can set requirements for and track award performance, budget, payments, amendments, and periodic reporting.

AmpliFund

Icons

🖶	Print
ℹ	Help
📊	Grant Budget Variance Report
🔽	Import
🔼	Export
+	Add
✏	Edit
🗐	Copy
🗑	Delete
🗎	Add Amendment
$	Expenses
🔒	Locked
↔	Spread Evenly
◆	Clear

Financial

The Financial section of the Post-Award tab includes the award's planned budget and expenses. A award's budget tracks actual expenses against planned expenditures throughout the life of the grant. Grant budgets can include match; indirect; personnel, non-personnel, and benefit line items; and multiple grant years.

Budgets show the budget categories, grant-funded amounts, total costs, and total revenue by default. Additionally, grant years, line items, Responsible Individuals, GL accounts, actuals, and remaining amounts can be shown or hidden. As actuals are added against the budget, they can be displayed and filtered by expense date. This includes any Closed, Reviewed, Payment Requested, or Paid expenses.

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 Configure Award Budget Settings

1. Open **Award Management>Awards**.
2. Click the ⊚ **(View Award icon)** next to a lead recipient name.
3. Open the **Post-Award tab>Settings>Budget Settings**.
4. Click the ✏ **(Edit icon)** in the *Icon Bar*.

Recipient Settings

5. Select **Budget Creation Permissions**. This controls who (funder and/or recipient) can create budget categories and line items.
6. Select **Expense Creation Permissions**. This controls who (funder and/or recipient) can create expenses.

Matching

7. Select the default **Match** requirements. These can also be set on the category or line item.
    -   **Disable:** match will not be tracked on budget categories or line items
    -   **Enable:** match may be tracked on budget categories or line items
    -   **Require:** cash match will always be tracked on budget categories and line items
8. Select **Use Match Percentage As**.
    -   **Percentage of Total Grant Budget:** calculates match as percent of

total budget, including grant-funded and match (i.e., 50% match of $150,000 total budget = $75,000)

- **Percentage of Grant-Funded Amount:** calculates match as percent of grant-funded amount only (i.e., 50% match of $150,000 total budget = $50,000)

9. Select **Default Cash Match**. This is the amount or percent that will be inherited by budget categories and line items.

   a. If *Percentage* is selected, add the **Cash Match Percent** (in decimal format).

   b. If *Amount* is selected, add the **Cash Match Amount**.

10. Select **Default In-Kind Match Personnel**. This is the amount or percent that will be inherited by personnel line items.

    a. If *Percentage* is selected, add the **Cash Match Percent** (in decimal format).

    b. If *Amount* is selected, add the **Cash Match Amount**.

11. Select **Default In-Kind Match Non-Personnel**. This is the amount or percent that will be inherited by non-personnel line items.

    a. If *Percentage* is selected, add the **Cash Match Percent** (in decimal format).

    b. If *Amount* is selected, add the **Cash Match Amount**.

12. Select **Default Other Funding**. This is the amount or percent that will be inherited by budget categories and line items.

    a. If *Percentage* is selected, add the **Other Funding Percent** (in decimal format).

    b. If *Amount* is selected, add the **Other Funding Amount**.

Indirect

13. Check the **Track Indirect Cost checkbox**. If checked, an indirect cost category will appear in the grant's Expense Budget which cannot be edited.
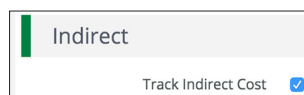
14. Select a **Rate Type**.

15. Add the **Indirect Rate** (in decimal format).

16. Select the **Start Date** and **End Date**.

17. Click the **+ (Add icon)** to add additional indirect cost rates.

Grant Date Range	7/1/2016 to 6/30/2021			
Indirect Rate Table	Type	Rate	Start Date	End Date
	Provisional ▾	10.00 %	7/1/2016 📅	6/29/2017 📅 ➕
	Final ▾	5.00 %	6/30/2017 📅	6/30/2021 📅 ➕ 🗑

18. If Match is enabled, select the how indirect should be calculated on the *Calculate Indirect By* field.

    • **Direct Cost:** Match is included when calculating indirect

    • **Grant-Funded Amount:** Match is excluded when calculating indirect

19. On the *Add Indirect Expenses By* field, select how indirect expenses will be added by default.

    • **System Generated:** Indirect expenses will be automatically created when expenses are added against line items that generate indirect.

    • **Manual Entry or Import:** Indirect expenses will be added or imported by users.

> **❗ Note**
> Depending your account settings, this section may not be available.

Reconciliation Methods

20. Select from the available **Allowable Reconciliation Methods**.

    • **Advance Payment:** Grant funds are given to recipient a defined payment schedule which includes an initial advance

    • **Working Capital:** Grant funds are given to recipient based on maintaining the working capital rate over the life of the grant. Includes an initial advance.

    • **Reimbursement:** Recipient spends own money and then requests grant funds as reimbursement

    a. If *Advance Payment*, add **Initial Advance**.

    b. If *Working Capital*, add **Initial Advance** and **Working Capital Rate**.

> **❗ Note**
> This section is only available when **Advance Payment** is selected.

Payment Schedule

21. Add **monthly payment schedule** for the award. The ending balance must be $0.00 at the end of the grant.

Categories

> **❗ Note**
> Federal budget categories are predefined and cannot be edited.

22. Select **Budget Categories** to be available on the budget. This list pulls from *Administration>Lists>Budget Categories.*

23. Click **Add**.

Categories		
Budget Categories	All Federal Categories ▾	Add

Benefits

24. Select how to **Add Benefits By**.

   • **Personnel:** benefits are planned per employee and will use staff compensation data on personnel line items

   • **Benefit Type:** benefits are planned as separate line items for all grant-funded positions

25. Select a **Supported Benefit Type**. This list pulls from *Administration>Lists> Benefit Types*.

26. Click **Add**.

Benefits

Add Benefits By ?	Personnel ▼
Supported Benefit Type ?	FICA Rate Benefit ▼ [Add]

27. Click **Save**.

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

How To Add a Category to Award Budget

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

Prerequisite: Funder can edit on **Budget Creation Permissions** in the award's *Budget Settings*.

1. Open **Award Management>Awards**.

2. Click the ⊙ **(View Award icon)** next to a lead recipient name.

3. Open the **Post-Award tab>Financial>Budget**.

> **⊙ Note**
>
> Line items within the budget category will inherit its settings. The indirect and match settings must be configured in Budget Settings in order for category values to calculate.

4. Click the **+ (Add icon)** next to *Expense Budget*.

Budget

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*.

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 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

❗ Note

Line items within a locked category can be edited. Locked categories may be unlocked by Organizational Admin or the Grant Manager.

10. Click **Lock** to prevent line items being added to the category or the category being edited (optional).
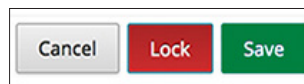
11. Click **Create**.

How To Edit a Category on Award Budget

Prerequisite: Funder can edit on **Budget Creation Permissions** in the award's *Budget Settings*.

1. Open **Award Management>Awards**.
2. Click the ⑤ **(View Award icon)** next to a lead recipient name.
3. Open the **Post-Award tab>Financial>Budget**.
4. Click the ✏ **(Edit icon)** next to a category name.

5. Update the information as necessary.

6. Click **Save**.

How To Delete a Category on Award Budget

Prerequisite: Funder can edit on **Budget Creation Permissions** in the award's *Budget Settings*.

1. Open **Award Management›Awards**.

2. Click the ⊛ **(View Award icon)** next to a lead recipient name.

3. Open the **Post-Award tab›Financial›Budget**.

4. Click the 🗑 **(Delete icon)** next to a category name.

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

6. Click **Save**.

❗ Note

Line items within a locked category can be edited. Locked categories may be unlocked by Organizational Admin or the Grant Manager.

How To Add an Award Budget Line Item

Budget line items are the planned expenses related to a grant and contain information such as associated GL accounts, responsible individuals, and attachments. Line items can be within a category or uncategorized.

There are three line items types: Personnel, Non-Personnel, and Benefit Type line items. Personnel line items are budgeted staff compensation expenses. Non-personnel line items are budgeted expenses that do not fund staff compensation. Benefit Type line items are planned benefit expenses for all grant-funded staff. Benefit Type line items are only available if benefits are not tracked within personnel line items in the **Budget Settings**.

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. In the *General tab* of the pop-up window, select the **Item Type**. This can be **Personnel**, **Non-Personnel**, or **Benefit Type**.

6. Add line item information.

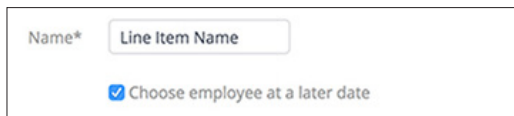7. Click **Lock** to prevent line items being added to the category or the category being edited (optional).
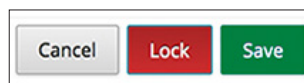
8. Click **Create**.

How To Add an Award **Personnel** Budget Line Item

Personnel line items are budgeted staff compensation expenses. For more information about compensation history, see the **AmpliFund Contact Management Guide**.

1. Open **Award Management>Awards**.

2. Click the ⊛ **(View Award icon)** next to a lead recipient name.

3. Open the **Post-Award tab>Financial>Budget**.

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

5. In the *General tab* of the pop-up window, select **Personnel** from the *Item Type* dropdown.

6. Select the **Category**.

7. Select the **Employee** name. This list pulls from the recipient's *Contacts>Staff*.

   a. If the employee is unknown, check the **Choose employee at later date checkbox**.

   b. Add a line item **Name**.

8. Add the **Position** (optional).

9. Add the amount of funded **Salary**.

10. Add **Benefits** and **Direct Cost** (optional).

11. 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*.

12. 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*.

13. Select the **Responsible Individual**. This list pulls from *Contacts>Staff*.

14. Add a **Description** (optional).

15. Click **Lock** to prevent line item from being edited (optional).

16. Click **Create**.

How To Add an Award **Non-Personnel** Budget Line Item

Non-personnel line items are budgeted expenses that do not fund staff salary or staff benefits.

1. Open **Award Management>Awards**.

2. Click the ⑤ **(View Award icon)** next to a lead recipient name.

3. Open the **Post-Award tab>Financial>Budget**.

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

5. In the *General tab* of the pop-up window, select **Non-Personnel** from the *Item Type* dropdown.

6. Add a line item **Name**.

7. Add the **Direct Cost**.

8. 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*.

9. 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*.

10. Select the **Responsible Individual**. This list pulls from *Contacts>Staff*.

11. Add a **Description** (optional).

12. Click **Lock** to prevent line item from being edited (optional).
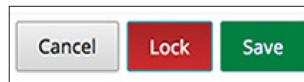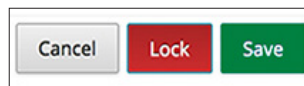

13. Click **Create**.

How To Add an Award **Benefit Type** Budget Line Item

Benefit Type line items are planned benefit expenses for all grant-funded staff.

Prerequisites: Benefit Types are added in the **Budget Settings** and benefit items are not budgeted per each grant-funded employee

1. Open **Award Management>Awards**.

2. Click the ⑤ **(View Award icon)** next to a lead recipient name.

3. Open the **Post-Award tab>Financial>Budget**.

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

5. In the *General tab* of the pop-up window, select **Benefit Type** from the *Item Type* dropdown.

6. Select a **Benefit Type**.

7. Add the **Direct Cost**.

8. 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*.

9. 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*.

10. Select the **Responsible Individual**. This list pulls from *Contacts>Staff*.

11. Add a **Description** (optional).

12. Click **Lock** to prevent line item from being edited (optional).

13. Click **Create**.

How To Add Financial Information to an Award Budget Line Item

The *Financials tab* allows users to add more detail to the direct cost and matching planned amounts, and to associate GL accounts with the line item. Users may allocate line items across grant years or months. Line items are allocated evenly by month across the line item life unless unevenly spread.

1. Open **Award Management>Awards**.

2. Click the ⊛ **(View Award icon)** next to a lead recipient 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 **Financials tab**.

6. Add the **Cash Match Amount** and **In-Kind Match Amount** in dollars or percentages.

7. Select a **GL account**. This list pulls from *Administration>Lists>GL Accounts*.

8. Click **Add**. You can add multiple GL accounts if necessary.

9. Select if you wish to view your allocations **Yearly** or **Monthly**.

10. Add **allocation amounts**. Click the ⬕ **(Clear icon)** to remove all selections. Click the ↔ **(Spread Evenly icon)** to spread amounts equally over the grant's months.

Grant Year	Start Year	Amount
✐ ↔		

11. Click **Save**.

How To Add Benefits Information to an Award Personnel Budget Line Item

Prerequisites: Must be a personnel line item where benefits are planned on a per-staff member basis. Benefit type must be added in the grant's budget settings.

1. Open **Award Management>Awards**.

2. Click the ⑂ **(View Award icon)** next to a lead recipient name.

3. Open the **Post-Award tab>Financial>Budget**.

4. Click the ✐ **(Edit icon)** next to a line item.

Marketing Materials ✐ 🗑 ⧉

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

6. Select the **Supported Benefit Type**. This list pulls from the *Post-Award tab>Settings>Budget Settings*.

7. Click **Add**. You can add multiple benefit types if necessary.

8. Add the benefit **Amount** in dollars or percentages.

9. Check **Exclude From Match** and **Exclude From Indirect checkboxes** as necessary.

10. Click **Save**.

How To Add an Expense Cap to an Award Budget Line Item

Category and line item expense caps are independent of each other, and can be created on a per-line item basis.

1. Open **Award Management>Awards**.

2. Click the ⑂ **(View Award icon)** next to a lead recipient 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 **Configuration tab**.

Expense Cap

6. Check the **Expense Cap checkbox** to enable expense cap. This will

prevent expenses within a line item from exceeding the capped amount.

7. Add the **Expense Cap Amount**. Expenses cannot exceed this amount for the line item.

8. Click **Save**.

How To Add Spending Alerts to an Award Budget Line Item

Category and line item spending alerts are independent of each other, and can be created on a per-line item basis. Spending alerts will notify the Grant Manager if a line item is under- or overspent for the monthly allocation or throughout the life of the grant.

1. Open **Award Management>Awards**.

2. Click the ⑤ **(View Award icon)** next to a lead recipient 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 **Configuration tab**.

Spending Alerts

6. Check the **Monthly Spending Alerts checkbox** to enable monthly spending alerts. Spending alerts will notify the Grant Manager if a line item is under- or overspent for monthly allocation.

   a. Add **Under Monthly Allocations** amount in dollars or percentage.

   b. Add **Over Monthly Allocations** amount in dollars or percentage.

Under the monthly allocated budget by more than	0.00 %	Dollar	Percentage	ⓘ
Over the monthly allocated budget by more than	0.00 %	Dollar	Percentage	ⓘ

7. Check the **Total Spending Alerts checkbox** to enable spending alerts for the life of the grant. Spending alerts will notify the Grant Manager if a line item is within a designated percentage of the total line item budget.

   a. Add **Percentage of Direct Cost**.

Send weekly alerts when total spending for this line item is...	
Within X percentage of total line item budget	0.00 %

8. Click **Save**.

How To Add an Attachment to an Award Budget Line Item

1. Open **Award Management>Awards**.
2. Click the 💲 **(View Award icon)** next to a lead recipient 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**.

How To Unlock an Award Budget Line Item

Prerequisite: Must be Organizational Administrator or Grant Manager

1. Open **Award Management>Awards**.
2. Click the 💲 **(View Award icon)** next to a lead recipient name.
3. Open the **Post-Award tab>Financial>Budget**.
4. Click the ✏️ **(Edit icon)** next to a locked line item.

5. In the pop-up window, click **Unlock**.
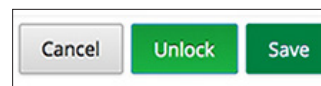
6. Click **Save**.

How To Edit an Award Budget Line Item

Prerequisite: Funder can edit on **Budget Creation Permissions** in the award's *Budget Settings*.

1. Open **Award Management>Awards**.
2. Click the 💲 **(View Award icon)** next to a lead recipient name.
3. Open the **Post-Award tab>Financial>Budget**.
4. Click the ✏️ **(Edit icon)** next to a line item.

5. Update the information as necessary.

6. Click **Save**.

How To Delete an Award Budget Line Item

Prerequisite: Funder can edit on **Budget Creation Permissions** in the award's *Budget Settings*.

1. Open **Award Management›Awards**.
2. Click the ⑤ **(View Award icon)** next to a lead recipient name.
3. Open the **Post-Award tab›Financial›Budget**.
4. Click the 🗑 **(Delete icon)** next to a line item.

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

How To Add Indirect to an Award Budget

Indirect, or overhead, calculates and tracks costs associated indirectly with the grant. On the budget, indirect is system calculated only; the amount cannot be edited by the user. Indirect cost is calculated as the indirect rate of allocations of budget line items that generate indirect. Indirect will appear as a locked category with an Indirect Cost line item.

1. Open **Award Management›Awards**.
2. Click the ⑤ **(View Award icon)** next to a lead recipient name.
3. Open the **Post-Award tab›Settings›Budget Settings**.
4. Click the ✎ **(Edit icon)** in the *Icon Bar*.
5. In the *Indirect* section, check the **Track Indirect Cost checkbox**. If checked, an indirect cost category will appear in the grant's Expense Budget which cannot be edited.

6. Select a **Rate Type**.
7. Add the **Indirect Rate** (in decimal format).
8. Select the **Start Date** and **End Date**.
9. Click the ✚ **(Add icon)** to add additional indirect cost rates.

Grant Date Range	7/1/2016 to 6/30/2021				
Indirect Rate Table	Type	Rate	Start Date	End Date	
	Provisional ▾	10.00 %	7/1/2016 📅	6/29/2017 📅	✚
	Final ▾	5.00 %	6/30/2017 📅	6/30/2021 📅	✚🗑

10. If Match is enabled, select the how indirect should be calculated on the *Calculate Indirect By* field.

   - **Direct Cost:** Match is included when calculating indirect
   - **Grant-Funded Amount:** Match is excluded when calculating indirect

11. On the *Add Indirect Expenses By* field, select how indirect expenses will be added by default.

   - **System Generated:** Indirect expenses will be automatically created when expenses are added against line items that generate indirect.
   - **Manual Entry or Import:** Indirect expenses will be added or imported by users.

12. Open the **Post-Award tab>Financial>Budget**.

13. Click the ✏ **(Edit icon)** next to a line item within a category that has indirect cost enabled.

Travel ➕ 🗑 ✏	
Airfare ✏ 🗑 ⧉	$50,000.00
Subtotal	$50,000.00

14. In the pop-up window, open the **Configuration tab**.

15. Check the **Generates Indirect checkbox**. The generated indirect amount will be added to the *Indirect Cost* line item.

General	Financials	Configuration	Attachments
	☑ Generates Indirect		

How To Import Award Budget Line Items

Organizational Administrators and Grant Managers can import multiple budget line items using the **Budget Import Template Budget Import Template** (recommended) or their own Excel file. The Budget Import Template includes the Grant ID, Line Item Type*, Budget Category*, Benefit Type, Name*, Description, GL Account ID, GL Name, GL Code, Class 1, Class 2, Class 3, Responsible Staff*, Direct Cost*, Project Line Item, Exclude From Match, Exclude From Indirect, Cash Match Value, Cash Match Type, In-Kind Match Value, In-Kind Match Type, Personnel Staff, and Personnel Title fields. Required fields have asterisks (*) next to their names.

Prerequisite: Funder can edit on **Budget Creation Permissions** in the award's *Budget Settings*.

1. Open **Award Management>Awards**.

2. Click the 💲 **(View Award icon)** next to a lead recipient name.

3. Open the **Post-Award tab>Financial>Budget**.

4. Click the ⬐ **(Import icon)** in the *Icon Bar*.

5. In the pop-up window, click **Choose a file** to select a file from your computer.

6. Select the **Destination** field for each Source column. If you are using the **Budget Import Template Budget Import Template** (recommended), the source and destination fields should match.

7. Click **Import**.

AmpliFund

Icons

🖶   Print

ℹ   Help

✚   Create

📊   Grant Performance Plan Report

🔖   Save Current View

↗   Import

📤   Export

✏   Edit

🗐   Copy

🗑   Delete

🏆   Achievements

Performance

An award's performance is measured by achievements against programmatic goals. If achievements are not meeting their given goal allocations, the award's performance risk may be impacted.

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.

How To Configure Award Performance Settings

1. Open **Award Management>Awards**.
2. Click the 💲 **(View Award icon)** next to a lead recipient name.
3. Open the **Post-Award tab>Settings>Performance Plan Settings**.

Recipient Settings

4. Select **Performance Plan Creation**. This controls who (funder and/or recipient) can create performance strategies and goals.
5. Select **Achievement Creation**. This controls who (funder and/or recipient) can create achievements.

Goal Types

6. Select which goal types can be used in the award's performance plan.
7. Click **Save**.

How To Add an Award Performance Goal

⊘ Note

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

When creating a new goal, the fields may vary depending on the goal type. For an extensive description of goal types, see **Goal Types**

Prerequisite: Must be Organizational Administrator or Grant Manager. Funder can edit on **Performance Plan Creation** in the award's *Performance Plan Settings*.

1. Open **Award Management>Awards**.
2. Click the 💲 **(View Award icon)** next to a lead recipient name.
3. Open the **Post-Award tab>Performance>Performance Plan**.
4. Click the ✚ **(Create icon)** in the *Icon Bar*.
5. In the pop-up window, select a **Strategy** (optional). This will link the

goal to an existing strategy.

6. Select a **Goal Type**. This could be **Milestone**, **Narrative**, **Numeric**, **Percent Achieved**, **Percent Changed**, or **Reimbursement**.

7. Add the goal information.

8. Click **Save**.

How To Add an Award **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 **Award Management>Awards**.

2. Click the ⑤ **(View Award icon)** next to a lead recipient name.

3. Open the **Post-Award tab>Performance>Performance Plan**.

4. Click the ✚ **(Create icon)** in the *Icon Bar*.

5. In the pop-up window, select a **Strategy** (optional). This will link the goal to an existing strategy.

6. In the *Goal Type* dropdown, select **Milestone**.

7. Add the goal **Name**.

8. Add the goal **Description** (optional).

9. Select the **Responsible Individual**. This list pulls from the recipient's *Contacts>Staff.* The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.

10. Select a goal **Due Date**.

11. Click **Create**.

How To Add an Award **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 **Award Management>Awards**.

2. Click the ⑤ **(View Award icon)** next to a lead recipient name.

3. Open the **Post-Award tab>Performance>Performance Plan**.

4. Click the ✚ **(Create icon)** in the *Icon Bar*.

5. In the pop-up window, select a **Strategy** (optional). This will link the goal to an existing strategy.

6. In the *Goal Type* dropdown, select **Narrative**.

7. Add the goal **Name**.

8. Add the goal **Description** (optional).

9. Select the **Responsible Individual**. This list pulls from the recipient's *Contacts>Staff.* The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.

10. Add the **Question** that the goal will answer.

11. Click **Create**.

How To Add an Award **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 **Award Management>Awards**.

2. Click the ⊛ **(View Award icon)** next to a lead recipient name.

3. Open the **Post-Award tab>Performance>Performance Plan**.

4. Click the **+ (Create icon)** in the *Icon Bar*.

5. In the pop-up window, select a **Strategy** (optional). This will link the goal to an existing strategy.

6. In the *Goal Type* dropdown, select **Numeric**.

7. Add the goal **Name**.

8. Add the goal **Description** (optional).

9. Select the **Responsible Individual**. This list pulls from the recipient's *Contacts>Staff.* The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.

10. Add the **Number To Be Achieved**.

11. Click **Create**.

How To Add an Award **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 **Award Management>Awards**.

2. Click the ⊛ **(View Award icon)** next to a lead recipient name.

3. Open the **Post-Award tab>Performance>Performance Plan**.

4. Click the **+ (Create icon)** in the *Icon Bar*.

5. In the pop-up window, select a **Strategy** (optional). This will link the goal to an existing strategy.

6. In the *Goal Type* dropdown, select **Percent Achieved**.

7. Add the goal **Name**.

8. Add the goal **Description** (optional).

9. Select the **Responsible Individual**. This list pulls from the recipient's *Contacts>Staff.* The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.

10. Add the **Percent Desired**.

11. Click **Create**.

How To Add an Award **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 **Award Management>Awards**.

2. Click the ⊛ **(View Award icon)** next to a lead recipient name.

3. Open the **Post-Award tab>Performance>Performance Plan**.

4. Click the **+ (Create icon)** in the *Icon Bar*.

5. In the pop-up window, select a **Strategy** (optional). This will link the goal to an existing strategy.

6. In the *Goal Type* dropdown, select **Percent Changed**.

7. Add the goal **Name**.

8. Add the goal **Description** (optional).

9. Select the **Responsible Individual**. This list pulls from the recipient's *Contacts>Staff.* The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.

10. Add the **Current Percent** and **Percent Desired**.

11. Click **Create**.

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

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

How To Add Allocations to an Award Performance Goal

Narrative, Numeric, Percent Achieved, Percent Changed, and Reimbursement goals allow you to add allocations. Allocations help you plan your goals by year or month.
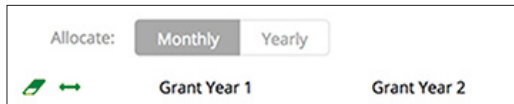
1. Open **Award Management>Awards**.
2. Click the 💲 **(View Award icon)** next to a lead recipient name.
3. Open the **Post-Award tab>Performance>Performance Plan**.
4. Click the ✏️ **(Edit icon)** next to a goal name.
5. In the pop-up window, open the **Allocations tab**.

6. Select if you wish to view your allocations **Yearly** or **Monthly**.

7. Add **allocation amounts**. Click the ◭ **(Clear icon)** to remove all selections. Click the ↔ **(Spread Evenly icon)** to spread amounts equally over the grant's months.

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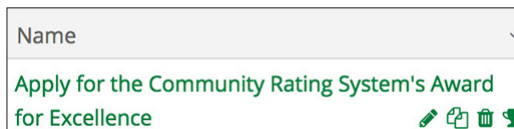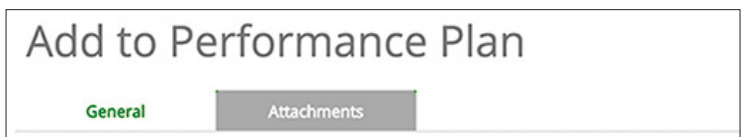

8. Click **Save**.

How To Add an Attachment to an Award Performance Goal

All goals allow you to add an attachment.

1. Open **Award Management>Awards**.

2. Click the ⊛ **(View Award icon)** next to a lead recipient name.

3. Open the **Post-Award tab>Performance>Performance Plan**.

4. Click the ✎ **(Edit icon)** next to a goal name.

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 files (optional).

8. Click **Save**.

> **Note**
> Once a goal has been created with a specific goal type selected, the goal type cannot be changed.

How To Edit an Award Performance Goal

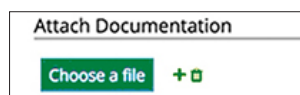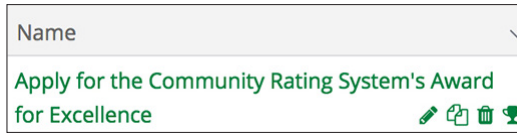Prerequisite: Funder can edit on **Performance Plan Creation** in the award's *Performance Plan Settings*.

1. Open **Award Management›Awards**.

2. Click the 💲 **(View Award icon)** next to a lead recipient name.

3. Open the **Post-Award tab›Performance›Performance Plan**.

4. Click the ✏️ **(Edit icon)** next to a goal name.

Name	⌄
Apply for the Community Rating System's Award for Excellence	✏️ 🗐 🗑 🏆

5. Update the information as necessary.

6. Click **Save**.

How To Copy an Award Performance Goal

Prerequisite: Funder can edit on **Performance Plan Creation** in the award's *Performance Plan Settings*.

1. Open **Award Management›Awards**.

2. Click the 💲 **(View Award icon)** next to a lead recipient name.

3. Open the **Post-Award tab›Performance›Performance Plan**.

4. Click the 🗐 **(Copy icon)** next to a goal name.

Name	⌄
Apply for the Community Rating System's Award for Excellence	✏️ 🗐 🗑 🏆

5. Update the information as necessary.

6. Click **Save**.

How To Delete an Award Performance Goal

Prerequisite: Funder can edit on **Performance Plan Creation** in the award's *Performance Plan Settings*.

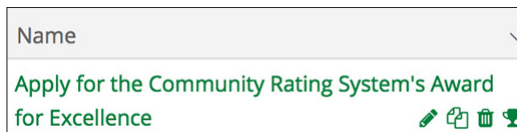1. Open **Award Management›Awards**.

2. Click the 💲 **(View Award icon)** next to a lead recipient name.

3. Open the **Post-Award tab›Performance›Performance Plan**.

4. Click the 🗑 **(Delete icon)** next to a goal name.

Name	⌄
Apply for the Community Rating System's Award for Excellence	✏️ 🗐 🗑 🏆
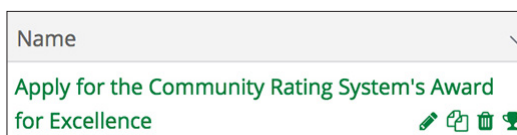
5.   In the pop-up confirmation window, click **Delete**.

How To Import Award Performance Goals

Users can import multiple goals using the **Performance Plan Import Template** (recommended) or their own Excel file. The Performance Plan Import Template includes the Grant, Goal Unique ID, Goal Type*, Name*, Description, Individual*, Question, Number To Be Achieved, Current Percentage, Desired Percentage, Rate Per Unit, Due Date, and Add as Budget Line Item fields. Required fields have asterisks (*) next to their names.

Prerequisite: Must be Organizational Administrator or Grant Manager. Funder can edit on **Performance Plan Creation** in the award's *Performance Plan Settings*.

1.   Open **Award Management>Awards**.

2.   Click the ⊛ **(View Award icon)** next to a lead recipient name.

3.   Open the **Post-Award tab>Performance>Performance Plan**.

4.   Click the 🖅 **(Import icon)** in the *Icon Bar*.

5.   In the pop-up window, click **Choose a file** to select a file from your computer.

6.   Select the **Destination** field for each Source column. If you are using the **Performance Plan Import Template** (recommended), the source and destination fields should match.

7.   Click **Import**.

How To Add an Award Performance Strategy

Strategies link related goals together.

Prerequisite: Funder can edit on **Performance Plan Creation** in the award's *Performance Plan Settings*.

1.   Open **Award Management>Awards**.

2.   Click the ⊛ **(View Award icon)** next to a lead recipient name.

3.   Open the **Post-Award tab>Performance>Performance Strategies**.

4.   Click the ✚ **(Create icon)** in the *Icon Bar*.

5.   In the pop-up window, add a strategy **Name**.

6.   Add a **Description** (optional).

7.   Click **Create**.

How To Edit an Award Performance Strategy

After strategies have been added, the name and description may be edited.

Prerequisite: Funder can edit on **Performance Plan Creation** in the award's *Performance Plan Settings*.

1. Open **Award Management>Awards**.
2. Click the ⊛ **(View Award icon)** next to a lead recipient name.
3. Open the **Post-Award tab>Performance>Performance Strategies**.
4. Click the ✏ **(Edit icon)** next to a strategy name.

Name	⌄	D
Health Education		✏ 🗑

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

How To Delete an Award Performance Strategy

Prerequisite: Strategy cannot be linked to a performance goal. Funder can edit on **Performance Plan Creation** in the award's *Performance Plan Settings*.

1. Open **Award Management>Awards**.
2. Click the ⊛ **(View Award icon)** next to a lead recipient name.
3. Open the **Post-Award tab>Performance>Performance Strategies**.
4. Click the 🗑 **(Delete icon)** next to a strategy name.

Name	⌄	D
Health Education		✏ 🗑

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

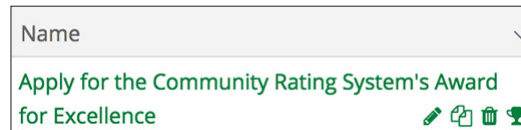## How To Link an Award Performance Strategy to a Goal

1. Open **Award Management>Awards**.
2. Click the ⊛ **(View Award icon)** next to a lead recipient name.
3. Open the **Post-Award tab>Performance>Performance Plan**.
4. Click the ✏ **(Edit icon)** next to a goal name.

5. In the pop-up window, select a **Strategy** (optional). This will link the goal to an existing strategy.

6. Click **Save**.

AmpliFund

Icons

🖨 Print

ℹ Help

✚ Create

✏ Edit

🗑 Delete

📄 Export to PDF

Cash Flow

The Cash Flow section of the Post-Award tab holds payment requests and payment authorizations. Payment requests allow grant recipients to invoice grant funding organizations for expenses accrued (reimbursement) or anticipated (cash advance) during the life of the award. Payment requests are submitted directly from the recipient for review and approval. Funders can create payment authorizations to track payment approval and issue to the recipient.

How To Approve an Award Payment Request

Funding organizations can approve (wholly or partially) or reject payment requests from recipients.

1. Open **Activity›Payment Request Approvals**.
2. Click a **grant name**.
3. Click the ✏ **(Edit icon)** next to a payment request name.
4. For reimbursement requests, click the **category name** to review the expenses for each category.
5. Update **Approved Amount** as necessary. This defaults to the *Requested Amount*.
6. Add **Comments** (optional). These will be visible to the recipient.
7. Click **Approve** to send your response to the recipient. Once approved, you will no longer be able to edit the payment request.

⚠ **Note**

The Remaining amount for each category and line item shows the remaining grant funded amounts. This calculation includes approved and pending expenses.

[Approve Reject Cancel]

8. In the confirmation pop-up window, enter **APPROVE** and click **Approve**.

How To Reject an Award Payment Request
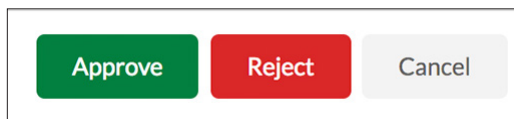
Funding organizations can approve (wholly or partially) or reject payment requests from recipients.

1. Open **Activity›Payment Request Approvals**.
2. Click a **grant name**.
3. Click the ✏ **(Edit icon)** next to a payment request name.
4. Add **Comments** (optional). These will be visible to the recipient.
5. Click **Reject** to send your response to the recipient. The *Approved*

Amount will automatically update to $0.00 upon rejection. Once rejected, you will no longer be able to edit the payment request.
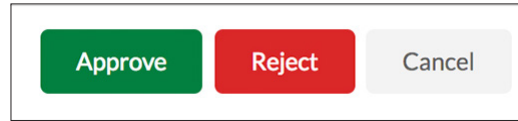
6. In the confirmation pop-up window, enter **REJECT** and click **Reject**.

How To Add an Award Payment Authorization

Once a payment request has been approved, the funder can create a payment authorization to track the approval and payment. The recipient organization will not have insight into a funder's payment authorizations. Payment authorizations can be created from the *Post-Award tab>Cash Flow>Payment Authorizations* or directly from the payment request.

1. Open **Award Management>Awards**.
2. Click the ⓢ **(View Award icon)** next to a lead recipient name.
3. Open the **Post-Award tab>Cash Flow>Payment Authorizations**.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. Add payment authorization **Name**.
6. Select **Payment Status.**
7. Add **Related Payment Request(s)** (optional).
8. Select **Authorization Date**.
9. Select **Authorized By** staff member. This list pulls from *Contacts>Staff.*
10. Add internal **Comments** (optional).

Payment Information

11. Check the **Select Payment Source by Budget Category checkbox** to select the funding source and amount for each budget category on the linked payment request.

12. Add **Amount Paid**.
13. Select **Payment Method**.

14. Select **Payment Date**.

15. Add **Payment Reference** code (optional). This field may be used as reference for your financial system.

16. Add **Payment Notes** (optional).

17. Click **Create**.

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Icons

🖶   Print

ℹ   Help

✏   Edit

➕   Add

🗑   Delete

🔍   View

🔨   Decision

Management

The Management section of the Post-Award tab holds Contracts, Reporting Periods, and Amendments. Reporting periods allows funders to track the health and progress of their awards in regularly segmented intervals over the lifetimes of the awards. Recipients submit reporting periods, which can include expenses and achievements, for review and rejection if necessary. 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.

How To Configure Award Reporting Period Settings

1. Open **Award Management>Awards**.

2. Click the ⊛ **(View Award icon)** next to a lead recipient name.

3. Open the **Post-Award tab>Settings>Grant Settings**.

4. Click the ✏ **(Edit icon)** in the *Icon Bar*.

5. Select the **Budget Reporting Period**.

6. Select the **Due Date for Budget Items** (optional). This is the date that budget items must be submitted to the funder for the reporting period.

7. Select the **Performance Reporting Period**.

8. Select the **Due Date for Performance Items** (optional). This is the date that performance items must be submitted to the funder for the reporting period.

9. Click **Save**.

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 Reject an Award Reporting Period

Prerequisite: Reporting period cannot be linked to a payment request

1.   Open **Award Management>Awards**.

2.   Click the ⑤ **(View Award icon)** next to a lead recipient name.

3.   Open the **Post-Award tab>Management>Reporting Period.**

4.   Click an **award name.**

5.   Click a **reporting period start date**.

Record Information

6.   Add **Comments** (optional). Check the **Include comments in notification email checkbox** to send comments to the recipient. If this checkbox is not checked, the recipient will not view the comments.

7.   Click **Reject** to reject the reporting period and send it back to the recipient for editing.

How To View an Award Amendment Status

1.   Open **Award Management>Awards**.

2.   Click the ⑤ **(View Award icon)** next to a lead recipient 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 Submit a Decision on an Award Amendment

Prerequisite: Must be a funder Organizational Admin, Grant Manager, or Responsible Individual

1.   Open **Award Management>Awards**.

2.   Click the ⑤ **(View Award icon)** next to a lead recipient 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 an amendment.

Amendment Request Response

5. Select your decision **Status**.

   • **Approved:** The amendment is approved as proposed or adjusted

   • **Denied:** The amendment is denied

   • **Needs More Information:** The amendment is denied and more information from the recipient is necessary

6. Add amendment information.

⚠️ **Warning**

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

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.

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

1. Open **Award Management>Awards**.

2. Click the 💲 **(View Award icon)** next to a lead recipient 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 an amendment.

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

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

🛈 **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

   Status ✓ Select Status
           Approved
           Denied
           Denied: Needs More Information
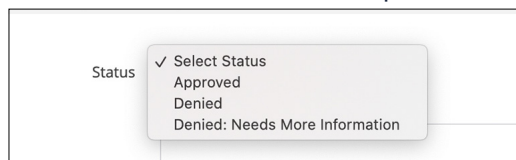
7. If you approve the amendment, select the **Approved End Date** and **Approved Close Out Date**. This defaults to the *Proposed End Date* and *Proposed Closed Out Date* requested by the recipient.

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 award End Date and Close Out Date will be automatically updated.

Submission Reminder 🔔

By submitting you will be sending the amendment decision to the recipient organization.

You cannot make any further changes after submission.

Submit   Cancel

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

1. Open **Award Management>Awards**.

2. Click the 💲 **(View Award icon)** next to a lead recipient 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 an amendment.

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

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

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

Status   ✓ Select Status
          Approved
          Denied
          Denied: Needs More Information

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.

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

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.

> ⚠ **Warning**
>
> Once you submit your decision, you will not be able edit it.

Submission Reminder 🔔

By submitting you will be sending the amendment decision to the recipient organization.

You cannot make any further changes after submission.

[Submit] [Cancel]

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

1. Open **Award Management>Awards**.

2. Click the ⑤ **(View Award icon)** next to a lead recipient 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 an amendment.

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

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

> ⓘ **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

Status   ✓ Select Status
         Approved
         Denied
         Denied: Needs More Information

7. 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.

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.

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

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 new categories will be automatically added to the award budget.

> **⚠ Warning**
>
> Once you submit your decision, you will not be able edit it.

Submission Reminder 🔔

By submitting you will be sending the amendment decision to the recipient organization.

You cannot make any further changes after submission.

[Submit] [Cancel]

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

1. Open **Award Management>Awards**.

2. Click the ⊛ **(View Award icon)** next to a lead recipient 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 an amendment.

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

[Award Duration ⊚] [Awarded Amount ⊚] [Category Budget ⊚] [Performance Goal ⊚]

> **❗ 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

Status   ✓ Select Status
         Approved
         Denied
         Denied: Needs More Information

7. 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.

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

9. To *Attach Documentation*, click **Choose File** and 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 new goals will be automatically added to the award performance plan.

❗ 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.

Submission Reminder 🔔

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

[Submit] [Cancel]

AmpliFund

Icons

🖨 Print

ℹ Help

➕ Create

✏ Edit

🗑 Delete

Settings

The Settings section of the Post-Award tab holds configuration settings for the award's risk, budget and performance plan, reminders, and other general settings such as reporting periods, and financial code.

How To Configure Award Settings

Award settings include reporting periods, financial code, and expenses entry method.

1. Open **Award Management>Awards**.
2. Click the 🪙 **(View Award icon)** next to a lead recipient name.
3. Open the **Post-Award tab>Settings>Grant Settings**.
4. Click the ✏ **(Edit icon)** in the *Icon Bar*.
5. Select the **Budget Reporting Period**.
6. Select the **Due Date for Budget Items** (optional). This is the date that budget items must be submitted to the funder for the reporting period.
7. Select the **Performance Reporting Period**.
8. Select the **Due Date for Performance Items** (optional). This is the date that performance items must be submitted to the funder for the reporting period.
9. On the *Add Expenses To Payment Requests By* field, select how recipients should add expenses to payment requests.
   - **Date Range:** Reviewed or closed expenses can added to payment requests by their expense date
   - **Reporting Periods:** Only expenses that are closed out in reporting periods can be added to payment requests
   - **Date Range and Reporting Periods:** Reviewed or closed expenses can be added to payment requests by reporting period or by date
10. Select the **Allowable Amendment Types** that recipients will be able to submit.
11. Add the award **Financial Code** (optional). This is a unique code that will help identify the award during import.
12. Click **Save**.

How To Configure Award Task Reminders

1. Open **Award Management>Awards**.
2. Click the 🪙 **(View Award icon)** next to a lead recipient name.
3. Open the **Post-Award tab>Settings>Reminders**.

4. Click the ✏ (**Edit icon**) in the *Icon Bar*.

5. Select dates for **Default Task Reminders, Default Budget Reminders,** and **Default Performance Reminders** (optional). AmpliFund automatically will send email reminders to Responsible Individuals on these dates.

How To Configure Award Risk Thresholds

Award analytics pages will show award risk as high, medium, or low. Award risk is defined by budget, performance, or reporting thresholds. An award's overall risk is dictated by its highest level of risk in any category.

1. Open **Award Management>Awards**.

2. Click the ⑤ (**View Award icon**) next to a lead recipient name.

3. Open the **Post-Award tab>Settings>Risk Configuration**.

4. Click the ✏ (**Edit icon**) in the *Icon Bar*.

5. Check the **Monitor Reporting Risk checkbox** if desired. This calculates reporting risk as the number of days a report is past due for a reporting period.

    a. Add the **Low, Medium,** and **High** risk thresholds for number of days past due.

6. Check the **Monitor Budget Risk checkbox** if desired. This calculates budget risk as budget variance between planned and actual expenses as allocated.

    a. Add the **Low, Medium,** and **High** risk thresholds for percent within total budget.

7. Check the **Monitor Performance Risk checkbox** if desired. This calculates performance risk as the total percentage of performance goals out of allocation.

    a. Add the **Low, Medium,** and **High** risk thresholds for percent of goals on target.

Appendix

Goal Types

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

Milestone

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

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

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

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

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

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.