AmpliFund Grant Management

Contents

Grant Overview

Grant Management allows users to view, create, edit, and delete grant records. The Grant lists show grant details, and provide access to other grant-related information, such as performance plans and budget plans.

Research

For clients with the Research module only

The Research module allows users to research funding opportunities based on selected search criteria and terms. Users with appropriate security may locate funding opportunities, save searches, and save grants in the Research module.

To learn more about AmpliFund Research, see the ***AmpliFund Grant Research Guide***.

Grants List

Grants may be accessed from different lists within the Grant Management module. User security roles determine which grant records will appear to each user on every list in the Grant Management module. See Grant List Security for more details on levels of access to each list.

Grant List Icons

Icon	Description
	Print
	Help
	Save Current View
	Create
	Import
	Export
	Activate Award

Grants

Grants includes all grants that an organization has begun to apply for, applied for, received, or been denied. Within Grants, users may access grants from several lists detailed below.

To view grants:

1. Open ***Grant Management → Grants***.
2. Open a ***grant list*** from the *Left Navigation Panel*.

All Grants

The All Grants list displays every enabled grant record visible to a user, regardless of the award status.

Pending Grants

The Pending Grants list displays all grant records with an award status of Pending, Internal Review, or To Be Submitted.

Active Grants
The Active Grants list displays all grant records with an award status of Approved or Extended.

Denied Grants
The Denied Grants list displays all grant records with an award status of Denied.

Cancelled Grants
The Cancelled Grants list displays all grant records with an award status of Cancelled.

Closed Grants
The Closed Grants list displays all grant records with an award status of Closed.

Completed Grants
The Completed Grants list displays all grant records with an award status of Completed.

Deleted/Disabled Grants
The Deleted/Disabled Grants list displays all grant records that have been deleted, or with a record status of Disabled. From this list, grant records may be purged in order to permanently remove the grant from AmpliFund. To learn how to delete a grant, see Deleting Grants. To learn more about how to disable a grant, see Disabling Grants.

Grant Dashboards
Interactive dashboards are available for multiple and individual grants. For more information on AmpliFund dashboards, see the AmpliFund Dashboards Guide.

➡ **To view overall grant dashboard:**

1. Open ***Grant Management → Grants***.
2. Open a **grant list page** (i.e. All Grants, Pending Grants, etc.).
3. Open the **Analytics tab**.

➡ **To view individual grant dashboard:**

1. Open ***Grant Management → Grants***.
2. Click a **grant name**.
3. Open the **Analytics tab**.

Grants Awarded
For clients with Sub-Recipient Licenses

The Grants Awarded list displays all grants that have been awarded to a recipient or sub-recipient. From this list, funders can view and make decisions on recipient closed reporting periods, amendments, and payment requests. They can also activate awards, send recipients activation emails, add amendments, and view awarded amount history.

Funding Opportunities
For clients with the Competitive Award Management module and Fund Management module

The Fund Opportunities list displays all opportunities with at least one grant as a funding source.

Grant Opportunities
For clients with the Competitive Award Management module

The Grant Opportunities list displays all competitive opportunities for sub-awards related to a grant your organization has received.

Sub-Awards

For clients with Sub-Recipient Licenses

The Sub-Awards list displays all sub-awards your organization has awarded.

Please Note: If a parent grant is deleted, any associated sub-awards will also be deleted.

Grant List Security

The grants that are visible and editable on any of the Grant lists vary depending on the user's security role. Each user is assigned an explicit security role, which relates to their overall access into the system. If users are designated as a Grant Writer, Grant Manager, or Additional Staff, they will have additional security privileges on those records as an implicit security role.

Explicit Security Roles

Organizational Administrators

Organizational Administrators have the highest level of security and can create, view, and edit all records in the account, including Staff compensation information.

Executive

Executives can view all records in the account, including Staff compensation information, but cannot add or edit any records.

Department Administrators

Department Administrators can create, view, and edit all grant records linked to their department(s).

Department Users

Department Users can add achievements and expenses that are assigned to them. In addition, they can view all grant records linked to their department(s). Department Users are classified as Salary or No Salary. Department Users (No Salary) cannot create, view, or edit personnel line items on a grant's budget.

Project Administrators

Project Administrators can view all grants related to their projects.

Project Users

Project Users can add achievements and expenses assigned to them and can view any grants linked to their projects. Project Users are classified as Salary or No Salary. Project Users (No Salary) cannot create, view, or edit personnel line items on a grant's budget.

Fund Administrators

Fund Administrators do not have access to grants unless assigned as a Grant Writer, Grant Manager, or Additional Staff.

Fund Users

Fund Users do not have access to grants unless assigned as a Grant Writer, Grant Manager, or Additional Staff. Fund Users are classified as Salary or No Salary. If assigned to a grant, Fund Users (No Salary) cannot create, view, or edit personnel line items on a grant's budget.

Implicit Security Roles

Implicit security roles can give users additional access to grants based on their roles.

Grant Writers

Grant Writers may view grant details, performance plans, and budget plans. They cannot create, edit, or delete grant details, goals, or line items.

Additional Staff

Additional Staff may view grant details, performance plans, and budget plans. They cannot create, edit, or delete grant details, goals, or line items.

Grant Managers

Grant Managers have full access to edit grant details, and create, edit, and delete all items related to their grant. These users may also assign responsibility for goals and line items to other users.

Responsible Individuals

Responsible Individuals are responsible for overseeing a performance goal or line item's completion. These users have visibility on their grants.

Grant Sorting, Columns, and Filters

The Grants list shows the Name, Grantor, Award Status, Total Awarded Amount, Fiscal Year Received, Close Out Date, and Status columns by default. Most of the fields that appear on the grant details page can be added to the grid. 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 filter on grid views.

Viewing Grants

The Grant Details page shows information about the grant. From the Grant Details page, Pre-Award and Post-Award information, Tools, and Grant Workflows (for users with the *Workflow* module) can be accessed.

Grant Details Icons

Icon	Description
🖶	Print
ℹ	Help
☆	Favorite
✎	Edit
⧉	Copy
🗑	Delete
⊗	Purge
⛑	Restore

To view a grant:

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

Adding Grants

Grants may be created by Organization Administrators or Department Administrators.

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

To add a grant:

1. Open ***Grant Management → Grants → All Grants.***
2. Click the **+ (Create icon)** in the *Icon Bar*.
3. In the *Grant Information* section, add a **grant Name**.
4. Select the **Grantor**. This list pulls from *Contacts → Organizations*.
5. Add the **RFP ID Number** (Request For Proposal Identification Number), **Funding Opportunity Number**, and/or **CFDA Number** (Catalog of Federal Domestic Assistance Number) (optional).
6. In the *Pre-Award* section, select if the funder requires a **Letter of Intent**. If *Yes*, select a **Letter of Intent Due Date**.
7. Add the **Proposed Length of Award** in years and any additional months.
8. Select the **Proposal Open Date** and **Proposal Close Date** (optional). These are the dates when the funder starts and stops accepting applications, respectively.
9. Select the **Proposal Submitted Date** (optional).
10. Select the **Projected Receipt Date**. This is the expected date of award notification/receipt.
11. Select **Grant Writer(s)** (optional). This list pulls from *Contacts → Staff*. Grant Writers may view grant details, performance plans, and budget plans. They cannot create, edit, or delete grant details, goals, or line items.
12. Select associated **Department(s) or Program(s)** (optional). This list pulls from *Administration → System Security → Departments*.
13. Select associated **Subject(s)** (optional). This list pulls from *Administration → Lists → Subjects*.
    a. To create a new subject, click the **+ (Create icon)** next to the *Subject(s)* field.
    b. In the pop-up window, add a subject **Name**.
    c. Click **Create**.
14. Select **Additional Staff** (optional). This list pulls from *Contacts → Staff*. Additional Staff may view grant details, performance plans, and budget plans. They cannot create, edit, or delete grant details, goals, or line items.
15. For users with the *Project* add-on module, select associated **Project(s)** (optional). This list pulls from *Project Management → Projects*.
16. Add the **Weight percentage** of the pre-award grant in decimal format (optional). The weight can help you prioritize your pre-award grants.
17. In the *Pre-Award Budget* section, add the **Requested Amount** from grantor.
18. Add the planned **Cash Match Requirement** and/or **In-Kind Match Requirement** (optional).
19. In the *Description* section, add **Description**, **Award Details**, **Eligibility Requirements**, and **Additional Information** (optional).
20. In the *Status* section, select **Award Status** and **Award Type** (optional).
21. In the *Post-Award* section, select a **Grant Manager**. This list pulls from *Contacts → Staff*. Grant Managers have full access to edit grant details, and create, edit, and delete all items related to their grant. These users may also assign responsibility for goals and line items to other users.
22. Select the **Awarded Date** and **Length of Award** in years and any additional months.
23. Select the award **Start Date** and **End Date**.
24. Select the award **Close Out Date**. This is the date the award must be closed out by.
25. Add the **Activity Code**, **Federal Agency and Organizational Element**, **Identifying Number Assigned by Federal Agency**, and/or **Recipient Account Number** (optional).
26. Select the **Payment Request Type**. Reimbursement payment requests are made to the funder from expenses that will be reimbursed; cash advance payment requests are made to the funder before expenses have been accrued.

27. Select if the grant will **Record Program Income** (for federally funded grants).
    a. If *Yes*, select the **Method of Expenditure**. This can be *Addition*, where program income is added to the funds committed by the grantor, or *Deduction*, where program income offsets the total funds committed by the grantor.
28. Select if **FFATA Reporting Needed** (for federally funded grants).
    a. If *Yes*, you must provide an **Identifying Number Assigned by Federal Agency**.
29. Select the **Budget Tracking Interval**.
30. Select the **Due Date for Budget Items** (optional).
31. Select the **Performance Tracking Interval**.
32. Select the **Due Date for Performance Items** (optional).
33. Select the **HR Actual Entry Method** and **GL Actual Entry Method** (optional). Note: If **Import Only** is selected, users will not be able to add, edit, or delete line item expenses within AmpliFund.
34. Add the grant **Financial Code** (optional). This is a unique code that will help identify the grant during import.
35. In the *Post-Award Budget* section, add **Total Awarded Amount** received from grantor (optional).
36. Add the **Cash Match Amount** and **In-Kind Match Amount** (optional).
37. In the *Default Settings for Sending Task Reminders* section, 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.
38. In the *Record Information* section, add a **Unique Identifier** (optional).
39. Select the grant record **Status** as Enabled or Disabled.
40. Click **Create**.

For more information on grant details fields, see Grant Field Definitions in the Appendix.

Editing Grants

Once created, grant record details may be edited by Organizational Administrators, Department Administrators, and Grant Managers. Administrators and Grant Managers can edit grant information as well as the performance and budget plans.

To edit grant details:

1. Open ***Grant Management → Grants → All Grants***.
2. Click the **(Edit icon)** next to a grant name.
3. Update the information as necessary.
4. Click **Update**.

-- OR --

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Click the **(Edit icon)** in the *Icon Bar*.
4. Update the information as necessary.
5. Click **Update**.

Copying Grants

Copying a grant provides a quick method for pulling over all existing grant information into a new grant record. When a grant is copied, all information from the grant details pulls into the new grant record. Once copied, any grant-related information may be updated or deleted as needed.

To copy a grant:

1. Open ***Grant Management → Grants → All Grants***.
2. Click the **(Copy icon)** next to a grant name.

3. Update information as necessary.
4. Click **Copy.**
   -- OR --
1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Click the **(Copy icon)** in the *Icon Bar*.
4. Update information as necessary.
5. Click **Copy**.

Deleting Grants

Deleting a grant removes the grant from grants lists, but does not completely remove the record from AmpliFund. Once deleted, the grant moves to the Deleted/Disabled Grants list. To completely remove the grant from AmpliFund, it must be purged from the Deleted/Disabled Grants list. If a grant has been deleted, it may be restored to the Grants list at any time.

To delete a grant:

1. Open ***Grant Management → Grants → All Grants***.
2. Click the **(Delete icon)** next to a grant name.
3. In the confirmation pop-up window, click **Delete**.
   -- OR --
1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Click the **(Delete icon)** in the *Icon Bar*.
4. In the confirmation pop-up window, click **Delete**.

To purge a grant:

1. Open ***Grant Management → Grants → Deleted/Disabled Grants***.
2. Click a **deleted grant's name**.
3. Click the **(Purge icon)** in the *Icon Bar*.
4. In the confirmation pop-up window, click **Purge**.

To restore a grant:

1. Open ***Grant Management → Grants → Deleted/Disabled Grants***.
2. Click a **deleted grant's name**.
3. Click the **(Restore icon)** in the *Icon Bar*.
4. In the confirmation pop-up window, click **Restore.**

Disabling Grants

Disabling grants removes the grant from grants lists. Disabled grants will not appear in reports.

To disable a grant:

1. Open ***Grant Management → Grants → All Grants***.
2. Click the **(Edit icon)** next to a grant name.
3. In the *Record Information* section, select **Disabled** from the *Status* dropdown menu.
4. Click **Update**.
   -- OR --
1. Open ***Grant Management → Grants → All Grants***.

2. Click a **grant name**.
3. Click the **(Edit icon)** in the *Icon Bar*.
4. In the *Record Information* section, select **Disabled** from the *Status* dropdown menu.
5. Click **Update**.

Pre-Award Planning vs. Post-Award Planning

Performance and Budget Plans may be created in the Pre-Award or Post-Award tabs of the grant record. Pre-award planning builds a proposed performance plan and budget for grant applications. Post-award plans reflect program activities and spending approved by the grantor in the grant agreement or contract.

The ability to create, edit, and delete items are very similar between the Pre-Award and Post-Award tabs; however, staff cannot track expenses against line items and cannot track achievements against performance goals in the Pre-Award tab.

Once the award's status has been updated to Approved, a pre-award performance plan may be copied to the post-award performance. After copying the plan, performance goals and strategies may be edited, deleted, or created.

Performance Planning

Performance Plan Overview

Performance plans contain programmatic measurable items used to define the success of the overall grant award. The performance plan consists of goals and overarching strategies that link goals together.

Once post-award goals are created and assigned, automated email reminders will be sent and Responsible Individuals may begin marking progress against the goals.

Performance Plan Sorting, Columns, and Filters

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.

Performance Plan Icons

Icon	Description
	Print
	Help
	Create
	Report
	Save Current View
	Import
	Edit
	Copy
	Delete
	Spread Evenly
	Clear

Icon	Description
🏆	Achievements

Goals

Goals are measurable activities planned to ensure grant deliverables are met on the award's timeline. Each goal may have a name, description, and Responsible Individual.

Goal Types

AmpliFund has six types of goals.

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

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

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

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

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

Reimbursement 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.

For more information about tracking reimbursement goals in the budget, see [Expense Budget Planning](#).

Adding Goals

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

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

➲ **To add a goal:**

1. Open ***Grant Management→ Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → 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**.
7. Add the **goal information**. The fields may vary depending on the goal type.

8. Click **Save.**

➲ To add a milestone goal:

1. Open ***Grant Management*** **→** ***Grants*** **→** ***All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab*** **→** ***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 Type**.
   a. Select the **Responsible Individual**. This list pulls from *Contacts* → *Staff*. The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.
   b. Select the **Responsible Sub-Recipient**. This list pulls from *Contacts* → *Sub-Recipients*. The Responsible Sub-Recipient organization can select their own Responsible Individual for the goal who can add achievements to the goal and is assigned system-generated tasks related to the goal.
10. For clients with the *Project* module, select a **Project Goal** (optional).
11. Select a goal **Due Date**.
12. Click **Save.**

➲ To add a narrative goal:

1. Open ***Grant Management*** **→** ***Grants*** **→** ***All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab*** **→** ***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 Type**.
   a. Select the **Responsible Individual**. This list pulls from *Contacts* → *Staff*. The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.
   b. Select the **Responsible Sub-Recipient**. This list pulls from *Contacts* → *Sub-Recipients*. The Responsible Sub-Recipient organization can select their own Responsible Individual for the goal who can add achievements to the goal and is assigned system-generated tasks related to the goal.
10. For clients with the *Project* module, select a **Project Goal** (optional).
11. Add the **Question** that the goal will answer.
12. Click **Save.**

➲ To add a numeric goal:

1. Open ***Grant Management*** **→** ***Grants*** **→** ***All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab*** **→** ***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 Type**.
    a. Select the **Responsible Individual**. This list pulls from *Contacts* → *Staff*. The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.
    b. Select the **Responsible Sub-Recipient**. This list pulls from *Contacts* → *Sub-Recipients*. The Responsible Sub-Recipient organization can select their own Responsible Individual for the goal who can add achievements to the goal and is assigned system-generated tasks related to the goal.
10. For clients with the *Project* module, select a **Project Goal** (optional).
11. Add the **Number To Be Achieved**.
12. Click **Save.**

To add a percent achieved goal:

1. Open ***Grant Management*** → ***Grants*** → ***All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab*** → ***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 Type**.
    a. Select the **Responsible Individual**. This list pulls from *Contacts* → *Staff*. The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.
    b. Select the **Responsible Sub-Recipient**. This list pulls from *Contacts* → *Sub-Recipients*. The Responsible Sub-Recipient organization can select their own Responsible Individual for the goal who can add achievements to the goal and is assigned system-generated tasks related to the goal.
10. For clients with the *Project* module, select a **Project Goal** (optional).
11. Add the **Percent Desired**.
12. Click **Save.**

To add a percent changed goal:

1. Open ***Grant Management*** → ***Grants*** → ***All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab*** → ***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 **Percent Changed** from the *Goal Type* dropdown.
7. Add the goal **Name.**
8. Add the goal **Description** (optional).
9. Select the **Responsible Type**.
    a. Select the **Responsible Individual**. This list pulls from *Contacts* → *Staff*. The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.
    b. Select the **Responsible Sub-Recipient**. This list pulls from *Contacts* → *Sub-Recipients*. The Responsible Sub-Recipient organization can select their own Responsible Individual for the goal who can add achievements to the goal and is assigned system-generated tasks related to the goal.
10. For clients with the *Project* module, select a **Project Goal** (optional).
11. Add the **Current Percent** and **Percent Desired**.
12. Click **Save.**

To add a reimbursement goal:

1. Open ***Grant Management*→ *Grants* → *All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab* → *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 **Reimbursement** from the *Goal Type* dropdown.
7. Check the **Add as Budget Line Item** checkbox to add the goal to the grant's expense budget. Note: If selected, any changes to the goal will be automatically reflected in the grant's budget.
8. Add the goal **Name**.
9. Add the goal **Description** (optional).
10. Select the **Responsible Type**.
    a. Select the **Responsible Individual**. This list pulls from *Contacts → Staff*. The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.
    b. Select the **Responsible Sub-Recipient**. This list pulls from *Contacts → Sub-Recipients*. The Responsible Sub-Recipient organization can select their own Responsible Individual for the goal who can add achievements to the goal and is assigned system-generated tasks related to the goal.
11. For clients with the *Project* module, select a **Project Goal** (optional). Add the **Rate Per Achievement** (the rate per unit) in dollars.
12. Add the **Number To Be Achieved**.
13. Click **Save.**

Adding Goal Allocations and Attachments

Some goals have allocations tabs. All goals allow you to add an attachment.

To add allocations to a goal:

1. Open ***Grant Managements*→ *Active Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab*→ *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 allocate **Yearly** or **Monthly**.
7. Add allocation **amounts**. Click the **(Clear icon)** to remove all selections. Click the **↔ (Spread Evenly icon)** to spread amounts evenly. Note: Numeric goals will spread whole numbers; any remainder will be added to the last month.
8. Click **Save**.

To add an attachment to goal:

1. Open ***Grant Managements*→ *Active Grants***.
2. Click a **grant name**.
3. Open ***Post-Award tab*→ *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 the file.
8. Click **Save**.

Editing Goals

Goal names, descriptions, responsible individuals and targeted goals may be edited. Once a goal has been created with a specific goal type selected, the goal type **cannot** be changed.

To edit a goal:

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Performance Plan***.
4. Click the **(Edit icon)** next to a goal name.
5. Update the information as necessary.
6. Click **Save.**

-- OR --

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Performance Plan***.
4. Click a **goal name**.
5. Click the **(Edit icon)** in the *Icon Bar*.
6. Update the information as necessary.
7. Click **Save.**

Copying Goals

Existing goals may be copied to create a new goal. Similar to editing goals, once a goal has been created with a Goal Type, that field **cannot** be edited. Goal Names, Descriptions, Responsible Individuals and targeted goals may be edited.

To copy a goal:

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Performance Plan***.
4. Click the **(Copy icon)** next to a goal name.
5. Update the information as necessary.
6. Click **Create**.

-- OR --

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Performance Plan***.
4. Click a **goal name**.
5. Click the **(Copy icon)** in the *Icon Bar*.
6. Update the information as necessary.
7. Click **Create**.

Deleting Goals

Goals may be deleted as long as there are not any achievements recorded against those goals.

To delete a goal:

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Performance Plan***.
4. Click the **(Delete icon)** next to a goal name.
5. In the pop-up confirmation window, click **Delete.**

-- OR --

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Performance Plan***.
4. Click a **goal name**.

5. Click the **(Delete icon)** in the *Icon Bar*.
6. On the confirmation page, click **Delete**.

Strategies

Strategies are overarching objectives which group together goals that have a common topic. The purpose of using strategies is to associate goals together. Strategies do not have a metric or measurable item assigned.

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

Adding Strategies

Once created, strategies may be connected to one or more performance goals.

To add a strategy:

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

Editing Strategies

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

To edit a strategy:

1. Open ***Grant Management*** → ***Grants*** → ***All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab*** → ***Performance Strategies***.
4. Click the **(Edit icon)** next to a strategy name.
5. Update the information as necessary.
6. Click **Save.**

-- OR --

1. Open ***Grant Management*** → ***Grants*** → ***All Grants***.
2. Open the ***Post-Award tab*** → ***Performance Strategies***.
3. Click a **strategy name.**
4. Click the **(Edit icon)** in the *Icon Bar*.
5. Update the information as necessary.
6. Click **Save**.

Deleting Strategies

Strategies can be deleted after creation if they are not connected to any performance goals. If a strategy is associated with a goal, the strategy must be removed from the goal before it can be deleted.

To delete a strategy:

1. Open ***Grant Management*** → ***Grants*** → ***All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab*** → ***Performance Strategies***.
4. Click the **(Delete icon)** next to a strategy name.
5. In the pop-up confirmation window, click **Delete**.

-- OR --

1. Open ***Grant Management→ Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Performance Strategies***.
4. Click a **strategy name**.
5. Click the **(Delete icon)** in the *Icon Bar*.
6. In the pop-up confirmation window, click **Delete.**

Achievements

An achievement is progress accomplished against a goal. Achievements can be added as staff progress toward planned grant programmatic goals.

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

Adding Achievements

As a user makes progress against a goal, that goal's partial or whole completion may be marked at any time by adding an achievement. Achievements may be added through the ***Activity*** module or the ***Grant Management*** module.

To add an achievement:

1. Open ***Grant Management→ Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Performance Plan***.
4. Click the **(Achievements icon)** next to a goal name.
5. Click the **(Create icon)** in the *Icon Bar*.
6. In the pop-up window, select the **Achievement Date**.
7. Add the **achievement**—depending on the goal type, you may capture the Achievement as complete/not complete, a number, or a percentage.
8. Add **Notes** and **Attachments** (optional).
9. Click **Create**.

Viewing Achievements Details

Users may view individual achievements in more detail from ***Grant Management→ Grants → All Grants → select a grant→ Post-Award tab → Performance Plan → select a goal → Achievements tab***. Responsible individuals may edit or remove their achievements.

To view an achievement's details:

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Performance Plan***.
4. Click the **(Achievements icon)** next to a goal name.
5. Click an **achievement date.**

Editing Achievements

While viewing the Achievements list, Responsible Individuals may edit their achievements. Achievements can be edited until the Grant Manager closes the goal's Performance Tracking Interval.

To edit an achievement:

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Performance Plan***.

4. Click the (**Achievements icon)** next to a goal name.
5. Click the **(Edit icon)** next to an achievement date.
6. In the pop-up window, update the information as necessary.
7. Click **Update.**

Deleting Achievements

Responsible Individuals may delete achievements if they fall within an open Performance Tracking Interval.

To delete an achievement:

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Performance Plan***.
4. Click the **(Achievements icon)** next to a goal name.
5. Click the **(Delete icon)** next to an achievement date.
6. In the confirmation pop-up window, click **Delete**.

Once deleted, the achievement will no longer be visible on the Achievements list or in reports.

Budget Settings

Budget Settings Overview

Budget Settings defines budget categories and benefit types. For grants that require tracking of matching or indirect cost rate, default budget settings may also be configured in the Budget Settings area. A default rate as a percent or dollar amount may be set for Cash Match and/or In-Kind Match. Indirect Cost Rate may be set as a percent.

Budget settings may also be updated within budget categories and budget line items. This permits certain categories or line items to include or exclude matching or indirect, based on the grant agreement.

Recommendation: Update the Budget Settings page before adding any budget line items. Configuring settings first ensures that the default match and indirect configurations appear whenever you create a new grant budget line item, and that the necessary budget categories and benefit types may be used. If you do not update the budget settings prior to accessing the grant budget, a notification will appear to remind you to first update the budget settings before proceeding.

Budget Settings Icons

Icon	Description
	Print
	Help
	Edit
	Delete

Matching

Matching default settings may be configured for Cash Match and In-Kind Match. Prior to updating Budget Settings, confirm that on the Grant Details page (***Grant Management → Grants → All Grants → select a grant***) there are amounts in the Pre-Award Budget and/or Post-Award Budget fields for Cash Match and In-Kind Match Amounts. Matching may be enabled, disabled, or required. If matching is enabled, it may be used on budget categories and budget line items, but is not necessary to use on every budget category and line item. If matching is disabled, it cannot be used on any budget categories or line items. If matching is required, it must be included on all budget categories and line items.

Defining Match Percentage

Match percentages may be calculated in two ways: as a percent of the total grant or as a percent of the grant-funded amount. The configuration of the match percentage in the budget settings affects how each line item that includes match is calculated. The budget calculations in AmpliFund all assume the following formulas:

Direct Costs = Grant Funded Amount + Cash Match Amount + In-Kind Match Amount

Direct Costs + Indirect Costs = Total Grant Budget

Match as a Percent of the Total Grant Budget Formula

This model specifies that match is calculated as a percentage of the total direct cost.

When entering a category or line item that uses this match calculation method, the following calculations apply:

- Direct Cost: Entered by User
- Match Percentage: Entered by User
- Grant Funded = Direct Cost (1 - Match Percentage)
- Match Amount = Direct Cost - Grant Funded

Example:
Total Grant Budget = $100,000
Cash Match Percent = 25%

A line item is created with a Total Direct Cost of $10,000

The Grant Funded Amount calculates to $7,500
Grant Funded = Direct Cost (1 - Match Percentage)
Grant Funded = $10,000 (1 - .25)
Grant Funded = $7,500

The Cash Match Amount calculates to $2,500
Cash Match = Direct Cost – Grant Funded
Cash Match = $10,000 - $7,500
Cash Match = $2,500

Match as a Percent of the Grant-Funded Amount Formulas

This model assumes that the match percent is calculated as a percentage of the grant-funded amount.

When entering a category or line item that uses this match calculation method, the following calculations apply:

- Direct Cost: Entered by User
- Match Percentage: Entered by User
- Grant Funded = Direct Cost / (1 + Match Percentage)
- Match Amount = Direct Cost - Grant Funded

Example:
Total Grant Budget = $100,000
Cash Match Percent = 25%

A line item is created with a Total Direct Cost of $10,000

The Grant-Funded Amount calculates to $8,000
Grant Funded = Direct Cost / (1 + Match Percentage)
Grant Funded = $10,000 / (1 + .25)
Grant Funded = $8,000

The Cash Match Amount Calculates to $2,000
Cash Match = Direct Cost – Grant Funded
Cash Match = $10,000 - $8,000
Cash Match = $2,000

To configure cash match:

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Budget Settings***.
4. Click the **(Edit icon)** in the *Icon Bar*.
5. In the *Matching* section, select **Enable** or **Require** in the *Match* dropdown.
6. In the *Use Match Percentage As* dropdown, select if the match percentage will be defined as the **Percentage of Total Grant Budget** or **Percentage of Grant-Funded Amount.**
7. Select the **Default Cash Match**.
   a. If **Percentage** is selected, enter the percent (in decimal format) in the *Cash Match Percent* field.
   b. If **Amount** is selected, enter the amount in the *Cash Match Amount* field.
8. Click **Save**.

To configure in-kind match:

1. Open ***Grant Management → Grants → All Grants.***
2. Click a **grant name**.
3. Open the ***Post-Award tab → Budget Settings***.
4. Click the **(Edit icon)** in the *Icon Bar*.
5. In the *Matching* section, select **Enable** or **Require** in the *Match* dropdown.
6. In the *Default In-Kind Match Personnel* dropdown, select **Percentage** or **Amount**.
   a. If **Percentage** is selected, enter the percent (in decimal format) in the *In-Kind Match Percent Personnel* field.
   b. If **Amount** is chosen, enter the amount in the *In-Kind Match Amount* field.
7. Click **Save.**

Indirect Cost Rate

Indirect Cost Rate may be defaulted as a percentage within Budget Settings, with the ability to establish an indirect cap value on the grant to ensure planned spending does not exceed the allowable amount of indirect costs. Indirect may be included on budget categories and budget line items. By including indirect on some or all line items, an indirect cost category will automatically appear in the grant's Expense Budget.

Indirect Cap

Based on a funder's requirements for allowable costs, indirect may be set to a dollar amount or percentage of the grant's Total Awarded Amount.

To configure indirect cap:

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Budget Settings***.
4. Click the **(Edit icon)** in the *Icon Bar*.
5. In the *Indirect Cost Rate* section, select **Yes** in the *Track Indirect Cost Rate* dropdown.
6. Check the **Cap Indirect at ____ Amount of Total Awarded Amount** checkbox.
7. Click **Dollar** or **Percentage** to select the cap cost type.
8. Add the **cap indirect amount** in dollars or percent.
9. Click **Save**.

Indirect Cost Rates

The historical indirect cost rates area captures changes to the indirect cost rate that may occur during a grant's life. If multiple lines of historical indirect cost rates are entered, the grant line items which include indirect will use the rate dictated per period. If a grant line item spans a time period with multiple indirect cost rates, the line item calculations will use each indirect rate planned for that period, changing as the historical indirect rate changes.

Note: If federal and/or non-federal default indirect cost rates are configured in the account settings in the Administration module, those rates will default to the first line of indirect cost rate in the Grant Budget Settings.

To configure indirect cost rate:

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Budget Settings***.
4. Click the **(Edit icon)** in the *Icon Bar*.
5. In the *Indirect Cost Rate* section, select **Yes** in the *Track Indirect Cost Rate* dropdown.
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)** next to End Date to add additional indirect cost rates.
10. Click **Save**.

To delete indirect cost rates:

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Budget Settings***.
4. Click the **(Edit icon)** in the *Icon Bar*.
5. In the *Indirect Cost Rate* section, click the **(Delete icon)** next to an indirect cost rate.
6. Click **Save.**

Categories

Budget categories can be selected on the Budget Settings page (***Grant Management → Grants → All Grants → select a grant → Post-Award tab → Budget Settings***). Budget categories can include Federal and custom categories. Federal budget categories are pre-defined and cannot be edited. Custom categories can be added in ***Administration → Lists → Budget Categories*** or can be created while adding categories to the expense budget.

To add a budget category:

1. Open ***Grant Management → Grants → All Grants.***

2. Click a **grant name**.
3. Open the ***Post-Award tab → Budget Settings***.
4. Click the **(Edit icon)** in the *Icon Bar*.
5. In the *Categories* section, select a **category** from the *Budget Categories* dropdown.
6. Click **Add**.
7. Click **Save.**

To remove a budget category:

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Budget Settings***.
4. Click the **(Edit icon)** in the *Icon Bar*.
5. In the *Categories* section, click the **(Delete icon)** next to a budget category.
6. Click **Save.**

Benefits

Benefits may be added either with a personnel line item or as a standalone line item. Benefit types can be selected on the Budget Settings page (***Grant Management → Grants → All Grants → select a grant → Post-Award tab → Budget Settings***). Custom benefit types can be added in ***Administration → Lists → Benefit Types***, and then selected from the Budget Settings page.

Adding Benefits by Personnel

Benefits may be added with personnel line items in the budget. This is recommended if benefit expenses are tracked on a per-employee basis for each grant and will default existing benefit configurations from staff compensation history to appear on staff personnel line items. To learn more about how to track benefits by each personnel line item, see Benefits.

To learn more about configuring benefit defaults as part of a staff member's compensation history, see the ***AmpliFund Contact Management Guide***.

Adding Benefits by Benefit Type

Benefits may also be added as standalone line items in the budget. These benefits act as buckets for all personnel-related benefit line items on the grant. This is recommended if benefit expenses are not tracked per grant-funded staff position, but rather as a collective expense for all grant-funded positions on the grant.

To add a benefit type:

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Budget Settings***.
4. Click the **(Edit icon)** in the *Icon Bar*.
5. In the *Benefits* section, select **Personnel** or **Benefit Type** in the *Add Benefits By* dropdown.
6. In the *Supported Benefit Types* dropdown, select a **benefit type**.
7. Click **Add**.
8. Click **Save**.

To remove a benefit type:

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

4. Click the **(Edit icon)** in the *Icon Bar*.
5. In the *Benefits* section, click the **(Delete icon)** next to a benefit type.
6. Click **Save**.

To learn more about managing the list of available benefit types, see the ***AmpliFund Administration Guide***.

Expense Budget Planning

Expense Budget Overview

Expense budgets contain budgeted items that define the planned spend down of the overall grant award. The expense budget contains categories, non-personnel, personnel, and benefit line items.

After post-award budget line items are created, expenses may be recorded against budgeted line items.

Budget Icons

Icon	Description
	Print
	Help
	Report
	Import
	Add
	Edit
	Delete
	View Expenses
	Locked
	Spread Evenly
	Clear

Budget

Budgets can be viewed by categories, projects, and recipients. Additional options may be shown or hidden after selecting a budget view type. After a budget has been configured to show in the desired way then the user leaves the page, upon returning the budget will hold its previous configuration.

Note: Based on add-on modules in a client account, some view and configuration options may not be available.

When you open a Budget (***Grant Management → Grants → All Grants → select a grant → Post-Award tab → Budget***), you will see the Expense Budget and the Revenue Budget in the Budget section.

Expense Budget

The Expense Budget contains all planned expense items within a grant budget, including categories, line items, and if applicable, planned match expenses. Expense budgets appear when viewing the budget by Category, Project, and Recipient.

Revenue Budget

The Revenue Budget contains all planned grant revenue, including grant funding, cash match, in-kind match, and program income. These values pull from the grant Post-Award Budget information.

Budget Views

In the Budget View Settings section, you can select to view by Category, Project, or Recipient.

Category View

Category View (default) displays budgeted items by assigned budget category in the expense budget, as well as Indirect, Reimbursement goals, and Uncategorized, if applicable.

Project View

For clients with the Project Management module

Project View groups budgeted items based on each line item's associated project

Recipient View

For clients with sub-recipient licenses

Recipient View groups budgeted items based on their associated recipient organization. The recipients listed within the budget are based on each line item's responsible entity.

Budget Options

In the Budget View Settings section, you can select different options to be visible by checking or unchecking the Options checkboxes.

Project Option

For clients with the Project Management module

The Project option displays the project associated with each grant budget line item.

Recipient Option

For clients with sub-recipient licenses

The Recipient option displays the recipient associated with each grant budget line item.

Grant Year Option

The Grant Year option displays budgeted items divided into the grant years over the grant's life. The number of grant years is based on the grant's start and end dates. Grants with durations of 365 days or less will show only one grant year.

Line Items Option

The Line Items option displays line items within each budget category. Hiding the line items option will display only budget categories.

Budget Categories

Budget categories can be selected on the Budget Settings page (***Grant Management → Grants → All Grants → select a grant → Post-Award tab → Budget Settings***). Budget categories can include Federal and custom categories. Federal budget categories are pre-defined and cannot be edited. Custom categories can be added in ***Administration → Lists → Budget Categories*** or can be created while adding categories to the expense budget.

Creating a Category-Based Budget

Organizational Administrators can create new budget categories while building the expense budget. Once a budget category has been added to the expense budget and line items have been added to the category, the category cannot be deleted from the Budget Settings. Categories that include line items can be deleted from the expense budget; deleting this type of category will delete both the category and the associated line items. To capture additional details for each category, line items may be added within the category.

To view a budget category's budgeted amount and budget cap, hover your cursor over the category name.

➲ **To add an existing budget category to the expense budget:**

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Budget***.
4. Click the **+ (Add icon)** next to Expense Budget.
5. In the *Category Details* section, select a **Category**. This list pulls from the categories created in Budget Settings.
6. Enter the **Budgeted Amount** for the entire category.
7. Click **Save**.

➲ **To add a new budget category from the expense budget:**

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Budget***.
4. Click the **+ (Add icon)** next to Expense Budget.
5. In the *Category Details* section, click the **Add New Category to Budget** link.
6. On the Grant Budget Settings page, click the **(Edit icon)** in the *Icon Bar*.
7. In the *Categories* section, select a **category** from the *Budget Categories* dropdown.
8. Click **Add**.
9. Click **Save**.

➲ **To edit a budget category from the expense budget:**

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Budget***.
4. Click the **(Edit icon)** next to a category name.
5. Update the information as necessary.
6. Click **Save**.

➲ **To delete a budget category from the expense budget:**

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Budget***.
4. Click the **(Delete icon)** next to a category name.
5. In the confirmation pop-up window, click **Delete**.

➲ **To unlock a locked budget category:**

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Budget***.
4. Click the **(Edit icon)** next to a locked category's name.
5. In the pop-up window, click **Unlock**.
6. Click **Save**.

Configuring Category Indirect Cost and Matching

Indirect Cost and Matching may be configured on a category basis. Once the category configurations are set, all line items within that budget category will inherit its settings. The indirect, cash match, and in-kind match percentages or amounts must be configured in the Budget Settings in order for category values to calculate properly.

Indirect Cost, Cash Match, and In-Kind Match can each be configured to **Disable**, **Enable**, or **Require**. If **Disable** is selected, that item cannot be tracked within the budget category. If **Enable** is selected, that item may be tracked within the budget category. If **Require** is chosen, that item must be tracked within the budget category. These options allow awardees to align their budget tracking with the funder's requirements on which items may include indirect or match, which items require them, and which items cannot include them.

Category Change Restrictions

Category Change Restrictions prevent expenses within a category from exceeding the capped amount. By entering a value and selecting **Do not allow expenses to exceed**, expenses cannot be loaded or manually added in excess of the cap amount.

Category Spending Alerts

Category Spending Alerts send automated notifications to the Grant Manager whenever a budget category is under or over allocated to line items during a grant tracking period or throughout the grant's life. Multiple spending alerts may be created depending on the grant manager's preference. Tracking period spending alerts may be configured as either a dollar amount or percentage. Life-of-grant spending alerts may be sent based on the percent of expenses tracked against the total category budget.

To configure Tracking Period Spending Alerts:

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Budget***.
4. Click the **(Edit icon)** next to a category.
5. In the *Spending Alerts* section, check the **Per Tracking Period** checkbox.
6. Add **Under Budget amount** in dollars or percentage.
7. Add **Over Budget amount** in dollars or percentage.
8. Click the **+ (Add icon)** to create additional alerts.
9. Click **Save**.

To configure Life-of-Grant Spending Alerts:

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Budget***.
4. Click the **(Edit icon)** next to a category.
5. In the *Spending Alerts* section, check the **Life of Grant** checkbox.
6. In the *Within % of Total Budget* field, add the **percent** (in decimal format).
7. Click the **+ (Add icon)** to create additional alerts.
8. Click **Save**.

Locking vs. Saving Budget Categories

Budget categories may be either saved as unlocked or locked. Locking a category prevents changes from being made to the category details. The **(Locked icon)** will appear next to a locked category. Line items within a locked category can be edited. Locked categories may be unlocked for editing by the Grant Manager, Department Administrators, and Organizational Administrators.

Indirect as a Category
For grants that track indirect costs, an automatically generated Indirect category will appear on the Expense Budget. The Indirect category will appear as locked as is not editable.

Line Items
Budget line items are the planned expenses related to a grant. Line items contain a greater level of detail than budget categories, such as associated GL accounts, responsible individuals, and attachments. Multiple line items may exist within one category. Line items may be connected to a budget category, or may be housed in the Uncategorized area.

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

Line Item Types
Line Items may be categorized as Personnel, Non-Personnel, or 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.

Adding a Line Item
When creating a line item, users select the line item type as Personnel, Non-Personnel, or Benefit. Fields may vary based on the line item type.

Adding Personnel Line Items
Personnel line items capture planned expenses related to staff compensation funded by the grant and/or the grant's match. This line item type can indicate a specific staff person that is being funded by a grant, or can be planned with the staff position only, selecting an employee at a later date.

For clients with sub-recipient licenses, sub-recipients may be selected as a responsible individual type; this list pulls from the sub-recipients connected to the grant.

➲ **To add a personnel line item for known employee:**

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → 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. If the employee being paid by the grant is known, select the **Employee name**. This list pulls from *Contacts → Staff*.
7. Add the **Position** (optional).
8. Add the amount of funded **Salary**.

Note: If the employee selected has compensation history on their Staff record in AmpliFund, the Salary will default to their compensation amount for the period. The Designation to Awarded and Designation to Pending Grants percentages show the percent of the staff person's salary already designated to awarded or pending grants' personnel line items.

9. Add **Benefits** and **Direct Cost** (optional).
10. Check the **Exclude From Match** and **Exclude From Indirect** checkboxes as necessary.
11. Check the **No Salary Data Used for Staff** as necessary. If **No Salary Data Used for Staff** is unchecked, additional fields will be available:
    a. Add **Designation To This Grant percentage** (in decimal format) to update the salary amount calculated in the *Salary* field (optional).

Note: The Designation To This Grant *field allows users to plan the budgeted line item as a percent of a staff person's salary. If the* Designation To This Grant *percent is changed, the salary amount will automatically update to reflect that percent of their salary. This field is only available if the **No salary data used for staff** checkbox is unchecked.*

12. Select the **Responsible Type**.
13. Select the **Responsible Individual** or **Responsible Sub Recipient**. This list pulls from *Contacts → Staff* or *grant → Post-Award → Sub-Award*, respectively.
14. Select a **Project Line Item** (optional).
15. Add a **Description** (optional).
16. Click **Create**.

➲ **To add a personnel line item for an unknown employee:**

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → 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. If the employee being paid by the grant is unknown, check the **Choose employee at later date** checkbox.
7. Add a line item **Name**.
8. Add the **Position** (optional).
9. Add the amount of funded **Salary**.
10. Check the **Exclude From Match** and **Exclude From Indirect** checkboxes as necessary.
11. Check the **No Salary Data Used for Staff** as necessary. If **No Salary Data Used for Staff** is unchecked, additional fields will be available:
    a. Add **Designation To This Grant percentage** (in decimal format) to update the salary amount calculated in the *Salary* field (optional).

Note: The Designation To This Grant *field allows users to plan the budgeted line item as a percent of a staff person's salary. If the* Designation To This Grant *percent is changed, the salary amount will automatically update to reflect that percent of their salary. This field is only available if the **No salary data used for staff** checkbox is unchecked.*

12. Select the **Responsible Type**.
13. Select the **Responsible Individual** or **Responsible Sub Recipient**. This list pulls from *Contacts → Staff* or *grant → Post-Award → Sub-Award*, respectively.
14. Select a **Project Line Item** (optional).
15. Add a **Description** (optional).
16. Click **Create**.

For more information about capturing compensation history, see the ***AmpliFund Contact Management*** guide.

Adding Non-Personnel Line Items

Non-Personnel line items capture planned expenses for budget items that do not fund staff salary or staff benefits. Examples of non-personnel line items include supplies, training, and travel.

➲ **To add a non-personnel line item:**

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → 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 **Exclude From Match** and **Exclude From Indirect** checkboxes as necessary.
9. Select the **Responsible Type**.
10. Select the **Responsible Individual** or **Responsible Sub Recipient**. This list pulls from *Contacts → Staff* or *grant → Post-Award → Sub-Award*, respectively.
11. Select a **Project Line Item** (optional).
12. Add a **Description** (optional).
13. Click **Create**.

Adding Benefit Line Items

If benefit items are not budgeted per each grant-funded employee, standalone benefit line items may be added to the expense budget. If benefits are budgeted per each grant-funded employee, see Benefits.

Note: Before you can add a benefit line item, Benefit Types must be added in the grant's Budget Settings in the Benefits section.

To add a benefit line item:

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → 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 the **Benefit Type**.
7. Add **Direct Cost**.
8. Check **Exclude From Match** and **Exclude From Indirect** checkboxes as necessary.
9. Select the **Responsible Type**.
10. Select the **Responsible Individual** or **Responsible Sub Recipient**. This list pulls from *Contacts → Staff* or *grant → Post-Award → Sub-Award*, respectively.
11. Select a **Project Line Item** (optional).
12. Add a **Description** (optional).
13. Click **Create**.

Line Item Tabs

Multiple tabs appear across the top of each line item's creation page to capture additional information about each line item. The only tab that contains required fields is the *General* tab. The other tabs provide areas to capture optional line item information.

General

The *General* tab allows users to create a new line item or edit an existing line item. This tab contains basic information to include for each line item, as well as required fields.

Financials

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.

*Note: In order to associate a line item with GL accounts, the accounts must exist in **Administration → Lists → GL Accounts**.*

Allocations

Allocations provide a means to spread a line item across the grant years or months. By default, the line item will be evenly spread throughout the grant's life. The ↔ (Spread Evenly icon) resets the line item allocations to an even monthly spread. The (Clear icon) removes all allocations, and is recommended to use if a line item is only planned for a small portion of the grant's life.

To configure the Financials tab:

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Budget***.
4. Click the **(Edit icon)** next to a line item.
5. In the *Financials* tab, add the **Cash Match Amount** and **In-Kind Match Amount** in dollars or percentages.
6. Select a **GL Account**. This list pulls from *Administration → Lists → GL Accounts.*
7. Click **Add**. Additional GL Accounts can be added if necessary.
8. Select **Monthly** or **Yearly** allocation.
9. In the allocate section, the line item amounts may be evenly or unevenly spread.
    a. To add evenly spread line item amounts:
        i. Click the **(Spread Evenly icon).**
    b. To add uneven line item amounts:
        i. Click the **(Clear icon)** to remove all allocations.
        ii. Add **line item amounts**.
10. Click **Save**.

Benefits

The *Benefits* tab only appears on personnel line items where benefits are planned and spent on a per-staff basis. If benefits are not configured on a per-staff basis, see Adding Benefit Line Items.

Note: Before you can add a type of benefit to a personnel line item, the benefit type must be added in the grant's Budget Settings in the Benefits *section.*

To configure the Benefits tab:

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Budget***.
4. Click the **(Edit icon)** next to a line item.
5. In the *Benefits* tab, select the **Supported Benefit Type**.
6. Click **Add**. Additional Benefit Types can be added if necessary.
7. Add the benefit **Amount** in dollars or percentages.
8. Check **Exclude From Match** and **Exclude From Indirect** checkboxes as necessary.
9. Click **Save**.

To remove a planned benefit:

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Budget***.
4. Click the **(Edit icon)** next to a line item.
5. In the *Benefits* tab, click the **(Delete icon)** next to a benefit.
6. Click **Save**.

Configuration

The *Configuration* tab allows users to set a budget cap and set spending alerts. Category and line item configurations are independent of each other, and can be created on a per-line item basis.

Line item spending alerts send automated notifications to the Grant Manager whenever a line item is underspent or overspent during a grant tracking period or throughout the grant's life. Tracking period spending alerts may be configured as either a dollars or percentages. Life of grant spending alerts may be sent based on the percent of expenses tracked against the total category budget.

To configure Expense Cap:

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Budget***.
4. Click the **(Edit icon)** next to a line item.
5. In the *Configuration* tab, add the **Expense Cap**.
6. Check the **Do Not Allow Expenses To Exceed** checkbox as necessary.
7. Click **Save**.

To configure Tracking Period Spending Alerts:

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Budget***.
4. Click the **(Edit icon)** next to a line item.
5. In the *Configuration* tab, check the **Per Tracking Period** checkbox.
6. Add the **Under Budget** alert amount in dollars or percentages.
7. Add the **Over Budget** alert amount in dollars or percentages.
8. Click the **+ (Add icon)** to create additional alerts as needed.
9. Click **Save**.

To configure Life-of-Grant Spending Alerts:

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Budget***.
4. Click the **(Edit icon)** next to a line item.
5. In the *Configuration* tab, check the **Life of Grant** checkbox.
6. Add the **Within % of Total Budget** alert percentage (in decimal format).
7. Click the **+ (Add icon)** to create additional alerts as needed.
8. Click **Save**.

Attachments

The *Attachments* tab gives users a way to include files associated with that line item.

To upload an attachment:

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

To delete an uploaded attachment:

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Budget***.
4. Click the **(Edit icon)** next to a line item.
5. In the *Attachments* tab, click the **(Delete icon)** next to a file name.
6. Click **Save**.

Locking vs. Saving Line Items

Line items may be either saved as unlocked or locked. Locking a line item prevents changes from being made to the category details. The **(Locked icon)** will appear next to a locked category. Locked line items may be unlocked for editing by the Grant Manager, Department Administrators, and Organizational Administrators.

Editing a Line Item

Line items may be edited if they are unlocked. All tabs within each line item may be updated.

To edit a line item:

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Budget***.
4. Click the **(Edit icon)** next to a line item.
5. Update the information as necessary.
6. Click **Save.**

Deleting a Line Item

Existing line items may be deleted as long as staff members have not tracked any expenses against those line items, and have not added time to timesheets. A locked line item must first be unlocked in order to delete the line item. Line items can only be unlocked by Grant Managers, Department Administrators, and Organization Administrators.

To delete a line item:

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Budget***.
4. Click the **(Delete icon)** next to a line item.
5. In the confirmation pop-up window, click **Delete.**

Expenses

Expenses are charges spent against a planned grant budget line item. Expenses can be added at any time, if given permission to do so. Expenses can be created through the *Activity* module (see the ***AmpliFund Activity Management Guide*** for more details) or *Post-Award tab → Expenses*.

Spending Alerts

Spending alerts can be created for budget categories or line items. As line items are created within a category and expenses are tracked against line items, the grant manager may receive spending alerts based on the spending alert configurations. All spending alert notifications are sent from the email address no-reply@gotomygrants.com.

Adding Expenses

As a user spends down against budgeted line items, that line item's partial or whole completion may be marked at any time by adding an expense record. Expenses may be added through *Activity → Expenses*, or from the grant's Expenses page or budget. Expenses may only be added by Responsible Individuals and Administrators (if the grant allows manual expense entry).

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

To add an expense:

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Expenses***.
4. In the *Expenses* section, click the **+ (Create icon**) next to *All Expenses*.
5. In the *General tab*, select a **Grant.** This list pulls from *Grant Management → Grants → All Grants.*
6. Select a **Category**. This pulls from budget categories from the selected grant.
7. Select a **Line Item**. This pulls from budget line items from the selected category.
   a. For personnel line items, add **Salary.**
   b. For non-personnel and benefit type line items, add **Direct Cost.**
8. Check the **Exclude From Match checkbox** as needed.
9. Select the **Expense Date.**
10. Select the **Expense Status**.
    - **New:** The expense has not been added to AmpliFund before.
    - **Matched:** The expense has been added both manually and by import.
    - **Reviewed:** The expense has been reviewed.
    - **Payment Requested:** The expense has been requested and invoiced by the funder.
    - **Paid:** The expense has been paid.
    - **Denied:** The expense has been denied and was not paid by the funder.
11. In the *Payee* dropdown, select the **Organization Type,** then select **organization.** This list pulls from *Contacts → Organizations.* If the organization is not in AmpliFund, click **Create New** and add the **organization name**. The organization will be added to *Contacts → Organizations* once the expense is created.
12. Add a **Description** (optional).
13. In the *Financials tab*, add **Cash Match Amount** and **In-Kind Amount** in dollars or percentage (optional).
14. In the *Benefits tab* (for personnel line items), add benefit **Amounts** in dollars or percentage (optional).
15. In the *Attachments tab*, click **Choose File** to select a file from your computer (optional).
16. Click **Save**.

Viewing Expenses

All expenses for the grant can be viewed from *Post-Award tab → Expenses*. From this page, expenses can be filtered by time, category, or line item. In addition, Grant Start Date, Grant End Date, GL Account, Line Item, Total Budgeted, Total Expensed, Total Remaining, Responsible Individual, Created By, Payee, Cash Match, and In-Kind information can be shown or hidden.

To view an expense:

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Expenses***.
4. In the *Expenses View Settings* section, select a **timeframe** or **custom dates** to filter (optional).
5. Select a **Category** to filter (optional).
6. Select a **Line Item** to filter (optional).
7. Click **Run** (optional).
8. Check **options** checkboxes to show or hide information (optional).
9. In the *Expenses* section, click a **description**.

Editing Expenses

Expenses may be edited by Responsible Individuals and Administrators (if the grant allows manual expense entry). Editing expenses is not an option for grants set to **Import Only**. Expenses are not editable if their Tracking Interval is closed.

To edit expenses:

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Expenses***.
4. Click the **(Edit icon)** next to an expense description.
5. Update the information as necessary.
6. Click **Update.**

Deleting Expenses

Expenses may be deleted by Responsible Individuals and Administrators (if the grant allows manual expense entry). Deleting expenses is not an option for grant set to **Import Only**. Expenses cannot be deleted if their Tracking Interval is closed.

To delete expenses:

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Expenses***.
4. In the *Expenses* section, check the checkbox next to a line item.
5. Click the **(Delete icon)** under *Actions*.
6. In the confirmation pop-up window, click **Delete.**

Revenue Budget Planning

The revenue budget allows users to plan for anticipated grant revenue. This includes grant funding, cash match, and in-kind match.

Grant Funding

The *Grant Funding* section in the Revenue Budget displays the grant's total awarded amount. This amount is evenly split among grant years.

Match

In the pre-award submission budget, the *Cash Match* and *In-Kind Match* line items display the grant's cash match requirement and the in-kind match requirement. In the post-award budget, the *Cash Match* and *In-Kind Match* fields display the grant's cash match amount and in-kind match amount. These amounts are split evenly among grant years. If no amounts are entered in the matching fields, Match does not appear on the Revenue Budget.

Copying Performance Plans

Users can copy pre-award performance goals and strategies into the Post-Award Performance Plan. The copy function is only available if a grant contains pre-award items and is in a post-award status, such as Approved or Extended.

Once a performance plan has been copied, goals and strategies may be edited, deleted, or created in the Post-Award Performance Plan.

To copy a performance plan:

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Pre-Award tab → Submission Performance Plan***.
4. Click the **(Copy icon)** in the *Icon Bar*.
5. In the confirmation pop-up window, click **Copy**.
6. Open the ***Post-Award tab → Performance Plan***.
7. Update the information as necessary.

Sub-Awards

For clients with Sub-Recipient Licenses

Sub-Award Icons

Icon	Description
	Print
	Help
	Add
	View Award
	Edit
	Delete

Creating Awards

Sub-awards may be created and managed through the ***Post-Award → Sub-Awards*** menu. Prior to creating a sub-award, one or more sub-recipient organizations must be created in the ***Administration → License Information → Sub-Recipients tab***. Once the sub-recipient is created, Sub-Awards may be activated, giving the sub-recipient organization access to a mini-license of AmpliFund.

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

To create a sub-award:

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Sub-Awards***.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. In the pop-up window, select an award **Recipient**. This list pulls from *Administration → License Information → Sub-Recipients tab***.**
6. Select your organization's **Responsible Person** for the award. This list pulls from *Contacts → Staff*.
7. Add an **Award Identification Number** (optional).
8. In the *Awarded Date* field, select the **date the award will be given to the recipient**.
9. Add the total **Length of Award** in years and any additional months.
10. Select the award **Start Date**. The *End Date* will populate automatically based on the award Start Date and Length of Award.
11. Add an award **Description** and **Unique Identifier** (optional).
12. Select an award *Status* as **Enabled**.
13. In the *Funding Information* section, add the **Total Awarded Amount.**

14. Click **Create**.

Adding Award Details

Once you have created a sub-award, you can add award details and settings. The grant's Details page allows you to provide more information about the award and its budget, and allows you to set up task reminders. Once you have activated the award, the recipient will receive an email notification that includes an invite to AmpliFund to track and manage the award.

Note: You should update the default Performance Plan Settings and Budget Settings before you activate the award.

To update award performance plan settings:

1. Open ***Grant Management → Grants Awarded***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Performance Plan Settings***.
4. In the *Recipient Settings* section, select **performance plan permissions** in the *Performance Plan Creation* dropdown. By default, both the funder and recipient can edit performance plans.
5. Select **achievement permissions** in the *Achievement Creation* dropdown. By default, both the funder and recipient can create achievements.
6. In the *Goal Types* section, select the **goals types** that will be available to the recipient. All goal types are selected by default.
7. Click **Save.**

To update award budget settings:

1. Open ***Grant Management → Grants Awarded***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Budget Settings***.
4. Click the **(Edit icon)** in the *Icon Bar*.
5. In the *Recipient Settings* section, select **budget permissions** in the *Budget Creation* dropdown. By default, both the funder and recipient can edit the budget.
6. Select **expense permissions** in the *Expense Creation* dropdown. By default, both the funder and recipient can create expenses.
7. Add the **Matching** information for the award. The fields may vary depending on your selections.
8. In the *Indirect Cost Rate* section, select if you will **Track Indirect Cost Rate**. If you select **Yes**, add the **Rate Type, Indirect Rate**, **Start Date**, and **End Date**. To add additional rates, click the **+ (Add icon).**
9. In the *Categories* section, select a **budget category** and click **Add.** Repeat as necessary. Click the **(Delete icon)** to remove.
10. Check the **Allow Recipient to Create Categories** checkbox if recipients will be able to create their own budget categories.
11. In the *Benefits* section, select how **benefits will be added** in the *Add Benefits By* dropdown. Benefits can be added by **Personnel** line item, or by **Benefit Type**.
12. In the *Supported Benefit Type* dropdown, select a **benefit type** and click **Add**. Repeat as necessary. Click the **(Delete icon)** to remove.
13. Check the **Allow Recipient to Set Up Benefits** checkbox if recipients will be able to create their own benefit types.
14. Click **Save**.

To activate an award:

1. Open ***Grant Management → Grants Awarded***.
2. Click a **grant name**.
3. Click the **(Edit icon)** in the *Icon Bar*.

4. Update the information as necessary.
5. In the *Award Information* section, select **Budget Tracking Interval** and **Performance Tracking Interval**.
6. Click **Activate.**

To activate multiple awards:

1. Open ***Grant Management → Grants Awarded***.
2. Click the **(Activate Award icon)** in the *Icon Bar*.
3. Select **users** or check the **Select All checkbox**.
4. Click the **(Activate Award icon)** under *Actions*.
5. Click **Activate.**

Active Awards

Once the recipient logs in to AmpliFund and accepts the award, the award becomes active. From the award Details page, you can view the recipient award name, recipient Grant Manager's contact information, and recipient description. You can also add amendments, view awarded amount history, and set default reminders for tasks, budget, and performance.

To view an active award:

1. Open ***Grant Management → Grants Awarded***.
2. Click a **grant name**.
   --OR--
1. Open ***Fund Management → Awards.***
2. Click the **(View Award icon)** next to a lead recipient name.

To edit an active award:

1. Open ***Grant Management → Grants Awarded***.
2. Click a **grant name**.
3. Click the **(Edit icon)** in the *Icon Bar*.
4. Update the information as necessary.
   Note: Some of the information can only be edited by the recipient.
5. Click **Save**.
   --OR--
1. Open ***Fund Management → Awards.***
2. Click the **(View Award icon)** next to a lead recipient name.
3. Click the **(Edit icon)** in the *Icon Bar*.
4. Update the information as necessary.
   Note: Some of the information can only be edited by the recipient.
5. Click **Save**.

Payment Authorizations

For clients with Sub-Recipient Licenses

Payment authorizations can be created in AmpliFund to keep track of approvals to pay a payment request or invoice to a sub-recipient organization. When creating a payment authorization, the Grant Manager or Administrator may indicate the recipient organization, authorization date, payment amount, payment date, and a description.

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

Funding Opportunities

For clients with the Competitive Award Management module

Funding Opportunities provide an area to manage competitive processes for sub-awarding a grant, or creating an award that has the grant as a funding source. Application forms and templates can be used to create the opportunity; potential sub-recipient organizations may then apply to the opportunity for awards.

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

Tracking Periods

Tracking periods allows managers and admin users to internally track the health and progress of their grants in regularly segmented intervals over the lifetime of the grants. Tracking periods can include expenses, achievements, timesheets, and program income. Grant Managers, Department Admin, and Organizational Administrators can view, create, edit, and close tracking periods. Organizational Administrators can reopen closed tracking periods.

Tracking periods may be related to a funding organization's reporting requirements. Recipient clients will use reporting periods to send grant progress directly to their AmpliFund funding organization. For more information, see Reporting Periods.

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

Tracking Periods Icons

Icon	Description
🖶	Print
i	Help
+	Create

➲ **To view tracking periods:**

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Tracking Periods***.
4. Click a **tracking period start date**.

➲ **To create tracking periods:**

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Tracking Periods***.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. In the pop-up window, select the **types of tracking periods** to include. This could include Expenses, Achievements, Timesheets, and/or Program Income.
6. Select a **period of time**.
7. Click **Save**.
8. Add Expense, Achievements, Timesheets and/or Program Income information.
9. Click **Save**.

➲ **To close tracking periods:**

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Tracking Periods***.
4. Click an open **tracking period start date**.
5. Click **Close** to close the tracking period.
6. In the confirmation pop-up window, click **Close.**

Once a tracking period is closed, users may not add or edit achievements, expenses, timesheets, or program income within the closed tracking period.

Reporting Periods

For clients with Sub-Recipient Licenses

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

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

Reporting Periods Icons

Icon	Description
🖶	Print
i	Help
+	Create

To view reporting periods:

1. Open ***Grant Management → Grants → All Grants*** or ***Grant Management → Grants Awarded***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Reporting Periods***.
4. Click a **reporting period start date**.

To create reporting periods (for recipient clients):

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Reporting Periods***.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. In the pop-up window, select a **grant**.
6. Select the **types of reporting periods** to include. This could include Expenses and/or Achievements.
7. Select a **period of time**.
8. Click **Save**.
9. Add Expense and/or Achievements information.
10. Click **Save**.

To close reporting periods (for recipient clients):

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Reporting Periods***.
4. Click an open **reporting period start date**.
5. Click **Close** to close the reporting period.
6. In the confirmation pop-up window, click **Close.**

Once a reporting period is closed, users may not add or edit achievements or expenses within the closed reporting period.

➲ **To reject reporting periods (for funder clients):**

1. Open ***Grant Management → Grants Awarded***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Reporting Periods***.
4. Click a **reporting period start date**.
5. Click **Reject** to reject the reporting period and send it back to the recipient for editing.

Payment Requests

Payment requests allows users to create cash advances or reimbursement requests for their funding organizations. The grant's payment request type can be selected from the Grant Details page. Payment requests can be created from closed tracking or reporting periods, or they can be created independently at any time. Payment requests can be tracked in AmpliFund and exported to PDF.

Organizational Administrators and Grant Managers can view, create, edit, and delete payment requests. Department Admin, Department Users, and Additional Staff can view payment requests.

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

Reporting Periods Icons

Icon	Description
🖶	Print
ℹ	Help
+	Create/Add
✎	Edit
🗑	Delete
💵	Payment Request
📄	Export to PDF

➲ **To view payment requests:**

1. Open ***Grant Management → Grants → All Grants*** or ***Grant Management → Grants Awarded***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Payment Requests***.
4. Click a **payment request name**.

➲ **To create cash advance payment requests:**

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Payment Requests***.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. In the pop-up window, add a **Name**.
6. If this is a final payment request, check the **Yes checkbox**.
7. Click **Create**.
8. In the *Payment Request Information* section, select a **Date Created** and a **Date Submitted** (optional).
9. Select a **Payment Request Status**.
10. In the *Expenses* section, add **Projected Expenses**.
11. In the *Contributions* section, add projected **Match Contribution** (optional).
12. In the *Totals* section, add **Requested Amount.**
13. If the payment request is being added as a record and the funding organization has already approved, add the **Approved Amount**.
14. In the *Details* section, add **Comments** (optional).
15. Click **Choose a file** to add Attachments (optional).
16. Click **Save**.

➲ **To create reimbursement payment requests:**

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Payment Requests***.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. In the pop-up window, add a **Name**.
6. Select **closed tracking or reporting periods** to include (optional).
7. If this is a final payment request, check the **Yes checkbox**.
8. Click **Create**.
9. In the *Payment Request Information* section, select a **Date Created** and a **Date Submitted** (optional).
10. Select a **Payment Request Status**.
11. In the *Costs* section, update budget category totals as necessary. These amounts pull from reviewed expenses in the closed tracking or reporting period.
12. In the *Additional Expenses* field, select a **Budget Category** and add **expense amount** (optional).
13. Add **Indirect** amount (optional).
14. In the *Contributions* section, add or update **Match Contribution** (optional)
15. Add or update **Program Income** (optional)**.**
16. In the *Totals* section, add **Requested Amount.**
17. If the payment request is being added as a record and the funding organization has already approved, add the **Approved Amount**.
18. In the *Details* section, add **Comments** (optional). These will be visible to the funder.
19. Click **Choose a file** to add Attachments (optional).
20. Click **Save**.

    --OR--

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Tracking Periods*** or ***Post-Award tab → Reporting Periods***.
4. Click the **(Payment Request icon)** next to a closed period name.
5. In the pop-up window, add a **Name**.
6. Select **closed tracking or reporting periods** to include (optional).
7. If this is a final payment request, check the **Yes checkbox**.
8. Click **Create**.

9. In the *Payment Request Information* section, select a **Date Created** and a **Date Submitted** (optional).
10. Select a **Payment Request Status**.
11. In the *Costs* section, update budget category totals as necessary. These amounts pull from reviewed expenses in the closed tracking or reporting period.
12. In the *Additional Expenses* field, select a **Budget Category** and add **expense amount** (optional).
13. Add **Indirect** amount (optional).
14. In the *Contributions* section, add or update **Match Contribution** (optional)
15. Add or update **Program Income** (optional).
16. In the *Totals* section, add **Requested Amount.**
17. If the payment request is being added as a record and the funding organization has already approved, add the **Approved Amount**.
18. In the *Details* section, add **Comments** (optional). These will be visible to the funder.
19. Click **Choose a file** to add Attachments (optional).
20. Click **Save**.

➲ **To approve payment requests (for funder clients):**

1. Open ***Grant Management → Grants Awarded***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Payment Requests***.
4. Click a **payment request name**.
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.

➲ **To reject payment requests (for funder clients):**

1. Open ***Grant Management → Grants Awarded***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Payment Requests***.
4. Click a **payment request name**.
5. Add **Comments** (optional). These will be visible to the recipient.
6. 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.

➲ **To export payment requests to PDF:**

1. Open ***Grant Management → Grants → All Grants*** or ***Grant Management → Grants Awarded***.
2. Click a **grant name**.
3. Open the ***Post-Award tab → Payment Requests***.
4. Click a **payment request name**.
5. Click the **(Export to PDF icon)** in the *Icon Bar*.

Grant Tools

The *Grant Tools* tab provides access to the grant's email manager, tasks, documents, and notes. Items created in *Tools* will be connected to that grant record.

Email Manager

From the *Email Manager*, users may create and send emails. The emails will be sent to the recipients' primary email addresses and will also appear in ***Activity → Message Center***. Additionally, any emails sent from the grant email manager can be viewed from the ***Tools tab → Email Manager***.

➲ **To create an email:**

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Tools tab → Email Manager***.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. In the *To* field, select the **email recipient**. This list pulls from *Contacts → Individuals* and *Contacts → Staff*.
6. In the *CC* and *BCC* fields, select **additional recipients** (optional). These lists pull from *Contacts → Individuals* and *Contacts → Staff*.
7. Add the message **Subject**.
8. Add the **email message** in the *Html Body* field.
9. In the *Attach New* field, click **Select file…** to add an attachment from your computer (optional).
10. In the *Attachments* dropdown, select files from the *Documents* module to attach (optional).
11. Click **Send**.

➲ **To view an email:**

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Tools tab → Email Manager***.
4. Hover over an **email name** to show the dropdown menu arrow.
5. Click the **dropdown arrow**.
6. Select **View**.
   --OR--
1. Open ***Activity → Message Center***.
2. Open the ***Inbox tab*** or ***Outbox tab.***
3. Click the **message name.**

Tasks

From the *Tasks* list, users may create and assign tasks to other staff. After creation, tasks will appear on that staff's AmpliFund calendar, and they may receive email reminders related to that task.

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

➲ **To create a task:**

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Tools tab → Tasks***.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. Add the task **Name**.
6. Select the **Task Type**.
7. Add the task **Description** (optional).
8. Select the **Task Status.**
9. Select the **Responsible Delegation**. This defaults to the Grant Manager. This list pulls from *Contacts → Staff*.
10. Select **Additional Recipients** (optional). This list pulls from *Contacts → Staff*. Additional Recipients will receive email reminds and can view the task in *Activity → Tasks*. They can also mark the task as complete.

11. Select a **Due Date**. This defaults to the current date.
12. Select **Task Reminders**. These reminders will schedule automated email reminders to the Responsible Delegation and Additional Recipients about the task. Staff will not receive reminders once the task is marked complete.
13. Click **Create**.

➲ **To view a task:**

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Tools tab → Tasks***.
4. Click a **task name**.

--OR--

1. Open ***Activity → Tasks***.
2. Click a **task name**.

Documents

Within *Documents*, grant-specific files and folders can be stored and accessed. Once a grant has been created, AmpliFund automatically creates a grant folder that is accessible from the grant or from the *Documents* module.

To learn more about document management, see the ***AmpliFund Document Management Guide***.

➲ **To upload a document:**

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Tools tab → Documents***.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. In the *Create* dropdown menu, select **Document**.
6. In the *In Folder* dropdown menu, select a parent **folder**. This will be the destination folder for the document.
7. Click **Select Files...** to upload a file from your computer.
8. Click **Create**.

➲ **To view a document:**

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open the ***Tools tab → Documents***.
4. Click a parent **folder name** if necessary.
5. Click a **document name**.

-- OR --

1. Open ***Documents → Grants***.
2. Click a **grant name**.
3. Click a parent **folder name** if necessary.
4. Click a **document name**.

Notes

Additional information related to the grant may be stored as a *Note*. Each note may include a title, note date, text, and an attachment.

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

To create a note:

1. Open ***Grant Management*** → ***Grants*** → ***All Grants***.
2. Click a **grant name**.
3. Open the ***Tools tab*** → ***Notes***.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. Add a **Title**.
6. Select a **Note Date** (optional).
7. Select a **Note Type** (optional). This list pulls from *Administration* → *Lists* → *Note Types*.
8. Add the **note Body**.
9. Click **Select files...** to upload a file from your computer (optional).
10. Click **Create**.

To view a note:

1. Open ***Grant Management*** → ***Grants*** → ***All Grants***.
2. Click a **grant name**.
3. Open the ***Tools tab*** → ***Notes***.
4. Click a note **Title**.

Grant Workflow

For clients with the Workflow module

Grants may be enrolled in workflows to manage business processes, such as grant application approvals or report routing. Additionally, grant budgets and grant performance plans may be enrolled in workflows to manage specific budget and performance plan review processes.

To learn more about workflows, see the ***AmpliFund Workflow Guide***.

Custom

For clients with Advanced Data Collection

Custom forms and form extensions can be added to record through the record's *Custom tab*. Custom forms can be accessed by the ***Custom tab>form display name***. Form extensions will appear as additional custom sections on an existing record form. For more information on custom forms and form extensions, see the Advanced Data Collection Guide.

Custom Forms and Form Extensions

The form's fields can be shown or hidden as additional columns on the form's list page, as well as form *Id*, *Created By*, *Created Date*, *Modified By*, and *Modified Date* columns.

To fill a custom form:

1. Open a primary object's **record**, such as a grant, opportunity, project, or fund.
2. Open the **Custom tab>form name**.
3. Click the **+ (Add icon)** in the *Icon Bar*.
4. Add information as necessary.
5. Click **Create**.

To add custom forms and form extensions to an object:

1. Open an **object record**.

2. Open the **Custom tab>Form Configuration**.
3. In the *Object Configuration* section, check the **form checkbox** to add the form to the primary object record, or check the **form extension checkbox** to add the form extension to the primary object record's detail page.
4. In the *Related Objects (Form Extensions)* section, check the **form extension checkbox** to add the form extension to a secondary object on the record.
5. Click **Save**.

Appendix

Grant Field Definitions

When creating a new award or editing an existing award, several fields on the grant details page are required or become required, based on the award's status. If a grant is changed from a pre-award status, such as "Pending" to a post-award status, such as "Approved," some post-award fields become required. These conditional fields are denoted with (*) next to the field name. Required fields are marked with a * next to the name.

Grant Information

Field Label	Field Definition
Name*	Title of the award or program; Name is how grant is labeled in grant lists, and when pulling grant reports
Grantor*	Grant funder; pulls from Organizations list in *Contacts → Organizations*; grantor must first be on Organizations list in order to select in Grantor field
RFP ID Number	Identifier provided by the funder that uniquely identifies the RFP, or Request for Proposal
Funding Opportunity Number	Identifier provided by funder that uniquely identifies the funding opportunity
CFDA Number	Catalog of Federal Domestic Assistance Number; identifies Federal program that is the funding source for the opportunity; required if FFATA Reporting Needed

Pre-Award

Field Label	Field Definition
Letter of Intent Required*	Dropdown: Yes, No; indicates if funder requires submission of letter of intent
Letter of Intent Due Date (*)	Only appears if Letter of Intent Required is set to "Yes"; date selected creates Event on Grant Manager's calendar
Proposed Length of Award Years and Months	Length of award proposed in grant; for grants with non-annual lengths, the Months field captures additional months; required for Pre-Award grants
Proposal Open Date	Date Selector; Date which funder begins accepting applications
Proposal Close Date	Date Selector; Date which funder stops accepting applications
Proposal Submitted Date	Date Selector; Date application is submitted
Projected Receipt Date*	Date Selector; Expected date of award notification/receipt
Grant Writer(s)	Selectable from *Contacts → Staff*; may be one or more staff members who are writing or wrote the grant

Field Label	Field Definition
Departments(s) or Program(s)	Selectable from *Administration* → *System Security* → *Departments*; may be one or more departments related to award
Subject(s)	Selectable from *Administration* → *Lists* → *Subjects*; may be one or more subjects related to award
Additional Staff	Selectable from *Contacts* → *Staff* list; may be one or more staff members who have visibility into the grant
Project(s)	Visible for clients with *Project* module only; selectable from *Project Management* → *Projects*; may be one or more projects associated to the grant
Weight	Estimated likelihood of receiving grant; entered as a percentage

Pre-Award Budget

Field Label	Field Definition
Requested Amount	Amount requested from Grantor; entered as amount
Cash Match Requirement	Amount planned as Cash Match; entered as amount
In-Kind Match Requirement	Amount planned as In-Kind Match; entered as amount
Total Projected Budget	Calculated field summing up Requested Amount, Cash Match Requirement, and In-Kind Match Requirement

Description

Field Label	Field Definition
Description	Free text field
Award Details	Free text field
Eligibility Requirements	Free text field
Additional Information	Free text field

Status

Field Label	Field Definition
Award Status*	Dropdown menu indicating current phase in award's life; may be: Internal Review, Cancelled, To Be Submitted, Pending, Denied, Approved, Extended, Completed or Closed; Status impacts conditional fields and post-award tracking capabilities
Award Type*	Dropdown menu indicating categorization of award; may be: Grant, Internal Allocation, Contract, Loan, Cooperative Agreement
Denied Date (*)	Date selector indicating date award was denied

Post-Award

Field Label	Field Definition
Grant Manager*	Selectable from *Contacts* → *Staff*; person responsible for overseeing award's success; responsible for closing tracking intervals
Awarded Date	Date selector indicating date of award notification; required for Post-Award grants
Length of Award	Length of award received; for grants with non-annual lengths, the Months field captures additional months; required for Post-Award grants
Start Date	Date selector indicating date award begins
End Date	Date selector indicating date award ends
Close Out Date	Date selector indicating date award must be closed out by
Extension Approved Date (*)	Date selector indicating date award extension was approved by funder
Extended End Date (*)	Date selector indicating date award extension ends
Activity Code (NAICS or NTEE-NPC)	Relevant code used for the classification of the program services provided with the grant
Federal Agency and Organizational Element	Federal agency and organizational element identified in the award document or as instructed by the agency; required if FFATA Reporting Needed
Identifying Number Assigned by Federal Agency	Grant number assigned to the award by the Federal agency
Recipient Account Number	The account number or any other identifying number assigned by the recipient to the award; is not required by the federal agency
Payment Request Type*	Dropdown: Cash Advance, Reimbursement; this cannot be changed once a payment request is created
Record Program Income (*)	Dropdown: Yes, No; this field is only available for federally funded awards
Method Of Expenditure (*)	Only appears if Record Program Income set to "Yes"; Dropdown: Addition, Deduction; indicates how program income affects funder commitment
FFATA Reporting Needed (*)	Dropdown: Yes, No; this field is only available for federally funded awards
Budget Tracking Interval*	Selector may be: None, Monthly, Quarterly, Semi-Annually, or Annually; Grant Manager is assigned system generated tasks at the end of each Tracking Interval
Due Date for Budget Items	Specifies number of days after the close of the period that budget tracking interval is due
Performance Tracking Interval*	Selector may be: None, Monthly, Quarterly, Semi-Annually, or Annually; Grant Manager is assigned system generated tasks at the end of each Tracking Interval
Due Date for Performance Items	Specifies number of days after the close of the period that performance tracking interval is due
HR Actual Entry Method*	*For clients with Time and Effort module* - may be set to Manual or Import, or Import only *For clients without Time and Effort module* - set to Manual or Import

Field Label	Field Definition
	Manual or Import allows responsible staff on personnel budget line items to add, edit, and delete personnel expenses Import Only allows responsible staff on personnel budget line items to view line item and expenses, but cannot create, edit, or delete expenses; personnel expense data must be imported by an administrator
GL Actual Entry Method*	Selector may be: Manual or Import, or Import Only Manual or Import allows responsible staff on non-personnel budget line items to add, edit, and delete non-personnel expenses Import Only allows responsible staff on non-personnel budget line items to view non-personnel line item and expenses, but cannot create, edit, or delete expenses; expense data must be imported by an administrator
Financial Code	Unique grant financial code for importing expenses

Post-Award Budget

Field Label	Field Definition
Awarded Amount	Amount field; amount received from funder
View Awarded Amount History	Link which displays any changes made to Awarded Amount field and user name and date changed
Cash Match Amount	Amount field; amount of cash matching funds provided
In-Kind Match Amount	Amount field; amount of in-kind matching funds provided
Total Budget	Calculated field summing up Total Awarded Amount, Cash Match Amount, and In-Kind Match Amount

Default Settings for Sending Task Reminders

Field Label	Field Definition
Default Task Reminders	Selectors to configure default email reminders to responsible individuals on grant tasks
Default Budget Reminders	Selectors to configure default email reminders to responsible individuals on budget line items
Default Performance Reminders	Selectors to configure default email reminders to responsible individuals on performance goals

Record Information

Field Label	Field Definition
Unique Identifier	Free text field; captures code or identifier assigned to grant by another internal system for reference
Status*	Dropdown: Enabled, Disabled

Other Guides Referenced

- *AmpliFund Grant Research Guide*
- *AmpliFund User Interface Navigation Guide*
- *AmpliFund Competitive Award Management Guide*
- *AmpliFund Activity Management Guide*
- *AmpliFund Document Management Guide*
- *AmpliFund Contact Management Guide*
- *AmpliFund Administration Guide*
- *AmpliFund Workflow Guide*