AmpliFund™

Award Management

Contents

Award Management Overview

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

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

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

Icons

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

Fund Opportunities

For clients with Competitive Award Management module

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

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

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

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

How To View a Fund Opportunity

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

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

Note

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

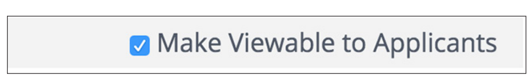
How To Add a Fund Opportunity

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

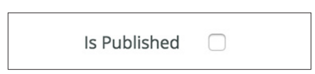
1. Open **Award Management>Fund Opportunities**.
2. Click the **+ (Create icon)** in the *Icon Bar*.

Opportunity Information

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



4. Add **Title**.
5. Add **Description** (optional).
6. Select **Fund Activity Category**. This list pulls from *Administration>Lists> Fund Activity Categories*.
7. Add **Category Explanation** or description (optional).
8. Select an **Opportunity Manager**. This list pulls from *Contacts>Staff*. Opportunity Managers can edit Opportunity Details and create, edit, and delete all items related to their opportunity, including application forms, and budget and performance plan templates. Additionally, Opportunity Managers can enroll opportunities and applications in workflows and will receive automated emails when applications have been submitted to their opportunity.
9. Select a **Posted Date**. This is the date a published fund opportunity will be available to applicants.
10. Select an **Archive Date**. This is the date a published fund opportunity will no longer be available to applicants.
11. Add a **Funding Opportunity Number** (optional). This is a reference number for the opportunity assigned by your organization.
12. Add a Catalog of Federal Domestic Assistance Number, or **CFDA Number** (optional).
13. Check the **Is Published checkbox** to publish the opportunity. A published opportunity will be available to applicants between the Posted and Archive Dates. We recommend that you only publish the opportunity after all changes to the opportunity have been made.

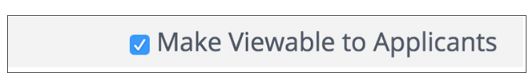


Note

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

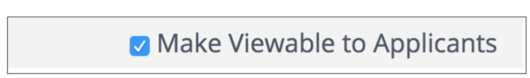
Funding Information

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

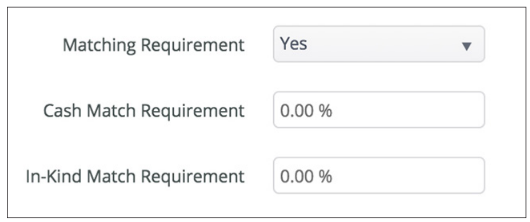


Award Information

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

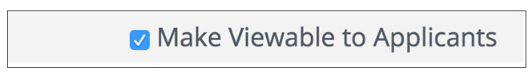


16. Add **Award Ceiling** (optional). This is the maximum amount a single award recipient may receive.
17. Add **Award Floor** (optional). This is the minimum amount a single award recipient may receive.
18. Select the expected **Award Start Date** (optional).
19. Select the expected **Award End Date** (optional).
20. Add the **Expected Number of Awards** (optional).
21. Select **Matching Requirement**.
    a. If *Yes*, add **Cash Match Requirement** and **In-Kind Match Requirement** percentages (in decimal format).



Submission Information

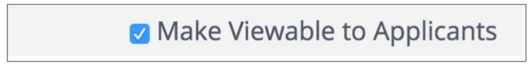
22. Uncheck the **Make Viewable to Applicants checkbox** to hide all information in the section to applicants.



23. Select **Submission Timeline Type**.
    - **One-Time:** Applications will only be accepted for a specified timeframe
    - **Rolling:** Applications will continuously be accepted after specified date
24. Select **Submission Open Date**. This is the date and time that applications will be accepted.
25. Add **Submission Close Date** (for one-time submissions). This is the date and time that applications will no longer be accepted.
26. Select **Time Zone** for submission open and close times.
27. Add **Submission Timeline Additional Information** (optional).
28. Check the **Allow Multiple Applications checkbox** to allow an organization to submit multiple applications.

Eligibility Information

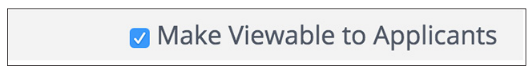
29. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.



30. Select **Eligibility Type**.
    - **Public:** Opportunity appears on funder's opportunity list in the Applicant Portal
    - **Private:** Opportunity does not appear on funder's opportunity list in the applicant portal and can only be accessed by URL link
31. Select **Eligible Applicants**. These are organization types that can apply to the opportunity.
32. Add **Additional Eligibility Information** (optional).

Additional Information

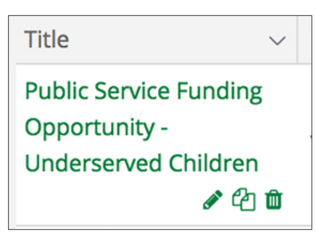
33. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.



34. Add **Additional Information URL** (optional). This is a website link that may provide more information for applicants.
35. Add **Additional Information URL Description** (optional).
36. Click **Create.** This will also create a Public Link that can be used to access the opportunity on the Applicant Portal. The link will only be active for applicants when the opportunity has been published.

How To Edit a Fund Opportunity

1. Open **Award Management>Fund Opportunities**.
2. Click the **(Edit icon)** next to a fund opportunity.

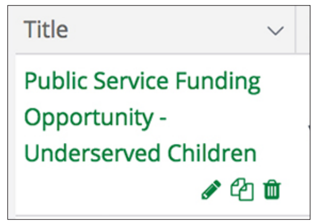


3. Update the information as necessary.

4. Click **Save**.

How To Delete a Fund Opportunity

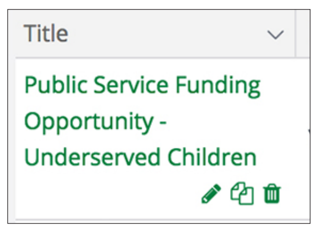
1. Open **Award Management>Fund Opportunities**.
2. Click the **(Delete icon)** next to a fund opportunity.



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

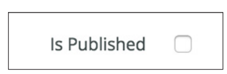
How To Publish a Fund Opportunity

1. Open **Award Management>Fund Opportunities**.
2. Click the **(Edit icon)** next to a fund opportunity.



Opportunity Information

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



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

Icons

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

Grant Opportunities

For clients with Competitive Award Management module

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

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

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

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

How To View a Grant Opportunity

Grant opportunities can be funded fully by grants only.

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

Note

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

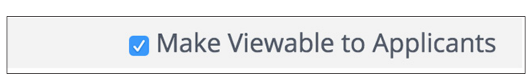
How To Add a Grant Opportunity

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

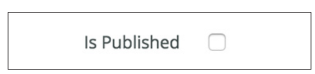
1. Open **Grant Management>Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Grant Opportunities**.
4. Click the **+ (Create icon)** in the *Icon Bar*.

Opportunity Information

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



6. Add **Title**.
7. Add **Description** (optional).
8. Select **Fund Activity Category**. This list pulls from *Administration>Lists>Fund Activity Categories*.
9. Add **Category Explanation** or description (optional).
10. Select an **Opportunity Manager**. This list pulls from *Contacts>Staff*. Opportunity Managers can edit Opportunity Details and create, edit, and delete all items related to their opportunity, including application forms, and budget and performance plan templates. Additionally, Opportunity Managers can enroll opportunities and applications in workflows and will receive automated emails when applications have been submitted to their opportunity.
11. Select a **Posted Date**. This is the date a published fund opportunity will be available to applicants.
12. Select an **Archive Date**. This is the date a published fund opportunity will no longer be available to applicants.
13. Add a **Funding Opportunity Number** (optional). This is a reference number for the opportunity assigned by your organization.
14. Add a Catalog of Federal Domestic Assistance Number, or **CFDA Number** (optional).
15. Check the **Is Published checkbox** to publish the opportunity. A published opportunity will be available to applicants between the Posted and Archive Dates. We recommend that you only publish the opportunity after all changes to the opportunity have been made.

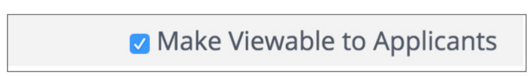


Note

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

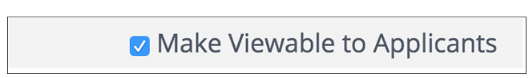
Funding Information

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

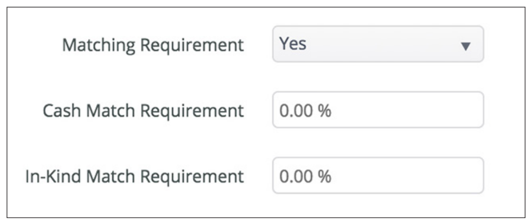


Award Information

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



18. Add **Award Ceiling** (optional). This is the maximum amount a single award recipient may receive.
19. Add **Award Floor** (optional). This is the minimum amount a single award recipient may receive.
20. Select the expected **Award Start Date** (optional).
21. Select the expected **Award End Date** (optional).
22. Add the **Expected Number of Awards** (optional).
23. Select **Matching Requirement**.
    a. If *Yes*, add **Cash Match Requirement** and **In-Kind Match Requirement** percentages (in decimal format).



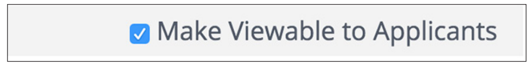
Submission Information

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

25. Select **Submission Timeline Type**.
    - **One-Time:** Applications will only be accepted for a specified timeframe
    - **Rolling:** Applications will continuously be accepted after specified date
26. Select **Submission Open Date**. This is the date and time that applications will be accepted.
27. Add **Submission Close Date** (for one-time submissions). This is the date and time that applications will no longer be accepted.
28. Select **Time Zone** for submission open and close times.
29. Add **Submission Timeline Additional Information** (optional).
30. Check the **Allow Multiple Applications checkbox** to allow an organization to submit multiple applications.

Eligibility Information

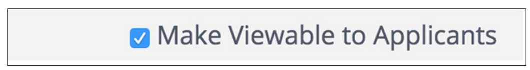
31. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.



32. Select **Eligibility Type**.
    - **Public:** Opportunity appears on funder's opportunity list in the Applicant Portal
    - **Private:** Opportunity does not appear on funder's opportunity list in the applicant portal and can only be accessed by URL link
33. Select **Eligible Applicants**. These are organization types that can apply to the opportunity.
34. Add **Additional Eligibility Information** (optional).

Additional Information

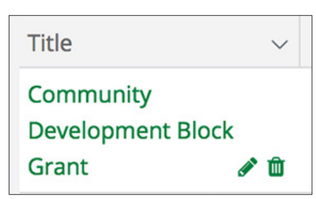
35. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.



36. Add **Additional Information URL** (optional). This is a website link that may provide more information for applicants.
37. Add **Additional Information URL Description** (optional).
38. Click **Create**. This will also create a Public Link that can be used to access the opportunity on the Applicant Portal. The link will only be active for applicants when the opportunity has been published.

How To Edit a Grant Opportunity

1. Open **Award Management>Grant Opportunities**.
2. Click the **(Edit icon)** next to a grant opportunity.



3. Update the information as necessary.
4. Click **Save**.

How To Delete a Grant Opportunity

1. Open **Award Management>Grant Opportunities**.
2. Click the **(Delete icon)** next to a grant opportunity.

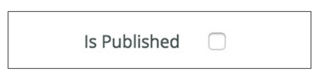
3. In the confirmation pop-up window, click **Delete**.

How To Publish a Grant Opportunity

1. Open **Award Management>Grant Opportunities**.
2. Click the **(Edit icon)** next to a grant opportunity.

Opportunity Information

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



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

Icons

- Print
- Help
- Save View
- Add
- Import
- View Award
- Edit

Fund Awards

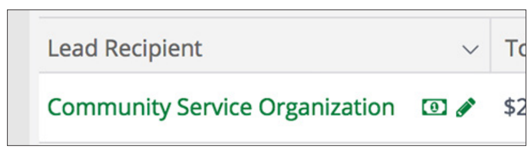
Fund awards may be created from a fund opportunity (for clients with Competitive Award Management), a fund, or as a standalone award.

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

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

How To View a Fund Award

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



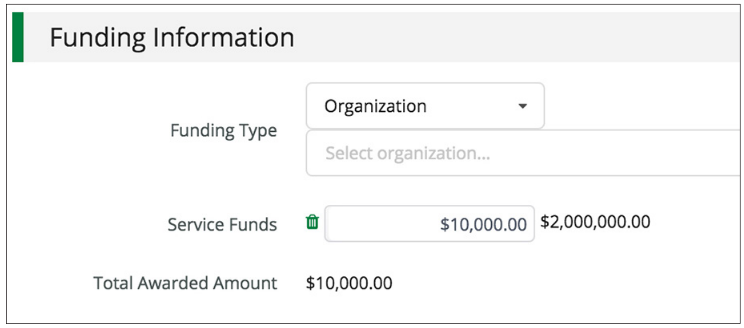
How To Add a Fund Award

1. Open **Fund Management>Awards**.
2. Click the **(Create icon)** in the *Icon Bar*.
3. In the pop-up window, select an award **Recipient**.
4. Select your organization's **Responsible Person** for the award (optional). This list pulls from *Contacts>Staff*.
5. Add an **Award Identification Number** (optional). This a reference number for an external system.
6. Add **Award Name** (optional). If no award name is provided, the name will default to "Recipient Name - Award."
7. Add **Awarded Date, Length of Award** in years and additional months, and **Start Date**.
8. Add a **Description** (optional).

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

Funding Information

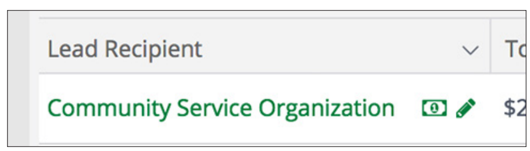
10. Select a **Funding Type** and **funding source**.



11. Add **award amount** from funding source.
12. Click **Create**.

How To Edit a Fund Award

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



3. Update the information as necessary.
4. Click **Save**.

How To Import Fund Awards

Organizational Admin and Fund Admin can import multiple awards using the [Awards Import Template](#)(recommended) or their own Excel file. The Awards Import Template includes the *Recipient**, *Responsible Person**, *Award Identification Number*, *Awarded Date**, *Length of Award Years**, *Length of Award Months**, *Start Date**, *Description*, *Unique Identifier*, *Status*, *Funding Source Type*, *Funding Source Name*, *Funding Source Amount*, and *Funding Opportunity* fields. Required fields have asterisks (*) next to their names.

1. Open **Award Management>Fund Awards**.
2. Click the **(Import icon)** in the *Icon Bar*.
3. In the pop-up window, click **Choose a file** to select a file from your

computer.

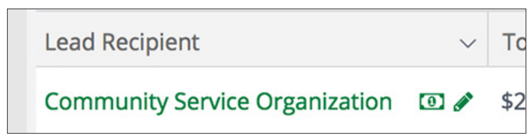
4. Select the **Destination** field for each Source column. If you are using the [Awards Import Template]() (recommended), the source and destination fields should match.
5. Click **Import**.

How To Activate a Fund Award

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

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

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



3. Update information as necessary.

Award Information

4. Select Payment Request Type.
   - **Reimbursement:** Recipient will be reimbursed for expenses
   - **Advance:** Recipient will be given payments in advance
5. Select **Budget Tracking Interval**. This is the frequency of budget reporting.
6. Select **Due Date for Budget Items**. This is the due date for budget reporting after the interval ends.
7. Select **Performance Tracking Interval**. This is the frequency of performance reporting.
8. Select **Due Date for Performance Items**. This is the due date for performance reporting after the interval ends.

Note

Risk is shown as Low, Medium, or High on the award Analytics page. If multiple areas are monitored, the highest risk will be shown.

Risk Definition

9. Check the **Monitor Reporting Risk checkbox** to show award reporting risk. Reporting risk is defined as days report is past due.
   a. If desired, update the **Low, Medium,** and **High** risk thresholds.
10. Check the **Monitor Budget Risk checkbox** to show award budget risk.

Budget risk is defined as percent variance of expenses to budget.

  a. If desired, update the **Low, Medium**, and **High** risk thresholds.

11. Check the **Monitor Performance Risk checkbox** to show award performance risk. Performance risk is defined as percentage of goals on target.
    a. If desired, update the **Low, Medium**, and **High** risk thresholds.
12. Click **Activate**.

Icons

- Print
- Help
- Save View
- Activate Award
- Resend Award Email
- Edit
- Delete

Grant Awards

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

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

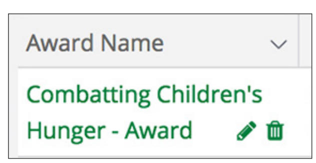
The Grant Awards list shows the *Award Name*, *Recipient*, *Funding Source*, *Total Awarded Amount*, *Start Date*, *Length of Award*, *Status*, and *Activated* columns by default. In addition, the following columns are available: *Award Identification Number, Request for Proposal ID, Funding Opportunity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

How To View a Grant Award

1. Open **Award Management>Grant Awards**.
2. Click the **award name**.

How To Edit a Grant Award

1. Open **Award Management>Grant Awards**.
2. Click the **(Edit icon)** next to an award name.

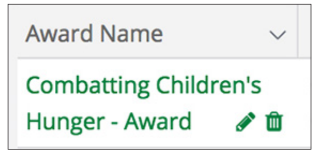


3. Update the information as necessary.
4. Click **Save**.

How To Delete a Grant Award

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

2. Click the **(Delete icon)** next to an award name.



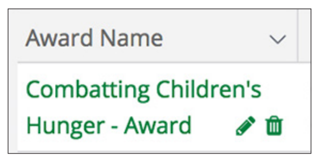
3. In the confirmation pop-up window, click **Delete**.

How To Activate a Grant Award

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

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

1. Open **Award Management>Grant Awards**.
2. Click the **(Edit icon)** next to an unactivated award name.



3. Update the information as necessary.

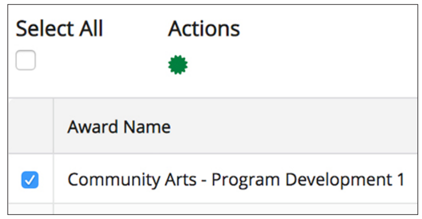
Award Information

4. Select **Budget Tracking Interval** and **Performance Tracking Interval**.
5. Click **Activate**.

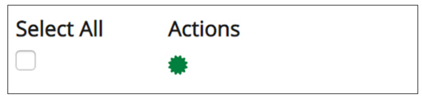
How To Activate Multiple Grant Awards

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

1. Open **Award Management>Grant Awards**.
2. Click the **(Activate Award icon)** in the *Icon Bar*.
3. Select awards or check the **Select All** checkbox.



4. Click the **(Activate Award icon)** under *Actions*.



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