AmpliFund™

Competitive Award Management User Guide

Contents

Competitive Award Management Overview

The *Competitive Award Management* upgrade module allows funders to solicit and review applications submitted to a competitive opportunity. The module allows users to create competitive opportunities, build forms, create budget and performance plan templates, access an applicant-facing portal, and access and evaluate submitted applications.

AmpliFund allows users to manage opportunities created from funds or grants.

Creating Opportunities

Competitive award opportunities can be created from a fund or a grant. These opportunities will be available for organizations to access, review, and submit applications for award consideration.

Icons

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

Creating Opportunities

Opportunity records include details about the application, customizable forms, and templates for applicants to submit proposed budgets and performance plans.

The Fund Opportunities and Grant Opportunity lists 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.

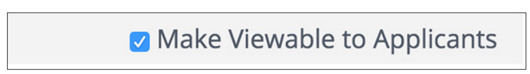
How To Create a Fund Opportunity

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

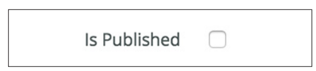
3. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.



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.

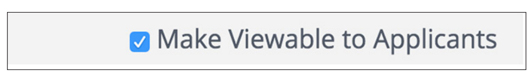


Note

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

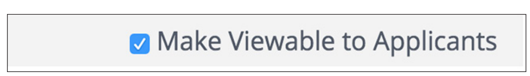
Funding Information

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



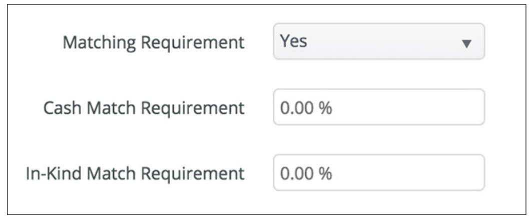
Award Information

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



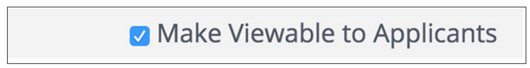
16. Add **Award Ceiling** (optional). This is the maximum amount a single award recipient may receive.
17. Add **Award Floor** (optional). This is the minimum amount a single award recipient may receive.
18. Select the expected **Award Start Date** (optional).
19. Select the expected **Award End Date** (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

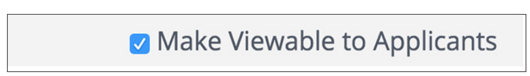
22. Uncheck the **Make Viewable to Applicants checkbox** to hide all information in the section to applicants.



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.

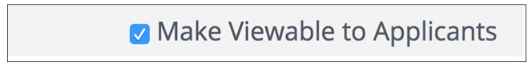


30. Select **Eligibility Type**.
    - **Public:** Opportunity appears on funder's opportunity list in the Applicant Portal
    - **Private:** Opportunity does not appear on funder's opportunity list in the applicant portal and can only be accessed by URL link

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.

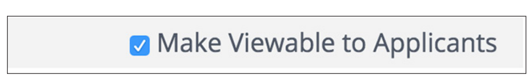
How To Create a Grant Opportunity

A grant opportunity is a competitive sub-award opportunity with program funding from exclusively the parent 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*.

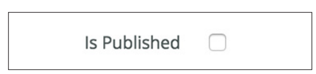
Opportunity Information

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.

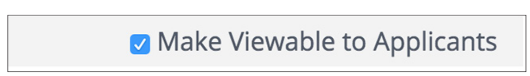


Note

The *Total Program Funding* amount is the grant's *Total Awarded Amount.*

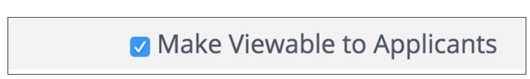
Funding Information

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



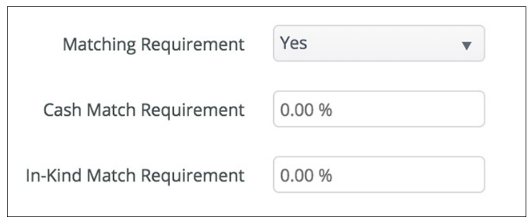
Award Information

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



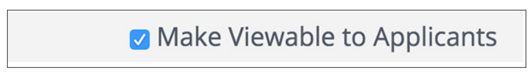
18. Add **Award Ceiling** (optional). This is the maximum amount a single award recipient may receive.

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

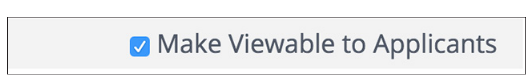
24. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.



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

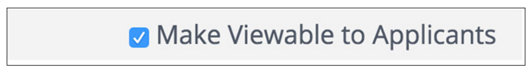
31. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.



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 an Opportunity

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click the **(Edit icon)** next to an opportunity name.

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

How To Delete an Opportunity

Prerequisite: No applications can be started or submitted

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click the **(Delete icon)** next to an opportunity name.

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

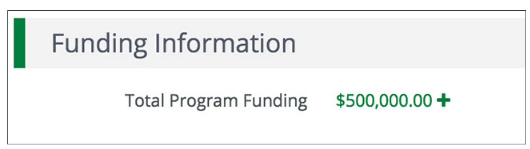
How To Add Program Funding to a Fund Opportunity

Program funding can be added after a fund opportunity has been created. Program funding for grant opportunities cannot be edited.

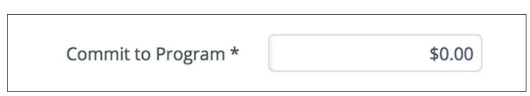
1. Open **Award Management>Fund Opportunities**.
2. Click a **fund opportunity**.

Funding Information

3. Click the **+ (Add icon)** next to the *Total Program Funding* amount.



4. In the pop-up window, select **Funding Type**.
5. Select funding source **Name**.
6. Add amount that will be **Committed to Program**. This will update the *Total Program Funding* amount displayed.



7. Click **Add**.

--OR--

1. Open **Award Management>Fund Opportunities**.
2. Click a **fund opportunity**.
3. Open the **Configuration tab>Program Funding**.

4. Click the ✚ **(Add icon)** in the *Icon Bar*.
5. In the pop-up window, select **Funding Type**.
6. Select funding source **Name**.
7. Add amount that will be **Committed to Program**. This will update the *Total Program Funding* amount displayed.

8. Click **Add**.

Applicant Portal

As a funder, you can configure many aspects of how your opportunity appears on the Applicant Portal for applicant organizations, including opportunity information, custom application forms, budget and performance plan templates, and required sections. Funders can also add their logo to the Applicant Portal and additional help information and links.

Icons

Print

Help

Edit

Setting Up the Applicant Portal

Opportunities will be available for applicants on the Applicant Portal.

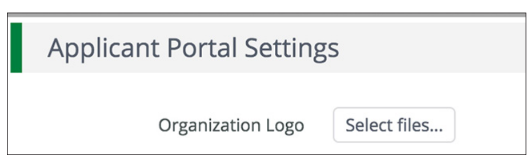
How To Add Your Organization's Logo to the Applicant Portal

Your organization's logo will appear on every page of your Applicant Portal, except for the general Applications Listing page which includes all available opportunities from all funding organizations. If no logo is provided, the AmpliFund logo will appear by default.

1. Open **Administration>License Information.**
2. Open the **Settings tab**.
3. Click the **(Edit icon)** in the *Icon Bar*.

Applicant Portal Settings

4. Click **Select Files...** to select a file from your computer. AmpliFund supports JPG and PNG image files.



5. Click **Update**.

How To Add Help Information to the Applicant Portal

You can optionally add help and technical help information for your applicants on each opportunity. This information will appear when applicants click *Help* within an opportunity.

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click a **fund opportunity**.
3. Open the **Configuration tab>Application Settings.**

Applicant Portal Settings

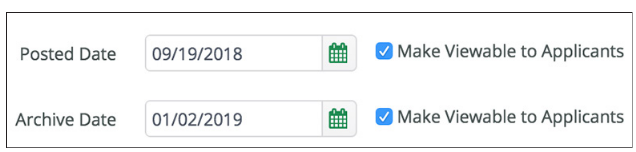
4. Add general **Help Description** or information.
5. Add **Help Email, Name**, and **Phone Number**.
6. Add **Technical Help Description** or information.
7. Add **Technical Help Email, Name**, and **Phone Number**.
8. Click **Update**.

How To Hide Opportunity Information from Applicants

Opportunity information can be shown or hidden from applicants. Section information is shown to applicants by default.

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click the **(Edit icon)** next to an opportunity name.
3. Uncheck the **Make Viewable to Applicants checkbox** in a section.

4. Uncheck the **Make Viewable to Applicants checkbox** next to a field.



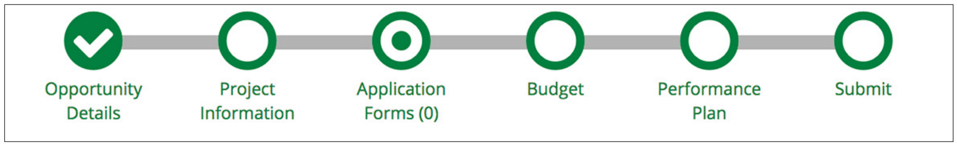
5. Click **Save**.

Icons

- Print
- Help
- Create
- Copy
- Edit
- Delete
- Move Up
- Move Down

Application Forms

Application forms are customized forms that capture applicant information and responses. Once applicants submit applications, reviewers may score applications based on form responses.



How To Add an Application Form

One or more application forms may be created for each funding opportunity. Forms may also be copied from pre-existing funding opportunities.

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **opportunity name**.
3. Open the **Configuration tab>Application Forms**.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. Add a **Form Name**.
6. Add sections and fields to the form. For more information, see Form Builder Features.
7. Click **Save**.

Form Builder Features

Form Builder Icons

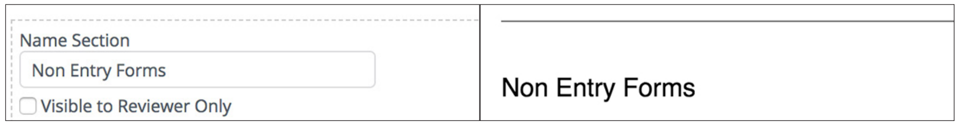
All sections and fields can be edited, deleted, or moved up or down using the icons.

Template Section

The Template Section includes commonly used form sections that can be quickly added to any application form for your convenience. This templates are provided by default and cannot be added to or edited.

Section

Sections group fields together (although not fields are not required to be within a section). Entire sections can be hidden from the applicant and only made visible to the reviewer.



Field

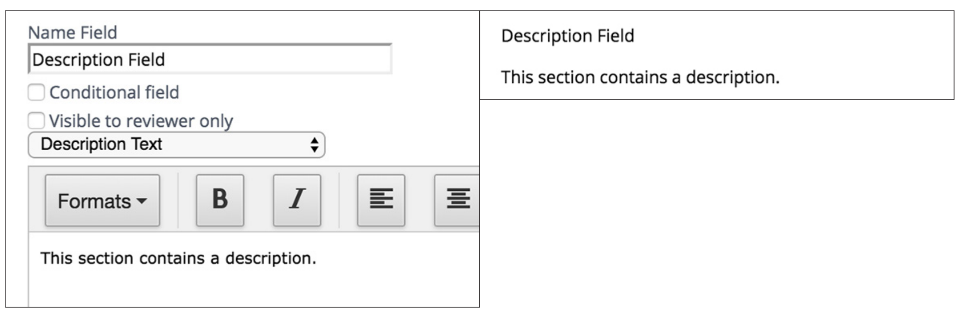
Fields can be content or entry types. Content fields provide content only and do not request a response. Entry fields request or require a response. Additionally, fields be marked for reviewer scoring, be made conditional (only appearing for specific responses), or can be hidden from the applicant and only made visible to the reviewer.

Text Label

Text Label fields are short texts that appear as the *Name Field* content. They do not request a response.

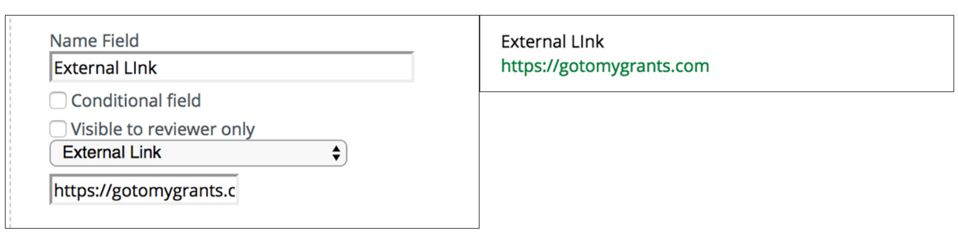
Description Text

Description Text fields are long texts that appear as a field name and paragraph(s). They do not request a response and cannot be scored.



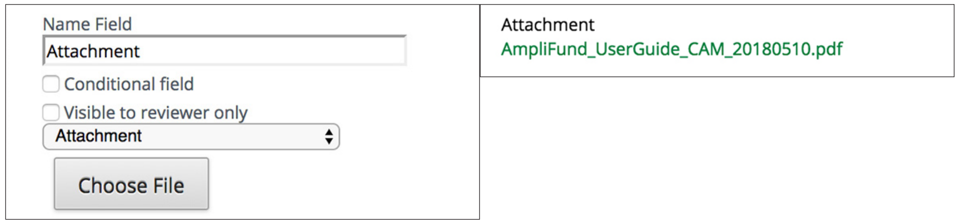
External Link

External Link fields appear as URL links. They do not request a response and cannot be scored.



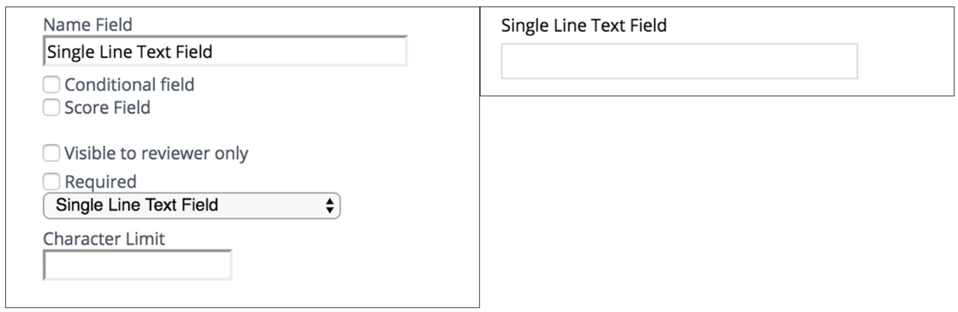
Attachment

Attachment fields appear as links to downloadable files. They do not request a response and cannot be scored.



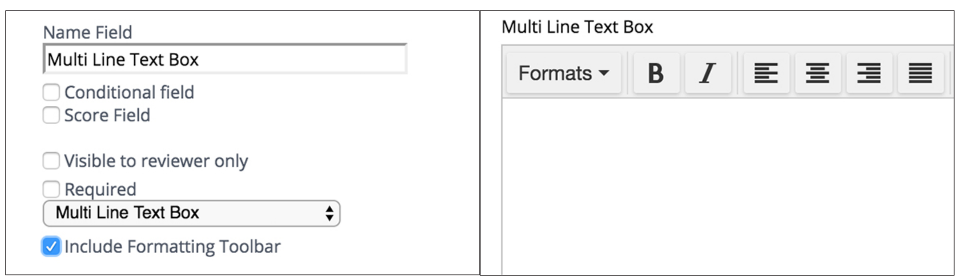
Single Line Text Field

Single Line Text fields request or require short answer responses.



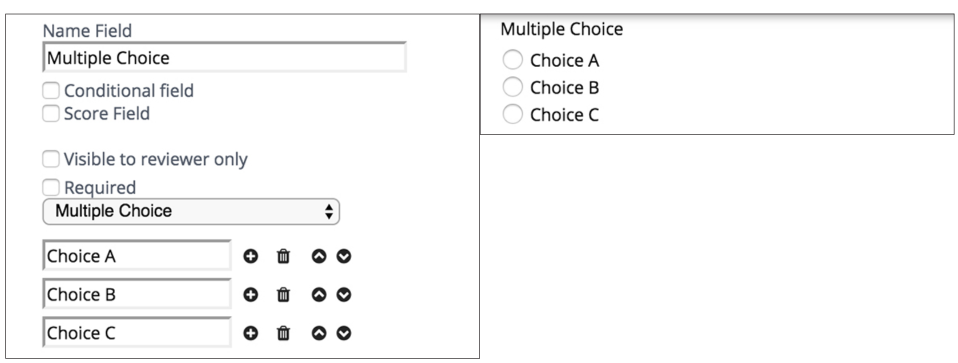
Multi Line Text Box

Multi Line Text Box fields request or require long answer responses. A formatting toolbar can be added to the field and a character limit for responses can be enforced.



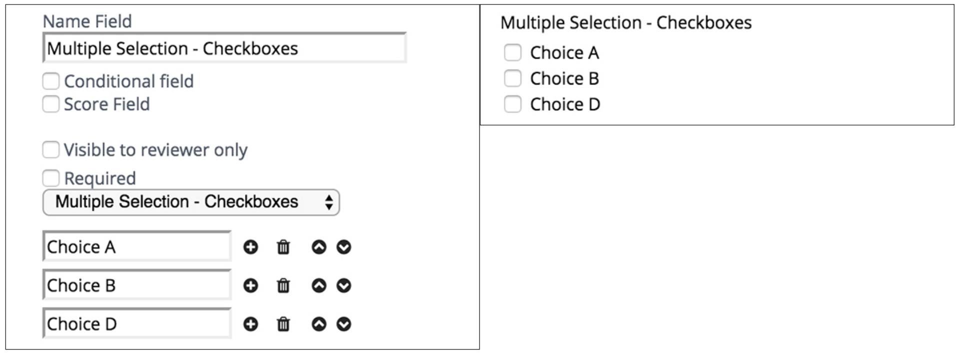
Multiple Choice

Multiple Choice fields request or require a single selection from multiple options.



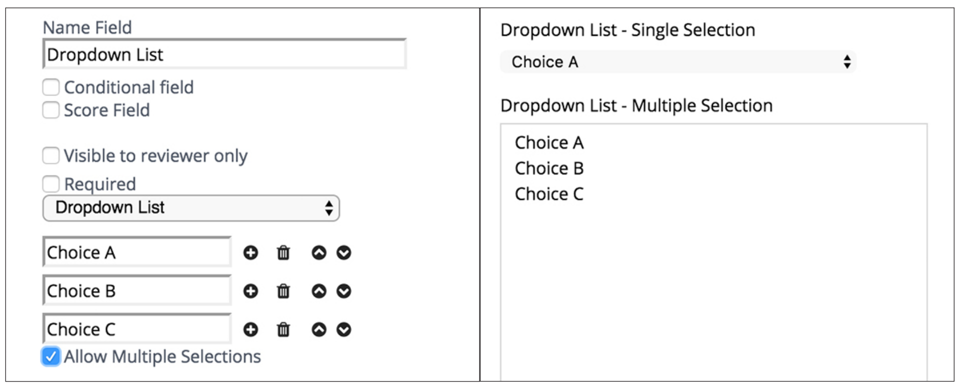
Multiple Selection - Checkboxes

Multiple Selection - Checkboxes fields request or require selection(s) from multiple options.



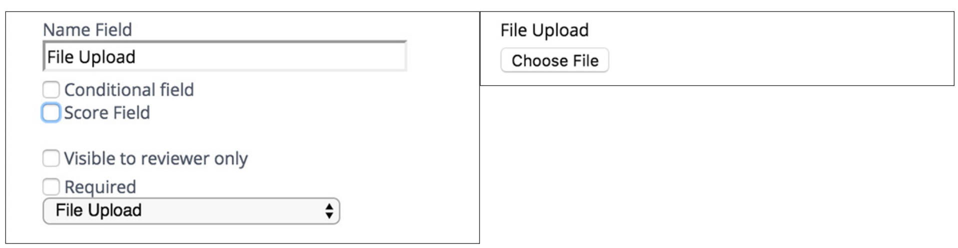
Dropdown List

Dropdown List fields request or require a single selection from multiple options by default, but multiple selections can be allowed.



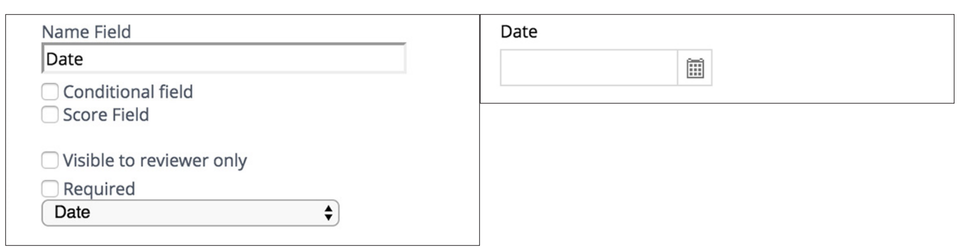
File Upload

File Upload fields request or require a file to be uploaded.



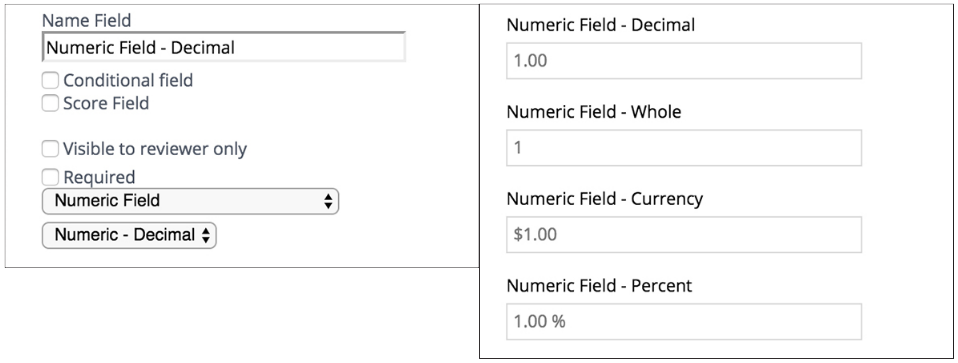
Date

Date fields request or require a date to be selected.



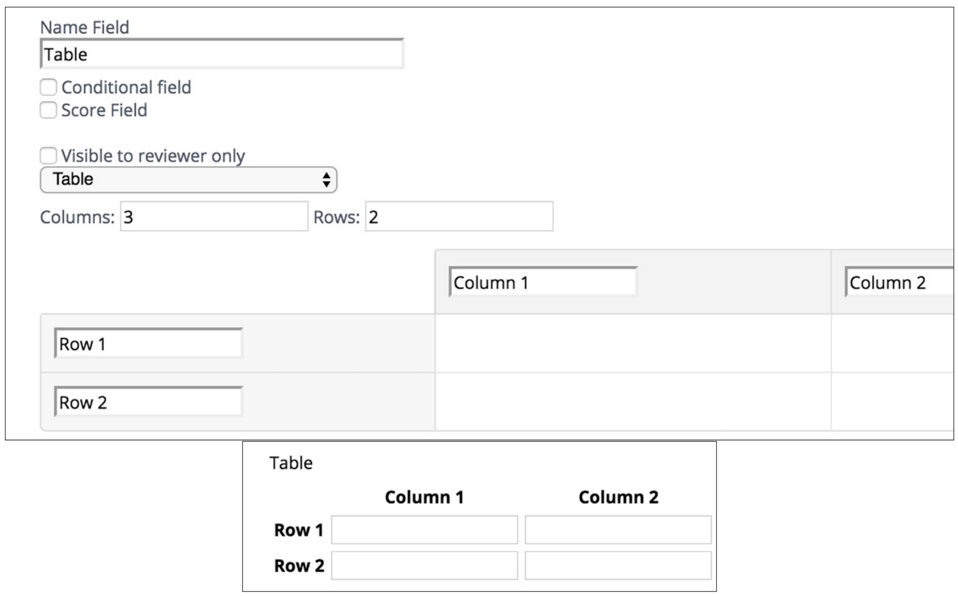
Numeric Field

Numeric Fields request or require a numeric entry. These can be decimal, whole numbers, currency, or percent entires.



Table

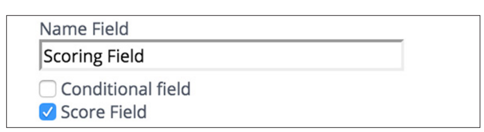
Table fields request data entered in a table. The number of rows and columns for the table can be configured, and column and row labels can be added.



How To Add Scoring Parameters to a Field

Scoring categories and scale (i.e., a scale of 0-10) can be set on each field. Default score scale can be set for the opportunity from *Configuration tab>Application Settings*, but can be overridden on each field. For more information, see Scoring and Review Settings.

1. On the Form Builder, check the **Score Field checkbox** below the *Name Field*.



2. Select **Field Scoring Category**. This list pulls from the *Configuration tab>Application Settings*.

3. Set **Field Score Scale**. This defaults to scale set in *Configuration tab>Application Settings*.

How To Make a Field Required

Prerequisite: Must be an entry field type.

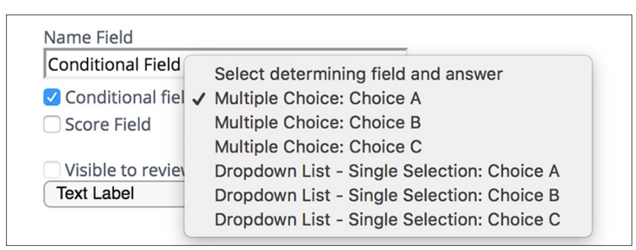
The field will be required for applicants only.

1. On the Form Builder, select an **entry field type.**
2. Check the **Required checkbox**.

How To Add a Conditional Field

Prerequisite: A parent or determining field must be created. The parent field must have a single selection for response: Multiple Choice or Dropdown List (without allowing multiple selections).

1. On the Form Builder, check the **Conditional Field checkbox** below *Name Field*.
2. Select **Determining Field and Answer**. When this answer is selected, the conditional field will be visible to the applicant.



How To Hide a Field or Section from Applicants

Any field or section can be hidden from applicants and be shown to reviewer users only. If a section is hidden, all fields within the section will also be hidden.

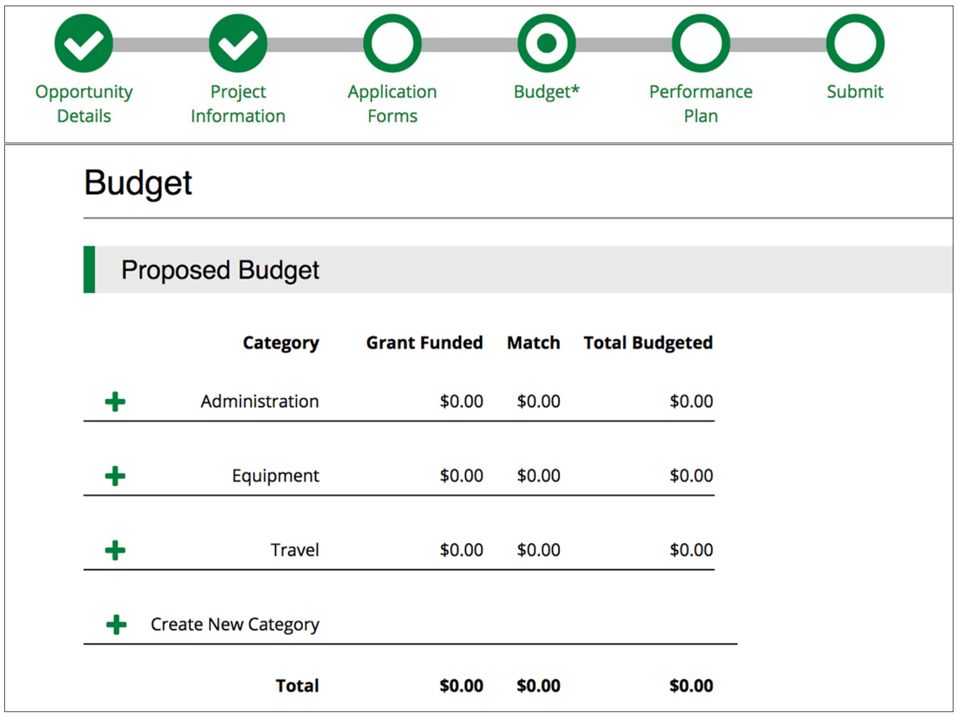
1. On the Form Builder, check the **Visible to reviewer only checkbox** below *Name Section* or *Name Field*. The reviewer-only fields and sections will have a gray background when previewing the form application. You can also preview the applicant and reviewer views using the buttons below the *Icon Bar.*

Icons

- Print
- Help
- Create
- Edit
- Delete

Budget Template

Budget Templates allow you to provide applicants with budget categories, if desired. These categories link back to your organization's budget categories. Based on the application settings, applicants can or must use the provided template, they may create their own budget, or they do not have to provide a budget.



	Category	Grant Funded	Match	Total Budgeted
+	Administration	$0.00	$0.00	$0.00
+	Equipment	$0.00	$0.00	$0.00
+	Travel	$0.00	$0.00	$0.00
+	Create New Category			
	Total	**$0.00**	**$0.00**	**$0.00**

How To Configure Budget Template Settings

The Budget portion of the application can be available, required, or hidden. Applicants may be allowed to create their own budget categories in addition to using budget categories provided in the template.

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **opportunity name**.
3. Open the **Configuration tab>Application Settings**.

Application Configuration

4. Select the **Applicant Budget Template Required** settings.
    - **No:** The Budget section of the application is available but not required

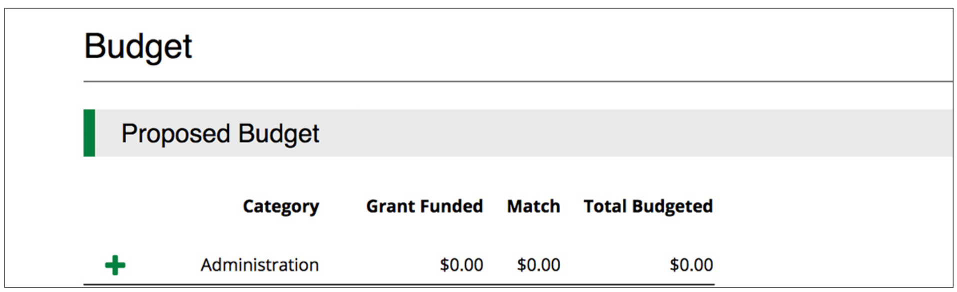
for submission.

- **No and Hide Tab:** The Budget section of the application is not available.
- **Yes:** The Budget section of the application is required for submission.

5. Select if **Budget Categories Created By Applicant Allowed**. This will allow applicants to create their own budget categories.
6. Click **Update**.

How To Add a Budget Category to the Budget Template

Budget categories are selected from your organization's budget categories. These categories can be used by applicants to build their proposed budget.



1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **opportunity name**.
3. Open the **Configuration tab>Budget Template**.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. Select a **Category**. This pulls from *Administration>Lists>Budget Categories*.
6. Add a **Description** (optional).
7. Click **Create**.

Icons

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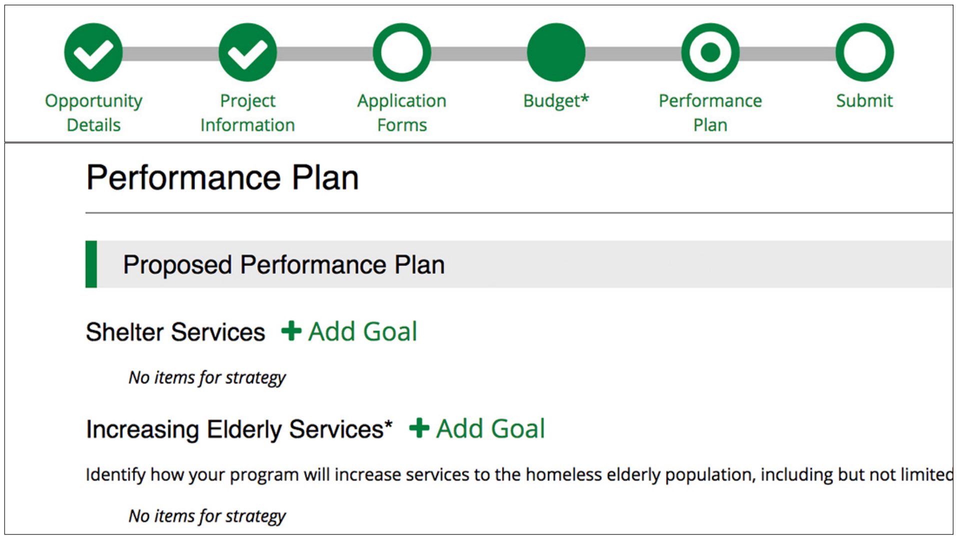
Performance Plan Template

Performance Plan Templates allow you to provide applicants with performance strategies and available performance goal types, if desired. Based on the application settings, applicants can or must use the provided template, or they do not have to provide a performance plan.



How To Configure Performance Template Settings

The Performance Plan portion of the application can be available, required, or hidden.

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **opportunity name**.
3. Open the **Configuration tab>Application Settings**.

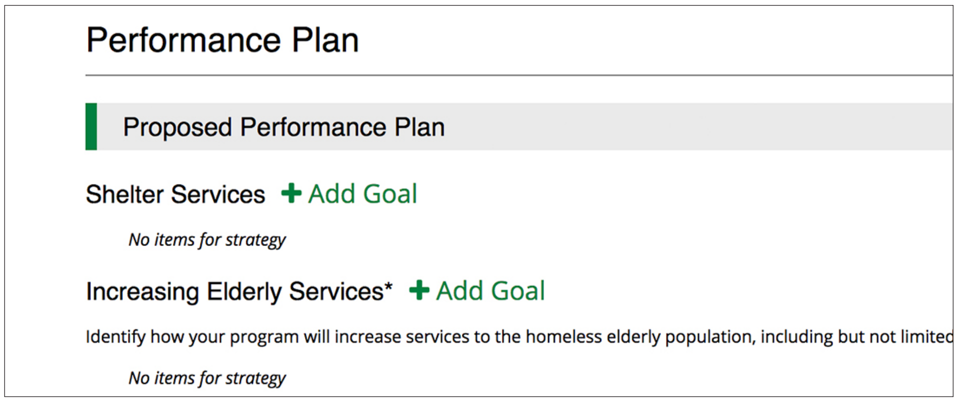
Application Configuration

4. Select the **Performance Plan Template Required** settings.
   - **No:** The Performance Plan section of the application is available but not required for submission.
   - **No and Hide Tab:** The Performance Plan section of the application is not available.
   - **Yes:** The Performance Plan section of the application is required for

submission.

5. Click **Update**.

How To Add a Strategy to the Performance Plan Template



1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **opportunity name**.
3. Open the **Configuration tab>Performance Plan Template**.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. Add a strategy **Title**.
6. Add a **Description** (optional).
7. Select if adding goals to the strategy is **Required**.
8. Select **Available Goal Types**. See Goal Types for more information.
9. Click **Create**.

Scoring and Review Settings

Scoring parameters and review workflows should be set up before the opportunity is published. Reviewers can view and download applications, including any reviewer-only fields and all application materials; score fields; and provide comments. For information about the application reviewer's role and tasks, see the Application Reviewer Guide.

Icons

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Application Scores

Score settings include score scale, scoring categories, score outlier and score visibility settings.

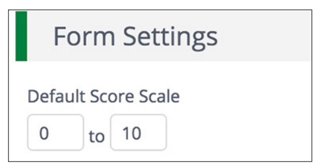
How To Set Default Score Scale

Score scale can be set as a default for the application and can be set individually on each application form field. The default score scale will auto-populate each field score scale.

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **opportunity name**.
3. Open the **Configuration tab>Application Settings**.

Form Settings

4. Set minimum and maximum scores for **Default Score Scale** (i.e. scale from 0-10).



5. Click **Update**.

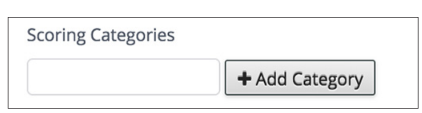
How To Add a Scoring Category

Scoring categories allow you to group multiple field response scores into an overarching category. Category scores can be viewed in total and by average. Scoring categories can be selected on each application form field.

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **opportunity name**.
3. Open the **Configuration tab>Application Settings**.

Form Settings

4. Add a **Scoring Category** name.



5. Click **+ Add Category**. The category will appear in the box below.
6. Click **Update**.

How To Delete a Scoring Category

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **opportunity name**.
3. Open the **Configuration tab>Application Settings**.

Form Settings

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

6. In the confirmation pop-up window, click **Delete**. If the category has been applied to any application form fields, they will automatically be reassigned to the Default category.
7. Click **Update**.

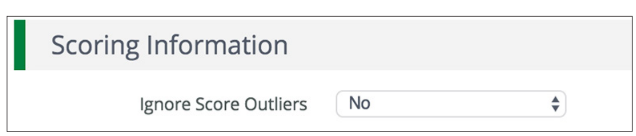
How To Ignore Score Outliers

For application evaluations that include multiple scorers, outliers may be ignored from the score totals and averages. This will exclude the highest and the lowest score from each application's calculated averages.

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **opportunity name**.
3. Open the **Configuration tab>Application Settings**.

Scoring Information

4. Select to **Ignore Score Outliers**.



5. Click **Update**.

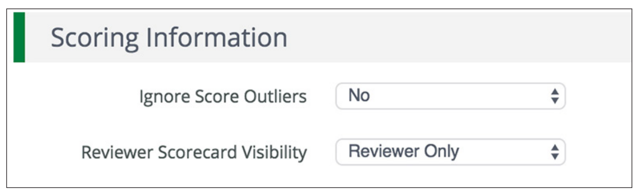
How To Set Scorecard Visibility

Once an application has been scored, a system-generated scorecard populates with the scoring averages, scores by category, and more. The scorecard may show each scorer only their scores or everyone's scores.

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **opportunity name**.
3. Open the **Configuration tab>Application Settings**.

Scoring Information

4. Select **Reviewer Scorecard Visibility**.
    - **All Reviewers:** Show each reviewer all scores
    - **Reviewer Only:** Show each reviewer only their own scores



5. Click **Update**.

Icons

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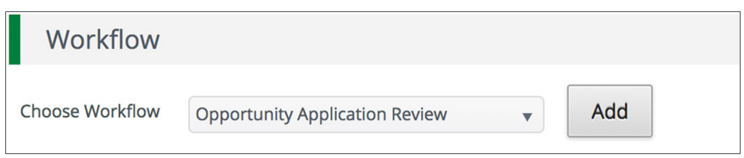
Workflow Settings

One or more defined workflows can be assigned to an opportunity. Workflows can help facilitate the application evaluation, scoring, and awarding process in AmpliFund. To learn more about workflow, see the AmpliFund Workflow Guide.

How To Add a Workflow to an Opportunity

Any Opportunity Application workflow type can be assigned to an opportunity.

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **opportunity name**.
3. Open the **Configuration tab>Workflow Settings**.
4. Select a **workflow** from the *Choose Workflow* dropdown. This list pulls from *Administration>System Administration>Workflow* (Opportunity Application workflow type only).



5. Click **Add**.

How To Edit an Assigned Workflow

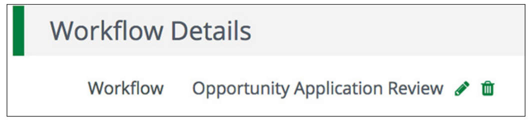
After a workflow has been assigned to an opportunity, that workflow may be updated through the opportunity or through the Administration module by Organization Administrators.

Prerequisite: Opportunities cannot be currently enrolled in workflow.

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **opportunity name**.
3. Open the **Configuration tab>Workflow Settings**.

Workflow Details

4. Click the (**Edit icon)** next to a workflow.



5. Click the **(Edit icon)** in the *Icon Bar*.
6. Update the information as necessary.
7. Click **Update**.

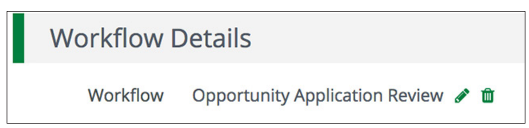
How To Remove a Workflow from an Opportunity

Prerequisite: Workflows cannot be previously or currently used on the opportunity.

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **opportunity name**.
3. Open the **Configuration tab>Workflow Settings**.

Workflow Details

4. Click the **(Delete icon)** next to a workflow.



How To Assign Users to Workflow Actions

Once a workflow has been assigned to an opportunity, users can be assigned workflow actions. This allows you to assign users actions for the specific opportunity, such as assigning reviewers to each workflow so that a subset of reviewers can score or review selected applications.

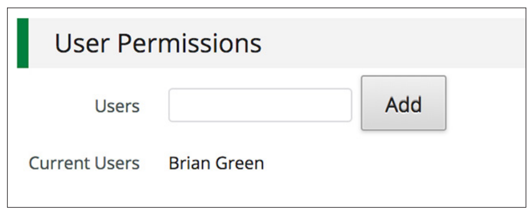
1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **opportunity name**.
3. Open the **Configuration tab>Workflow Settings**.

Workflow Details

4. Click the **> (arrow icon)** next to a workflow queue to show queue actions.

5. Click an **action name**.

6. In the pop-up window, select a **User**. This list pulls from *Administration>System Security>Users*.



7. Click **Add**.

Testing and Publishing Opportunities

Before you publish and share an opportunity, your organization's users can view and test the entire application process. We also recommend you use our Opportunity Publication Checklist before publishing. Once published, the opportunity can be made available to applicants.

Icons

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Testing Opportunities

Before publishing, your organization's users can preview and test the application process, including viewing and submitting applications in the Applicant Portal, enrolling and assigning workflows, reviewing and scoring applications, and selecting recipients and creating awards from the opportunity.

For more information on submitting applications, see the AmpliFund Competitive Award Management Public Applicant Portal Guide. For more information on reviewing and scoring applications, see the AmpliFund Application Reviewer Guide. For more information on workflow enrollment, see the AmpliFund Workflow User Guide.

How To Test an Opportunity

Prerequisite: Submission close date and archive date cannot have passed.

Once test applications have been submitted, you can also test enrolling in workflows, reviewing and scoring, and creating awards.

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **unpublished opportunity name**.

Opportunity Information

3. Click the **Public Link**. This will take you to a preview of your application. From this preview, you can submit test applications. See the AmpliFund Competitive Award Management Public Applicant Portal Guide for more information on applying to opportunities.

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

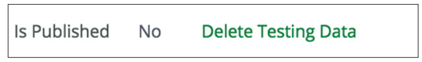
How To Delete Test Data

Test data, including test applications, scores, and awards, can be deleted prior to publishing the opportunity.

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **unpublished opportunity name.**

Opportunity Information

3. Click **Delete Testing Data** next to *Is Published*.



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

Icons

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Publishing Opportunities

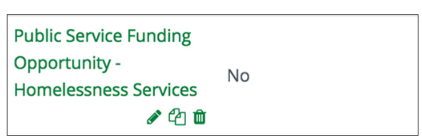
Once published, the opportunity will be visible on the Applicant Portal between the opportunity's Posted Date and Archive Date. The application forms, budget templates, and performance plan templates cannot be edited while the opportunity is published.

Before you publish, we recommend that you complete the following items (also available as a printable Opportunity Publication Checklist in the Appendix).

- Review all information on Opportunity Details
- Review application forms, budget template and performance template content
- Review visibility for opportunity details, budget template, performance template, and application forms. (Budget template and performance template visibility can be set on *Configuration tab>Application Settings*)
- Review application forms as an applicant and as a reviewer
- Review scoring scales for all application form fields
- Review workflow set up, enrollment, and user assignments
- Test the opportunity
- Delete any test data
- Publish opportunity (on *Details tab*)

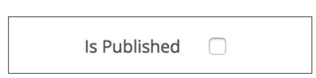
How To Publish an Opportunity

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click the **(Edit icon)** next to an unpublished opportunity name.



Opportunity Information

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



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

Warning
Unpublishing will delete any applications that have been started or submitted.

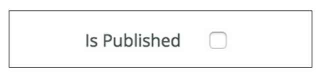
How To Unpublish an Opportunity

Unpublishing an opportunity will remove it from the Applicant Portal. You should only unpublish an opportunity if applicants have not started or submitted applications, or if there is misinformation on the Fund Opportunities Details page that must be removed or changed before applications may be submitted.

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

Opportunity Information

3. Uncheck the **Is Published checkbox**.



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

How To Delete an Opportunity

Prerequisite: Applications cannot be started or submitted.

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click the **(Delete icon)** next to an opportunity name.

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

Icons

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Sharing Opportunities

Once published, the opportunity's public link will be available to applicants. If the opportunity is public, the opportunity will also be listed with all your organization's available public opportunities. You can also allow your organization's staff to apply to the opportunity.

Public Link

The public link is only active for applicants once the opportunity has been published. For a private opportunity, we recommend that you send email the link directly to applicants. For public opportunities open to any applicant, the link may be posted on a website for easy access.

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

How To Share All of Your Available Opportunities

In addition to the opportunity-specific public link, you can share a link to a list of all your available opportunities.

1. Open **Administration >License Information**.

Product And Licensing Information

2. Copy the **Public Link**.

Public Link https://gotomygrants.com/Public/opportunities/amplifund-training-grantor

How To Allow Internal Applicants

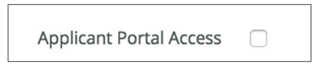
If your opportunity permits, your organizations internal staff can apply to the opportunity. Once an application has been started, staff can access their applications from *AmpliFund>User Navigation Menu>Applicant Portal*. The User Navigation Menu can be accessed by clicking the user’s name in the top-right corner of AmpliFund.

1. Open **Administration>System Security>Users**.
2. Click the **(Edit icon)** next to a user name.

Display Name
No Name

User Information

3. Check the **Applicant Portal Access checkbox**.



4. Click **Update**.

Receiving Applications

As applicants submit their applications, the applications can be viewed and downloaded, enrolled in workflows, reviewed and scored, and awards can be created.

Icons

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Reviewing Applications

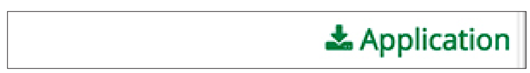
As applicants submit their applications, they will appear in the *Applications tab* in an opportunity. When a new application is received, the Opportunity Manager will receive an email notification from no-reply@gotomygrants.com. After an application has been submitted by an applicant, it may be enrolled in a workflow.

Users assigned the Review Application workflow action can review submitted applications enrolled in the Opportunity Application Review workflow instance.

How To Download an Application

Users can download an application and its materials using the **Application** link at any time.

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **opportunity name**.
3. Open the **Applications tab**.
4. Click an **application name**.
5. Click the **Application** link below the *Icon Bar*.



How To View an Application

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **opportunity name**.
3. Open the **Applications tab**.
4. Click an **application name**.

Note
The application's context-specific tabs are different than the opportunity's tabs.

How To View Application Materials

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **opportunity name**.
3. Open the **Applications tab**.

4. Click an **application name**.
5. Open the **Application Materials tab>Project Information** to view basic information such as application name and total amount of award requested.
6. Open the **Application Materials tab>Application Forms** and click a **form name** to view applicant responses.

7. Open the **Application Materials tab>Budget** to view applicant proposed budget. You can toggle between a detailed and quick view.

8. Open the **Application Materials tab>Performance Plan** to view applicant proposed performance plan.

Note

Applicants will receive email notifications whenever there is a status change to their application, including workflow queue status changes. Emails are sent from no-reply@gotomygrants.com.

How To Enroll Applications Into Review Workflows

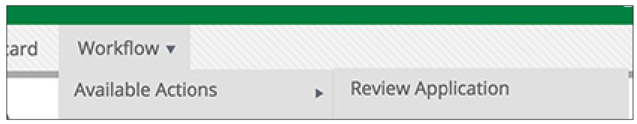
Workflows can help facilitate the application evaluation, scoring, and awarding process in AmpliFund. To learn more about workflow, see the AmpliFund Workflow Guide.

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **opportunity name**.
3. Open the **Applications tab**.
4. Click an **application name**.
5. Open **Workflow tab>Add to Workflow>workflow instance**.
6. In the confirmation pop-up window, click **Confirm**.

How To Review an Application

Prerequisite: Application must be enrolled in the Opportunity Application Review workflow instance.

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **opportunity name**.
3. Open the **Applications tab**.
4. Click an **application name**.
5. Open the **Workflow tab>Available Actions>Review Application**.



6. In the pop-up window, select if the applications passes your review in the *Pass Review* dropdown.

7. Add **Comments** (optional). These comments will be visible to users in your organization.
8. Add **Internal Comments** (optional). These comments will only be visible to you.
9. Click **Create**.

Icons

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Scoring Applications

Users assigned the Score Application workflow action can review submitted applications enrolled in the Opportunity Application Review workflow. Users can submit their scores and comments for each section of the application.

How To Score an Application

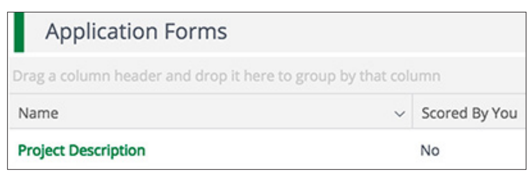
Prerequisite: Application must be enrolled in the Opportunity Application Review workflow instance and the Scoring workflow queue.

The Score Application workflow action allows users to score and comment on application materials.

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **opportunity name**.
3. Open the **Applications tab**.
4. Click an **application name**.
5. Open the **Workflow tab>Available Actions>Score Application**.

Application Forms

6. In the *Application Forms* section, click a **form name**.



7. In the *Score* dropdown next to each field, select your **score**.

8. Add information in reviewer fields and upload reviewer files as necessary.
9. In the *Final Comments* section, add **Final Comments** (optional).
10. Click **Save** to save your progress or **Submit** to submit your score.
11. In the confirmation pop-up window, click **Yes**.

Budget

12. In the *Total Proposed Budget by Category* section, click **Comment** to add comments.
13. In the *Final Comments* section, add **Final Comments**.
14. Click **Submit Comments**.

Performance Plan

15. In the *Proposed Performance Plan* section, click **Comment** to add comments.
16. In the *Final Comments* section, add **Final Comments**.
17. Click **Submit Comments**.

Note

Once you submit your scores and comments for each section of an application, your review is complete.

Icons

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Reviewing Scores

Once the fund opportunity's applications have been reviewed, you can view your scores and all scores for the applications. From the *Opportunity Review tab*, you can also access application details and the applicant's primary contact information.

How To View All Application Scores

The average scores for all applications are listed on the *Applications tab*.

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **opportunity name**.
3. Open the **Applications tab**.

How To View Application Scorecard

Once the application has been reviewed, application category scores and scoring comments can be viewed on a system-generated scorecard. Depending on the application settings, this card may show all reviewers' or the individual reviewer's scores.

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **opportunity name**.
3. Open the **Applications tab**.
4. Click **application name.**
5. Open the **Scorecard tab**.
6. Click **My Reviews** in the top-right of the page to view your reviews or click **All Reviews** to see all (if application settings allow).

Icons

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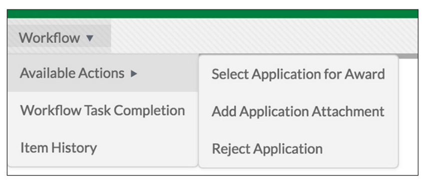
Awarding from Opportunities

Grant or fund awards can be created from opportunities.

How To Create a Fund Award from an Opportunity

Prerequisite: The application must be in the Final Review workflow.

1. Open **Award Management>Fund Opportunities**.
2. Click an **opportunity name**.
3. Open the **Opportunity Review tab**.
4. Click an **application name**.
5. Open the **Workflow tab>Available Actions>Select Applicant for Award**.



Award Information

6. In the pop-up window, select your organization's **Responsible Person** for the award. This list pulls from *Contacts>Staff*.
7. Add an **Award Identification Number** (optional).
8. Add an **Award Name** (optional)
9. Select the **Awarded Date**. This is the date the award will be given to the recipient.
10. Add the **Length of Award** in full years and any additional months.
11. Select the award **Start Date**. The End Date will populate automatically based on the award Start Date and Length of Award.
12. Add an award **Description** and **Unique Identifier** (optional).
13. Select the record *Status* as **Enabled**. This will create an enabled Fund Award record in your AmpliFund account.

Funding Information

14. Add **amounts** from each a funding source. These will add to the *Total*

Awarded Amount.

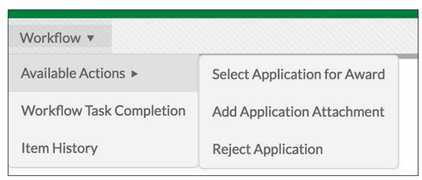
Workflow

15. Add **Comments** (optional). These comments will not be shared with applicants.
16. Click **Create**.

How To Create a Grant Award from an Opportunity

Prerequisite: The application must be in the Final Review workflow.

1. Open **Award Management>Fund Opportunities**.
2. Click an **opportunity name**.
3. Open the **Opportunity Review tab**.
4. Click an **application name**.
5. Open the **Workflow tab>Available Actions>Select Applicant for Award**.



Award Information

6. In the pop-up window, select your organization's **Responsible Person** for the award. This list pulls from *Contacts>Staff*.
7. Add an **Award Identification Number** (optional).
8. Select the **Awarded Date**. This is the date the award will be given to the recipient.
9. Add the **Length of Award** in full 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 the record *Status* as **Enabled**. This will create an enabled Fund Award record in your AmpliFund account.

Funding Information

13. Add **amounts** from each a funding source. These will add to the *Total Awarded Amount.*

Workflow

14. Add **Comments** (optional). These comments will not be shared with applicants.
15. Click **Create**.

Appendix

Goal Types

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

Milestone

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

Narrative

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

Numeric

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

Percent Achieved

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

Percent Change

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

Reimbursement

Reimbursement goals are goals with a discrete unit to achieve, and a dollar rate associated per unit. When tracking progress against a reimbursement goal, staff may enter Units Achieved. An optional checkbox field appears on each reimbursement goal type labeled "Add as budget item." If the goal is added as a budget item, the reimbursement goal will appear as part of the grant's expense budget. If a reimbursement goal is shown on the grant budget, any updates made to the goal through the performance plan will automatically update the budget. An example of a Reimbursement goal is "Number of Patient Screenings" with target/maximum units of 100, and a reimbursement rate per unit of $22. Reimbursement goals are used to support pay for performance grants.

Opportunity Publication Checklist

Once published, the opportunity will be visible on the Applicant Portal between the opportunity's Posted Date and Archive Date. The application forms, budget templates, and performance plan templates cannot be edited while the opportunity is published.

Before you publish, we recommend that you complete the following items:

- [ ] Review all information on Opportunity Details
- [ ] Review application forms, budget template and performance template content
- [ ] Review visibility for opportunity details, budget template, performance template, and application forms. (Budget template and performance template visibility can be set on *Configuration tab>Application Settings*)
- [ ] Review application forms as an applicant and as a reviewer
- [ ] Review scoring scales for all application form fields
- [ ] Review workflow set up, enrollment, and user assignments
- [ ] Test the opportunity
- [ ] Delete any test data
- [ ] Publish opportunity (on *Details tab*)