

AmpliFund Calculations Guide

This guide details how various values and dates are generated in AmpliFund.

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Activity

Field/Date	Calculation/Source	Additional Information
Events		
Event Dates	Grant Details	Event dates, such as Letter of Intent Due Date, Proposal Open Date, Proposal Close Date, Projected Receipt Date, and Close Out Date, are automatically generated from the dates listed in grant details.
Expenses		
Cash Match	= Percentage Cash Match x Direct Cost	
In Kind	= Percentage In-Kind Match x Direct Cost	
Total Budgeted	Total Cost for line item on grant budget	
Total Expensed	Sum of Direct Cost of all expenses against line item	
Total Remaining	= Total Budgeted – Total Expensed	
Program Income		
Income Unexpended for the Period	= Income Earned for the Period – Income Expended	
Total Earned for the Period GYTD	Current total of all income earned for the grant year	
Total Expended for Deduction Alternative GYTD	Current total of all income spent for the grant year	

Field/Date	Calculation/Source	Additional Information
Total Unexpended for the Period GYTD	Current net total of all income for the grant year	
Reporting Periods		
Due Dates	Grant Details	Due dates for Reporting Periods are set in the grant's <i>Post-Award tab>Settings>Grant Settings</i> .
Reminders	Grant Details	Reminders for Reporting Periods are set in the grant's <i>Post-Award tab>Settings>Reminders</i> .
Reporting Achievements		
Achieved Period To Date	Number of achievements for period	
Number of Goals With No Achievements	Number of goals without achievements for period	
Total Achieved To Date	Number of achievements for grant	
Variance	= planned goals - actual achievements	
Reporting Expenses		
Actual Grant Funded	= total grant-funded expenses for period	
Actual Match	= total match expenses for period	
Actual Total	= Actual Grant Funded + Actual Match + In-Kind Expenses	
Budgeted Amount	= allocated amount for period -- OR -- = prorated amount for period if no allocation	
Budgeted Grant Funded	Budgeted grant funded amount for period	
Budgeted Match	Budgeted match amount for period	
Budgeted Total	= Budgeted Grant Funded + Budgeted Match + In-Kind Budget	

Field/Date	Calculation/Source	Additional Information
Number of Categories Over Budget	Number of budget categories with expenses over the budget with a variance of more than 10% for the period	
Number of Categories Under Budget	Number of budget categories with expenses under the budget with a variance of more than 10% for the period	
Number of Categories Within 10% of Budget	Number of budget categories with a variance of +/- 10% for the period	
Number of Unreviewed Expenses	Number of expenses with a New status within the period	
Total Amount	= total expenses that have been reviewed before period end date	
Total Awarded Amount	= total of all Funding Sources	
Total Expense Amount To Date	= total of all expenses up to the last day of the period	
Variance	= Budgeted Total - Actual Total	
Variance for Period	= Budgeted Amount for period - Expenses for period	
Variance Grant To Date	= Budgeted Amount - Expenses	
Tasks		
Task Reminders	Grant Details	Task reminders are automatically generated based on the preferences selected in a grant's <i>Post-Award tab>Settings>Reminders</i> . Organizational Admin and Grant Managers can schedule up to three reminders for tasks, budget, and performance. Once a task has been completed, the user will no longer receive reminders for the task. If the task is past due, users will receive reminders in their daily or weekly email digests until the task is complete.

Field/Date	Calculation/Source	Additional Information
Timesheets		
Total Funded Hours (by Percentage)	= % of Hours x Total Hours Worked This Month	Funded Hours are hours being charged to a grant for an employee's compensation and benefits.
Total Hours	= Total Funded Hours + Total Unfunded Hours	
Total Unfunded Hours (by Percentage)	= % of Hours x Total Hours Worked This Month	Unfunded Hours are hours a staff member works outside of grants.
Tracking Periods		
Due Dates	Grant Details	Due dates for Tracking Periods are set in the grant's <i>Post-Award tab>Settings>Grant Settings</i> .
Reminders	Grant Details	Reminders for Tracking Periods are set in the grant's <i>Post-Award tab>Settings>Reminders</i> .
Tracking Achievements		
Achieved Period To Date	Number of achievements for period	
Number of Goals With No Achievements	Number of goals without achievements for period	
Total Achieved To Date	Number of achievements for grant	
Variance	= planned goals - actual achievements	
Tracking Expenses		
Actual Grant Funded	Total grant-funded expenses for period	
Actual Match	Total match expenses for period	
Actual Total	= Actual Grant Funded + Actual Match + In-Kind Expenses	
Budgeted Amount	= allocated amount for period -- OR -- = prorated amount for period if no allocation	

Field/Date	Calculation/Source	Additional Information
Budgeted Grant Funded	Budgeted grant-funded amount for period	
Budgeted Match	Budgeted match amount for period	
Budgeted Total	= Budgeted Grant Funded + Budgeted Match + In-Kind Budget	
Number of Categories Over Budget	Number of budget categories with expenses over the budget with a variance of more than 10% for the period	
Number of Categories Under Budget	Number of budget categories with expenses under the budget with a variance of more than 10% for the period	
Number of Categories Within 10% of Budget	Number of budget categories with a variance of +/- 10% for the period	
Number of Unreviewed Expenses	Number of expenses with a New status within the period	
Total Amount	= total expenses that have been reviewed before period end date	
Total Awarded Amount	= total of all Funding Sources	
Total Expense Amount To Date	= total of all expenses up to the last day of the period	
Variance	= Budgeted Total - Actual Total	
Variance for Period	= Budgeted Amount for period - Expenses for period	
Variance Grant To Date	= Budgeted Amount - Expenses	
Tracking Program Income		
Total Earned to Date	= total program income for grant	
Total Expended To Date	= total program income expended	

Field/Date	Calculation/Source	Additional Information
Total Unexpended To Date	= Total Earned to Date - Total Expended to Date	

Award Management

Award Details		
End Date	= Start Date + Length of Award	
Length of Award	Years, months, and days from the Start Date to End Date or Extended Date	
Total Awarded Amount	= Total of all funding sources	
Opportunity Details		
Total Program Funding	= Total of Commitments	This information pulls from a fund record's <i>Fund Management tab</i> >Commitments.

Contacts

Field/Date	Calculation/Source	Additional Information
Staff Compensation		
Benefit Amount	= Dollar amount or percentage of Annual Salary -- OR -- = Dollar amount or percentage of Hourly Rate x Hours Per Week x 52 weeks per year	

Grant Management

Field/Date	Calculation/Source	Additional Information
Amendments		
Approved End Date	= Award Start Date + Approved Length of Award	

Field/Date	Calculation/Source	Additional Information
Budget		
Category Subtotal	= total of all line items in category	
Grant Funded	<ul style="list-style-type: none"> Personnel Line Item = Salary + Benefits Non-Personnel Line Item = Direct Cost - Match Benefit Type Line Item = Direct Cost - Match 	Direct Cost = Grant Funded + Cash Match Amount+ In-Kind Amount
Indirect	= Total Expense Budget Cost x Indirect Rate	The Indirect Rate is set on <i>Post-Award>Settings>Budget Settings</i> . It may vary throughout the life of the grant.
Match	= Cash Match Amount + In-Kind Amount	
Total Cost	= Grant Funded + Match	
Total Earned	= total of all program income recorded in tracking or reporting periods	
Total Expense Budget Cost	= total of all categorized and uncategorized line items in the expense budget	
Total Overall Budget Cost	= Total Expense Budget Cost - Total Revenue	
Total Revenue	= total of all grant funding	
Total Revenue Budget Cost	= Total Revenue + Match + Total Earned (for additive method) --OR-- = Total Revenue + Match (for deductive method)	The Method of Expenditure (additive or deductive) is set on the Grant Details page for federally funded grants that record Program Income.
Benefit Type Budget Line Items		
Spread Evenly	= Direct Cost / Length of Award in Months	This spreads the Direct Cost evenly per month/year for the duration of the grant. If the duration starts at a partway through a month, the first and last month will be prorated.

Field/Date	Calculation/Source	Additional Information
Non-Personnel Budget Line Items		
Spread Evenly	= Direct Cost / Length of Award in Months	This spreads the Direct Cost evenly per month/year for the duration of the grant. If the duration starts at a partway through a month, the first and last month will be prorated.
Personnel Budget Line Items		
Benefits	= Staff Benefits x Designation To This Grant	
Designation to Awarded Grants	= sum of <i>Designation To This Grant</i> fields on all grants with Awarded status	
Designation to Pending Grants	= sum of <i>Designation To This Grant</i> fields on all grants with Pending status	
Designation to This Grant	= 100% - (Designation To Awarded Grants + Designation To Pending Grants)	
Direct Cost	= Salary + Benefits	
Salary	= Annual Salary x Designation To This Grant	
Spread Evenly	= Direct Cost / Salary Duration in Months	This spreads the Direct Cost evenly per month for the duration of the staff's compensation history. If the duration starts at a partway through a month, the first and last month will be prorated.
Budget Settings		
Post-Award Cash Match Amount	Grant Details	This pulls from the <i>Cash Match Amount</i> field in the <i>Post-Award Budget</i> section.
Post-Award In-Kind Match Amount	Grant Details	This pulls from the <i>In-Kind Match Amount</i> field in the <i>Post-Award Budget</i> section.
Rate Type Start and End Dates	Grant Start Date and Length of Award	The first Rate Type start date is the start date of the grant. The next start date is the day after the previous rate's end date, so that there are no gaps for the grant.

Field/Date	Calculation/Source	Additional Information
Use Match Percentage As	<ul style="list-style-type: none"> Percentage of Total Grant Budget = Match / Total Cost Percentage of Grant-Funded Amount = Match / Grant Funded 	
Expenses		
Cash Match	= Percentage Cash Match x Direct Cost	
In Kind	= Percentage In-Kind Match x Direct Cost	
Total Budgeted	Total Cost for line item on grant budget	
Total Expensed	= total of Direct Cost of all expenses against line item	
Total Remaining	= Total Budgeted - Total Expensed	
Grant Details		
Awarded Amount	Awarded Amount including any amendments	
Close Out Date	= End Date + 6 months	
Grant Budget	Sum of awarded amount and post-award match	
Length of Award	Years, months, and days from the Start Date to End Date or Extended Date	
Match Contributions	Sum of all match contributions from payment requests	This information pulls from <i>Post-Award tab >Cash Flow>Payment Requests</i> .
Outstanding Payment Requests	Sum of all payment requests that have been submitted but do not have a decision from the funder	This information pulls from <i>Post-Award tab >Cash Flow>Payment Requests</i> .
Payments	Sum of all paid payment authorizations	This information pulls from <i>Post-Award tab >Cash Flow>Payment Authorizations</i> .
Payments Approved	Sum of all approved payment requests	This information pulls from <i>Post-Award tab >Cash Flow>Payment Requests</i> .
Payments Received	Sum of all cash receipts	This information pulls from <i>Post-Award tab >Cash Flow>Cash Receipts</i> .

Field/Date	Calculation/Source	Additional Information
Payments Requested	Sum of all paid and pending payment requests	This information pulls from <i>Post-Award tab >Cash Flow>Payment Requests</i> .
Proposed Length of Award	Full years and months	The proposed length of award is calculated by the number of years (12 months) and any additional months. For example, a proposed length of award of 18 months is 1 year and 6 months.
Remaining Award	= Awarded Amount - Payments Requested	
Remaining Budget	= Remaining Award + Remaining Match	
Remaining Match	= Total Match - Match Contributions	
Total Budget	= Awarded Amount + Cash Match Amount + In-Kind Match Amount	
Total Expenses	Sum of all reviewed expenses	
Total Match	Sum of post-award cash and in-kind match	
Total Projected Budget	= Requested Amount + Cash Match Requirement + In-Kind Match Requirement	
Payment Authorizations		
Total Amount Approved	Total Amount Approved on payment request	This information pulls from <i>Post-Award tab >Cash Flow>Payment Requests</i> .
Payment Requests		
Match Contribution	= total of Match from all included closed tracking or reporting periods	
Net Contribution	= Match Contribution + Program Income	
Net Costs	Sum of Budget Category expenses	
Net Total	= Remaining Balance + Projected Expenses – Net Contribution --OR-- = Net Costs + Net Contribution	The first calculation is for Advance payment requests, the second is for Reimbursement payment requests.

Field/Date	Calculation/Source	Additional Information
Program Income	= total of Program Income from all included closed tracking or reporting periods	
Remaining Balance	= Total Amount Received To Date - (total Net Costs from payment requests with a Paid status - total Net Contribution from payment requests with a Paid status)	
Sub-Awards		
Length of Award	Years, months, and days from the Start Date to End Date or Extended Date	

Fund Management

Field/Date	Calculation/Source	Additional Information
Fund Details		
Total Funding Committed	Sum of Commitments	This information pulls from <i>Fund Management tab>Commitments</i> .
Total Income Received	Sum of Income	This information pulls from <i>Fund Management tab>Income</i> .
Total Disbursements	= total of Payment Authorizations	This information pulls from <i>Grant Management>Post-Award tab>Payment Authorizations</i> .
Current Fund Cash Balance	= Total Income Received - Total Disbursements	
Outstanding Obligations	= total of Awards - Total Disbursements	This information pulls from <i>Fund Management tab>Awards</i> .
Available Funds	= Current Fund Cash Balance - Outstanding Obligations	
Pending Opportunities	= total of Opportunities (not yet awarded)	This information pulls from <i>Fund Management tab>Opportunities</i> .
Opportunity Details		
Total Program Funding	= Total of Commitments	This information pulls from a fund record's <i>Fund Management tab>Commitments</i> .

Field/Date	Calculation/Source	Additional Information
Award Details		
End Date	= Start Date + Length of Award	
Length of Award	= Years + Months	The length of award is calculated by the number of years (12 months) and any additional months. For example, a length of award of 1 year and 6 months has a total length of 18 months.
Total Awarded Amount	= Total of all funding sources	This information pulls from a fund record's <i>Fund Management tab>Awards</i> .

Reports

Field/Date	Calculation/Source	Additional Information
Pre-Award		
Award Status Report		
Dollar Hit Rate	= total dollars awarded / total dollars requested	Total dollars requested include all approved and denied dollars.
Percent Hit Rate	= total awards / total applications	Total applications include all approved and denied applications.
Staff Allocation Detail Report		
Allocation	= percent designated to each awarded grant	
Salary	= Annual Salary x Allocation	
Staff Allocation Overview Report		
Percent	= percent allocated	
Salary	= Annual Salary x Percent	
Submission Budget Report		
Cash Match	Budget Line Item	
Grant Funded	<ul style="list-style-type: none"> • Personnel Line Item = Salary + Benefits • Non-Personnel Line Item = Direct Cost • Benefit Type Line Item = Direct Cost 	Direct Cost = Grant Funded + Cash Match Amount + In-Kind Amount
In-Kind Match	Budget Line Item	

Field/Date	Calculation/Source	Additional Information
Total	= Grant Funded + Cash Match + In-Kind Match	
Post-Award		
Award Status Report		
Performance Percentage	= completed goals / total goals	
Spend Down Percentage	= total expense / total budgeted	
Employee Activity Report		
Actual Total	= percentage of salary allocated to grant	
Budget Total	= Direct Cost	Direct Cost = Grant Funded + Cash Match Amount + In-Kind Amount
On Target	= at or above 100% of allocation	
Spend Down	= Actual Total / Budgeted Total	
Variance	= Actual Total - Budgeted Total	
Variance Percentage	= Variance / Budgeted Total	
GL Account Overview Report		
Actual Amount	= sum of expenses attached to GL Code	
Grant Budget Variance Report		
Actual Cash Match	= Percentage Cash Match x Direct Cost	
Actual Grant Funded Amount	= expenses against budgeted grant funded amount	
Actual In-Kind Match	= Percentage In-Kind Match x Direct Cost	
Actual Total	= Actual Grant Funded Amount + Actual Cash Match + Actual In-Kind Match	
Spend Down Percentage	= total expense / total budgeted	
Variance Amount	= Actual Total - Budgeted Total	
Variance Percentage	= Variance Amount / Budgeted total	

Field/Date	Calculation/Source	Additional Information
Grant Goal Achievement Report		
Variance	= (Achieved Amount - Goal Amount) / Goal Amount	
Grant Performance Variance Report		
Variance	= (Achieved Amount - Goal Amount) / Goal Amount	
Overall Grant Variance Detail Report		
On Target	= at or above 100% of allocation	
Spend Down	= Actual Total / Budgeted Total	
Overall Grant Variance Report		
Performance Percentage	= completed goals / total goals	
Spend Down Percentage	= Actual Total / Budgeted Total	
Unit Goal Detail Report		
Variance Amount (for Reimbursement Goals)	= Reimbursement - Budgeted	
Variance Percentage (for Numeric Goals)	= (Achieved Amount - Goal Amount) / Goal Amount	
Recipient		
Recipient Grant Budget Variance Report		
Actual Cash Match	= Percentage Cash Match x Direct Cost	
Actual Grant Funded Amount	= expenses against budgeted grant funded amount	
Actual In-Kind Match	= Percentage In-Kind Match x Direct Cost	
Actual Total	= Actual Grant Funded Amount + Actual Cash Match + Actual In-Kind Match	
Spend Down Percentage	= Actual Total / Budgeted Total	
Variance Amount	= Actual Total - Budgeted Total	

Field/Date	Calculation/Source	Additional Information
Variance Percentage	= Variance Amount / Budgeted Total	
Recipient Grant Funded Variance Report		
Grant Funded Budgeted	= Budgeted Awarded Amount	
Grant Funded Expenditures GTD	= Direct Cost - (Cash Match + In-Kind Match)	
Grant Funded Expenditures YTD	= Direct Cost - (Cash Match + In-Kind Match)	
Remaining Balance	= Grant Funded Budgeted - Grant Funded Expenditures GTD	
Variance Grant to Date	= Grant Funded Expenditures GTD / Grant Funded Budgeted	
Sub-Award Overall Grant Variance Detail		
On Target	= at or above 100% of allocation	
Spend Down	= Actual Total / Budgeted Total	
Total On Target	= On Target / Total	
Sub-Award Overall Variance (By Grant)		
Performance %	= completed goals / total goals	
Spend Down %	= Actual Amount / Budgeted Amount	
Sub-Award Overall Variance (By Sub)		
Performance %	= completed goals / total goals	
Spend Down %	= Actual Amount / Budgeted Amount	
Project		
Individual Project Report		
On Target	= at or above 100% of allocation	
Spend Down	= Actual Amount / Budgeted Amount	
Project Budget Variance Report		
Actual Cash Match	= Percentage Cash Match x Direct Cost	
Actual Grant Funded Amount	= expenses against budgeted grant funded amount	

Field/Date	Calculation/Source	Additional Information
Actual In-Kind Match	= Percentage In-Kind Match x Direct Cost	
Actual Total	= Actual Grant Funded Amount + Actual Cash Match + Actual In-Kind Match	
Spend Down Percentage	= 100% - Variance Percentage	
Variance Amount	= Actual Grant Funded Amount - Budgeted Total	
Variance Percentage	= Variance Amount / Budgeted Total	
Project Funding Detail Report		
Funded Amount	= Awarded Amount	
Funded Percentage	= Funded Amount / Unfunded Amount	
Unfunded Amount	= Project Budgeted Amount - Funded Amount	
Project Funding Overview Report		
Funded Amount	= Awarded Amount	
Funded Percentage	= Funded Amount / Unfunded Amount	
Unfunded Amount	= Project Budgeted Amount - Funded Amount	
Project Performance Variance Report		
Variance	= (Achieved Amount - Goal Amount) / Goal Amount	
Time & Effort		
Time and Effort Detail		
Actual Percentage	= Actual Hours / Total Hours	
Planned Percentage	= Designation To This Grant	
Remaining Amount Allocated	= Remaining Percentage Allocated x Planned Amount	
Remaining Hours Allocated	= Total Allocated - Total Actual Hours	
Remaining Percentage Allocated	= Planned Percentage - Actual Percentage	