AmpliFund™

Grants Management

Recipient Guide

Contents

Recipient Overview

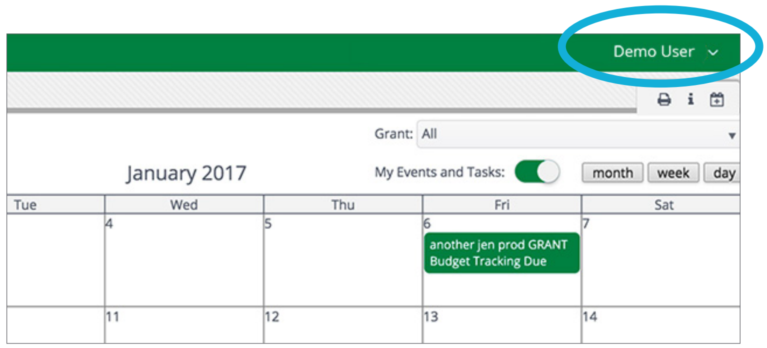
This guide is for grant recipients who have received an invitation to log in to AmpliFund from their funder along with the notification of their award. As a grant recipient, you will be able to view and edit your grant details, track your progress and expenses, and submit amendments to the funding organization. AmpliFund allows you to manage your grant and engage with the funding organization with transparency.

Once you log in to AmpliFund, the funding organization will be notified that you have accepted the award. For more information on using AmpliFund, review our user guides, video tutorials, FAQs, and more on the AmpliFund Support Site, amplifund.zendesk.com.

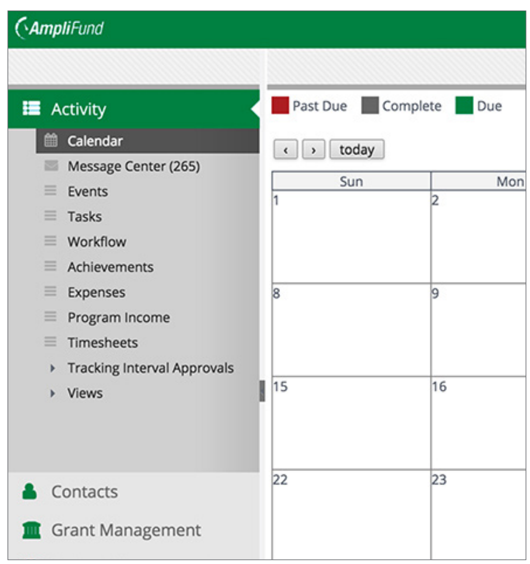
Getting Started in AmpliFund

AmpliFund uses menus, tabs, and icons for navigation and actions. You can also review the AmpliFund User Interface Navigation guide on our Support Site for more information.

User Navigation Menu



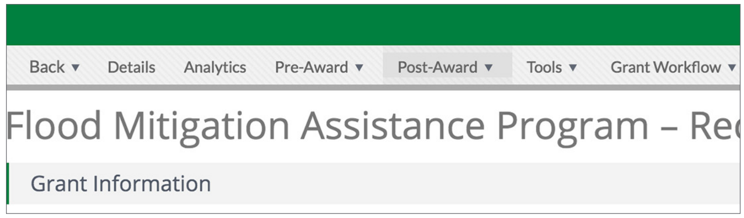
Click your name in the top-right corner of AmpliFund to access account information, change password, message center, support, terms and conditions, and logout.



Left Navigation Panel

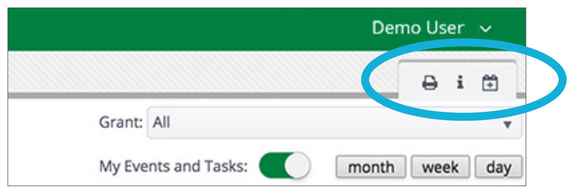
The left navigation panel is the main navigation for AmpliFund. Click any of the top-level menu items to expand, and click any sub-level item to open a page. Most menu pages (i.e. *Contacts>Staff*) will take you to a list view. To view a list item's details, click the item's name.

Context-Specific Tabs



Once you navigate to an item's details, you will see context-specific tabs above item. This menu will show additional information related to that item.

Icons



Icons allow you to perform actions on an item, such as edit, add, or delete. Icons may appear next to an item in a list view, or in the *Icon Bar* just below the User Navigation Menu. Hover over any icon to see its action.

Calendar

When you first log in, you will see the Calendar. This will show any tasks or events for your award.

Before You Can Manage Your Grant

Before you can manage your grant, you will need to add any other users from your organization (including your Grant Manager and Responsible Individual), import GL account codes, and add grant details, configure and create the grant budget, create the grant performance plan, and assign roles and responsibilities. This section of the guide is intended for users who will set up the account and grant.

Icons

	Print
	Help
	Save Current View
	Create
	Edit
	Delete
	Act as User
	Invite to AmpliFund
	Import
	Export

Account Set Up

This section describes the minimum actions needed for Organizational Admin users to set up an AmpliFund account. For more information on account administration, see the AmpliFund Administration User Guide.

How To Add a New User

Prerequisite: Must be an Organizational Admin

Adding a new user to AmpliFund will automatically add them to your *Contacts>Staff* list. Users must be sent an invitation before they can access AmpliFund.

1. Open **Administration>System Security>Users**.
2. Click the **+ (Create Icon)** in the *Icon Bar*.

User Information

3. Select if the user will **Subscribe to Daily Emails** or **Subscribe to Weekly Emails**. Once the user activates their account, they can update their email subscription preferences.
4. Select the user's security **Role**. For more details on security roles, see Security Roles.
   - **Organizational Admin:** Can create, view, and edit all records in the account.
   - **Executives:** Can view all records in the account.
   - **Department Admin:** Can create, view, and edit all grant records linked to their department(s).
   - **Department User (Salary):** Can view all grant records linked to their department(s).
   - **Department User (No Salary):** Can view all grant records linked to their department(s), excluding budget personnel line items.

Staff Information

5. Add the user’s **First Name** and **Last Name**.
6. Add the user's job **Title** (optional).
7. Select the user's **Supervisor** (optional). This lists pulls from *Contacts>Staff*.
8. In the *Track Time* dropdown, select how frequently the user will **track their time** for timesheets.

9. Add the user's **primary address** (optional).
10. Add the user's primary **Email Address**.
11. Click **Create**.

12. To send the user an invitation to AmpliFund, click the **(Invite to AmpliFund icon)** in the *Icon Bar*. The user will receive an email with a link prompting them to create a password.
13. In the confirmation pop-up window, click **Send Invitation**.

Note

The user's email address will also be used as their account login, so it must be unique and cannot be changed. However, additional contact email addresses may be added and edited.

How To Import GL Accounts

Prerequisite: Must be an Organizational Admin

The GL Accounts template and other import templates are available on the AmpliFund Support Site. Each import file is an Excel spreadsheet with column headers that correspond to AmpliFund fields. Additional columns should not be added to the import files. Required fields are marked with asterisks (*) next to the field names.

After the import template completed and saved, the data can be imported into AmpliFund.

14. Open **Administration>Lists>GL Accounts**.
15. Click the **(Import icon)** in the *Icon Bar*.
16. In the pop-up window, click **Choose a file** to select a file from your computer.
17. Select the **Destination** field for each Source column. If you are using the GL Accounts Import Template (recommended), the source and destination fields should match.
18. Click **Create**.

Icons

- Print
- Help
- Save Current View
- Export
- Edit

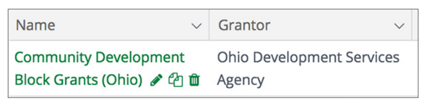
Grant Set Up

This section describes the minimum actions needed for Organizational Admin, Department Admin, or Grant Managers to set up grant information. For more information on grant management, see the AmpliFund Grant Management User Guide.

How To Add Grant Details

The grant details are shared between your organization and the funder. On the Details page, you will see funder-added information, and can add your recipient-specific information. The information you add on this page will be visible to the funder unless stated otherwise.

1. Open **Grant Management>Grants>All Grants**.
2. Click on the **(Edit icon)** next to a grant name.



Award Status

3. Update **Recipient Award Name** (optional).

Award Information

4. Select the **Recipient Grant Manager**. This list populates from *Contacts>Staff*. Grant Managers have full access to edit grant details, and create, edit, and delete all items related to their grant. These users may also assign responsibility for goals and line items to other users.
5. Add **Recipient Description** of the grant (optional).

Record Information

6. Add a **Unique Identifier** (optional). This Unique Identifier could be used to link the grant to another system that you use. This information will not be visible to the funding organization.
7. Click **Save**.

Icons

- Print
- Help
- Save Current View
- Export
- Edit

Budget Set Up

Once your budget is set up, you can begin to track expenses against your planned budget. Budgets show the budget categories, grant-funded amounts, match amounts, total costs, and total revenue by default. Additionally, the projects, recipients, grant years, line items, Responsible Individuals, and GL accounts can be shown or hidden.

Budget settings define a grant's default match and indirect cost rate, budget categories, and benefit types. The budget settings should be configured before adding budget categories or line items. In addition, budget settings can be set on the category or line item.

For more information on budgets, see the AmpliFund Grant Management User Guide.

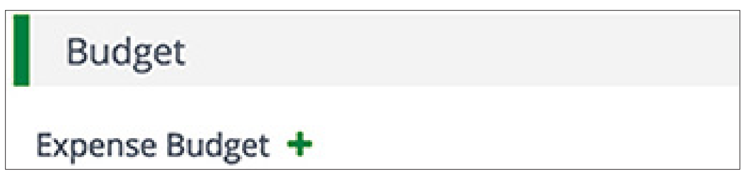
How To Add a Category to the Budget

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

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

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Financial>Budget**.
4. Click the **+ (Add icon)** next to *Expense Budget*.

Note
Line items within the budget category will inherit its settings.



Category Details

5. In the pop-up window, select a **Category**. This list pulls from the categories created in the *Post-Award tab>Settings>Budget Settings*.
   a. If the category is not listed, click **Add New Category to Budget**.
   b. In the *Categories* section, select a **Budget Category** and click **Add**.
   c. Click **Save**.
6. Enter the **Budgeted Amount** for the category. The sum of the line items within this budget category cannot exceed this amount.
7. Select the **Indirect Cost** requirements for all line items within the category.
   - **Disable:** indirect cost will not be tracked within the budget category

Note
Depending on your grant budget settings as set by the funder, this option may not be available.

- **Enable:** indirect cost may be tracked within the budget category on a per-line item basis
- **Require:** indirect cost will always be tracked within the budget category

8. Select the **Cash Match** requirements for all line items within the category.
   - **Disable:** cash match will not be tracked within the budget category
   - **Enable:** cash match may be tracked within the budget category on a per-line item basis
   - **Require:** cash match will always be tracked within the budget category
9. Select the **In-Kind Match** requirements for all line items within the category.
   - **Disable:** in-kind match will not be tracked within the budget category
   - **Enable:** in-kind match may be tracked within the budget category on a per-line item basis
   - **Require:** in-kind match will always be tracked within the budget category

Change Restrictions

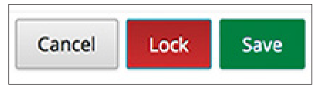
10. Check the **Enable Expense Cap checkbox** to set a category expense cap. This will prevent expenses within a category from exceeding the capped amount.
    a. Add **expense cap amount**.

Spending Alerts

11. Check the **Enable Monthly Spending Alerts checkbox** to add spending alerts to the category. Spending alerts will notify the Grant Manager if a category is under- or overspent for during a month.
    a. Add **under monthly allocated budget** in dollars or percentage (optional).
    b. Add **over monthly allocated budget** in dollars or percentage (optional).
12. Check the **Enable Total Spending Alerts checkbox** to add total spending alerts to the category. Spending alerts will notify the Grant Manager weekly if a category is within a designated percentage of the total line item budget.
    a. Add **percentage of total line item budget.**
13. Click **Lock** to prevent line items being added to the category or the category being edited (optional).

Note

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



14. Click **Create**.

How To Unlock a Category on the Budget

Prerequisite: Must be Organizational Admin, Department Admin, or Grant Manager.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Financial>Budget**.
4. Click the **(Edit icon)** next to a locked category's name.

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

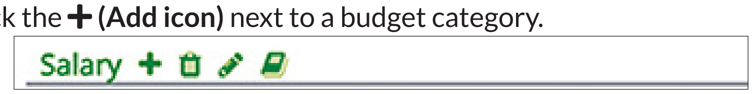
6. Click **Save**.

How To Add a Budget Line Item

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

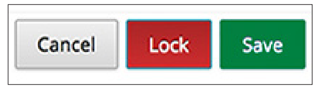
There are three line items types: Personnel, Non-Personnel, and Benefit Type line items. Personnel line items are budgeted staff compensation expenses. Non-personnel line items are budgeted expenses that do not fund staff compensation. Benefit Type line items are planned benefit expenses for all grant-funded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

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Financial>Budget**.
4. Click the **+ (Add icon)** next to a budget category.



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

6. Add line item information.
7. Click **Lock** to prevent line items being added to the category or the category being edited (optional).



8. Click **Create**.

How To Add a **Personnel** Budget Line Item

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

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Financial>Budget**.
4. Click the **+ (Add icon)** next to a budget category.
5. In the *General tab* of the pop-up window, select **Personnel** from the *Item Type* dropdown.
6. Select the **Category**.

Note

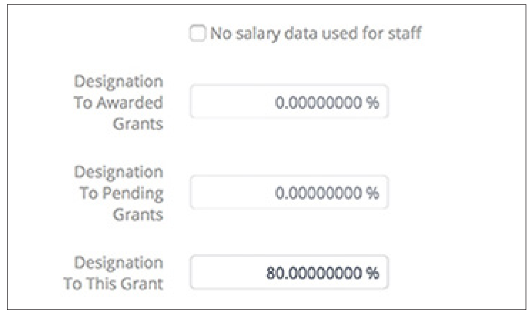
If the employee has compensation history, the salary defaults to the compensation amount for the period. The *Designation to Awarded* and *Designation to Pending Grants* percentages show the percent of the salary already designated to other grants' personnel line items.

7. Select the **Employee** name. This list pulls from *Contacts>Staff*.
   a. If the employee is unknown, check the **Choose employee at later date checkbox**.
   b. Add a line item **Name**.

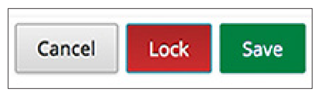
8. Add the **Position** (optional).
9. Add the amount of funded **Salary**.
10. Add **Benefits** and **Direct Cost** (optional).
11. Check the **Exclude From Match checkbox** as necessary. This option will not be available if the category match requirements are set to *Disable* or *Require*.
12. Check the **Exclude From Indirect checkbox** as necessary. This option will not be available if the category indirect requirements are set to *Disable* or

Require.

13. Check the **No Salary Data Used for Staff** as necessary.
    a. If unchecked, add **Designation To This Grant percentage** (in decimal format) to update the *Salary* amount (optional).



14. Select the **Responsible Individual**. Responsible Individuals are responsible for overseeing a performance goal or line item's completion. They can view grant details, performance plans, or budget plans. This list pulls from *Contacts>Staff*.
15. Add a **Description** (optional).
16. Click **Lock** to prevent line item from being edited (optional).



17. Click **Create**.

How To Add a Non-Personnel Budget Line Item

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

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Financial>Budget**.
4. Click the **+ (Add icon)** next to a budget category.
5. In the *General tab* of the pop-up window, select **Non-Personnel** from the *Item Type* dropdown.
6. Add a line item **Name**.
7. Add the **Direct Cost**.
8. Check the **Exclude From Match checkbox** as necessary. This option will

not be available if the category match requirements are set to *Disable* or *Require*.

9. Check the **Exclude From Indirect checkbox** as necessary. This option will not be available if the category indirect requirements are set to *Disable* or *Require*.
10. Select the **Responsible Individual**. Responsible Individuals are responsible for overseeing a performance goal or line item's completion. They can view grant details, performance plans, or budget plans. This list pulls from *Contacts>Staff*.
11. Add a **Description** (optional).
12. Click **Lock** to prevent line item from being edited (optional).

13. Click **Create**.

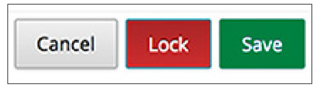
How To Add a **Benefit Type** Budget Line Item

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

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

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Financial>Budget**.
4. Click the **+ (Add icon)** next to a budget category.
5. In the *General tab* of the pop-up window, select **Benefit Type** from the *Item Type* dropdown.
6. Select a **Benefit Type**.
7. Add the **Direct Cost**.
8. Check the **Exclude From Match checkbox** as necessary. This option will not be available if the category match requirements are set to *Disable* or *Require*.
9. Check the **Exclude From Indirect checkbox** as necessary. This option will not be available if the category indirect requirements are set to *Disable* or *Require*.

10. Select the **Responsible Individual**. Responsible Individuals are responsible for overseeing a performance goal or line item's completion. They can view grant details, performance plans, or budget plans. This list pulls from *Contacts>Staff*.
11. Add a **Description** (optional).
12. Click **Lock** to prevent line item from being edited (optional).



13. Click **Create**.

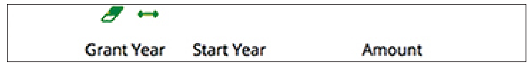
How To Add Financial Information to a Budget Line Item

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

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Financial>Budget**.
4. Click the **(Edit icon)** next to a line item.

5. In the pop-up window, open the **Financials tab**.
6. Add the **Cash Match Amount** and **In-Kind Match Amount** in dollars or percentages.

7. Select a **GL account**. This list pulls from *Administration>Lists>GL Accounts*.
8. Click **Add**. You can add multiple GL accounts if necessary.
9. Select if you wish to view your allocations **Yearly** or **Monthly**.
10. Add **allocation amounts**. Click the **(Clear icon)** to remove all selections. Click the ↔ **(Spread Evenly icon)** to spread amounts equally over the grant's months.



11. Click **Save**.

How To Add Benefits Information to a Personnel Budget Line Item

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

1. Open **Grant Management>Grants>All Grant**s.
2. Click a **grant name**.
3. Open the **Post-Award tab>Financial>Budget**.
4. Click the **(Edit icon)** next to a line item.

5. In the pop-up window, open the **Benefits tab**.
6. Select the **Supported Benefit Type**. This list pulls from the *Post-Award tab>Settings>Budget Settings*.
7. Click **Add**. You can add multiple benefit types if necessary.
8. Add the benefit **Amount** in dollars or percentages.
9. Check **Exclude From Match** and **Exclude From Indirect checkboxes** as necessary.
10. Click **Save**.

How To Add an Expense Cap to a Budget Line Item

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

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Financial>Budget**.
4. Click the **(Edit icon)** next to a line item.
5. In the pop-up window, open the **Configuration tab**.

6. Add the **Expense Cap**. This will prevent expenses within a line item from exceeding the capped amount.
7. Check the **Do not allow expenses to exceed checkbox** as necessary. If selected, expenses cannot be imported or added over the cap amount.
8. Click **Save**.

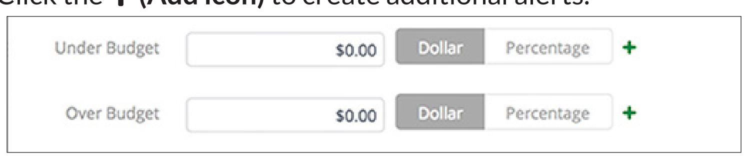
How To Add Spending Alerts to a Budget Line Item

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

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Financial>Budget**.
4. Click the **(Edit icon)** next to a line item.
5. In the pop-up window, open the **Configuration tab**.

Spending Alerts

6. Check the **Per Tracking Period checkbox** to add spending alerts for tracking periods. Spending alerts will notify the Grant Manager if a line item is under- or overspent for a tracking period.
   a. Add **Under Budget amount** in dollars or percentage (optional).
   b. Add **Over Budget amount** in dollars or percentage (optional).
   c. Click the **+ (Add icon)** to create additional alerts.



7. Check the **Life of Grant checkbox** to add spending alerts for the life of the grant. Spending alerts will notify the Grant Manager if a line item is within a designated percentage of the total line item budget.
   a. Add **percentage** (in decimal format) in the *Within % of total budget* field (optional).
   b. Click the **+ (Add icon)** to create additional alerts.

8. Click **Save** to save your changes.

How To Add an Attachment to a Budget Line Item

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

How To Unlock a Budget Line Item

Prerequisite: Must be Organizational Administrator, Department Admin, or Grant Manager

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Financial>Budget**.
4. Click the **(Edit icon)** next to a locked line item.

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

6. Click **Save**.

How To Import Budget Line Items

Organizational Administrators and Grant Managers can import multiple budget line items using the [Budget Import Template](#) (recommended) or their own Excel file. The Budget Import Template includes the Grant ID, Line Item Type*, Budget Category*, Benefit Type, Name*, Description, GL Account ID, GL Name, GL Code, Class 1, Class 2, Class 3, Responsible Staff*, Direct Cost*, Project Line Item, Exclude From Match, Exclude From Indirect, Cash Match

Note

The GL Code, GL Name, GL Class 1, and GL Class 2 must **exactly match** what is in *Administration>Lists>GL Accounts*. If you have defined your GL Accounts, you must ensure that the column headers and number of columns match what you have defined in *Administration>License Information>Settings tab*. The Responsible Staff and Personnel Staff names must **exactly match** what is in *Contacts>Staff*

Value, Cash Match Type, In-Kind Match Value, In-Kind Match Type, Personnel Staff, and Personnel Title fields. Required fields have asterisks (*) next to their names.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Financial>Budget**.
4. Click the **(Import icon)** in the *Icon Bar*.
5. In the pop-up window, click **Choose a file** to select a file from your computer.
6. Select the **Destination** field for each Source column. If you are using the Budget Import Template (recommended), the source and destination fields should match.
7. Click **Import**.

How To Import Budgets

Note

The GL Code, GL Name, GL Class 1, and GL Class 2 must **exactly match** what is in *Administration>Lists>GL Accounts*. If you have defined your GL Accounts, you must ensure that the column headers and number of columns match what you have defined in *Administration>License Information>Settings tab*. The Responsible Staff and Personnel Staff names must **exactly match** what is in *Contacts>Staff*

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

1. Open **Grant Management>Grants>All Grants**.
2. Click the **(Import icon)** in the *Icon Bar*.
3. In the pop-up window, select **Budget Import** from the *Choose Import* dropdown.
4. In the *Award Type* dropdown, select **Post-Award**.
5. Select to *Identify Grant by* grant **ID** or **Unique Identifier**.
6. In the pop-up window, click **Choose a file** to select a file from your computer.
7. Select the **Destination** field for each Source column. If you are using the Budget Import Template (recommended), the source and destination fields should match.
8. Click **Import**.

Icons

Print
Help
Create
Grant Performance Plan Report
Save Current View
Import
Export
Edit
Copy
Delete
Achievements

Performance Set Up

A grant's performance is measured by achievements against programmatic goals. If achievements are not meeting their given goal allocations, the grant's performance risk may be impacted. Once your performance plan is set up, you can begin to track achievements against performance goals.

The Performance Plan list shows the *Name*, *Goal Type*, *Responsible Individual*, and *Strategy* columns by default. In addition, the following columns may be shown: *Status*, *Created By*, *Created Date*, *Modified By*, and *Modified Date*. Each of these columns may be shown or hidden, sorted, or filtered. See the AmpliFund User Interface Navigation Guide to learn more.

Goal Types

Goals are measurable activities planned to ensure grant deliverables are met on the grant's timeline. Each goal must have a Responsible Individual who will be responsible for tracking achievements against that goal . AmpliFund has six types of goals.

Milestone Goal

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

Narrative Goal

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

Numeric Goal

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

Percent Achieved Goal

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

Percent Change Goal

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

Reimbursement Goal

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

Note

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

How To Add a Performance Goal

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

Prerequisite: Must be Organizational Administrator, Department Admin, or Grant Manager and have performance plan creation permissions as set by the funding organization in AmpliFund

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Performance>Performance Plan**.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. In the pop-up window, select a **Strategy** (optional). This will link the goal to an existing strategy.
6. Select a **Goal Type**. This could be Milestone, Narrative, Numeric, Percent Achieved, Percent Changed, or Reimbursement.
7. Add the goal information.
8. Click **Save**.

How To Add a **Milestone** Performance Goal

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

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

3. Open the **Post-Award tab>Performance>Performance Plan**.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. In the pop-up window, select a **Strategy** (optional). This will link the goal to an existing strategy.
6. In the *Goal Type* dropdown, select **Milestone**.
7. Add the goal **Name**.
8. Add the goal **Description** (optional).
9. Select the **Responsible Individual**. This list pulls from *Contacts>Staff* for your organization or the recipient's organization (if on an award record). The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.
10. Select a goal **Due Date**.
11. Click **Create**.

How To Add a **Narrative** Performance Goal

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

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Performance>Performance Plan**.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. In the pop-up window, select a **Strategy** (optional). This will link the goal to an existing strategy.
6. In the *Goal Type* dropdown, select **Narrative**.
7. Add the goal **Name**.
8. Add the goal **Description** (optional).
9. Select the **Responsible Individual**. This list pulls from *Contacts>Staff* for your organization or the recipient's organization (if on an award record). The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.
10. Add the **Question** that the goal will answer.
11. Click **Create**.

How To Add a **Numeric** Performance Goal

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

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Performance>Performance Plan**.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. In the pop-up window, select a **Strategy** (optional). This will link the goal to an existing strategy.
6. In the *Goal Type* dropdown, select **Numeric**.
7. Add the goal **Name**.
8. Add the goal **Description** (optional).
9. Select the R**esponsible Individual**. This list pulls from *Contacts>Staff* for your organization or the recipient's organization (if on an award record). The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.
10. Add the **Number To Be Achieved**.
11. Click **Create**.

How To Add a **Percent Achieved** Performance Goal

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

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Performance>Performance Plan**.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. In the pop-up window, select a **Strategy** (optional). This will link the goal to an existing strategy.

6. In the *Goal Type* dropdown, select **Percent Achieved**.
7. Add the goal **Name**.
8. Add the goal **Description** (optional).
9. Select the **Responsible Individual**. This list pulls from *Contacts>Staff* for your organization or the recipient's organization (if on an award record). The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.
10. Add the **Percent Desired**.
11. Click **Create**.

How To Add a **Percent Changed** Performance Goal

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

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Performance>Performance Plan**.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. In the pop-up window, select a **Strategy** (optional). This will link the goal to an existing strategy.
6. In the *Goal Type* dropdown, select **Percent Changed**.
7. Add the goal **Name**.
8. Add the goal **Description** (optional).
9. Select the **Responsible Individual**. This list pulls from *Contacts>Staff* for your organization or the recipient's organization (if on an award record). The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.
10. Add the **Current Percent** and **Percent Desired**.
11. Click **Create**.

How To Add a **Reimbursement** Performance Goal

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

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

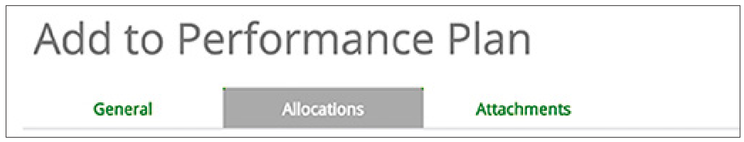
Note

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

How To Add Allocations to a Performance Goal

Narrative, Numeric, Percent Achieved, Percent Changed, and Reimbursement goals allow you to add allocations. Allocations help you plan your goals by year or month.

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



6. Select if you wish to view your allocations **Yearly** or **Monthly**.
7. Add **allocation amounts**. Click the **(Clear icon)** to remove all selections. Click the **(Spread Evenly icon)** to spread amounts equally over the grant's months.

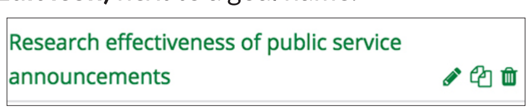
Note
If selected, any changes to the goal will be automatically reflected in the grant's budget.

8. Click **Save**.

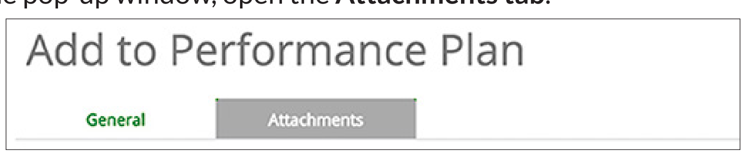
How To Add an Attachment to a Performance Goal

All goals allow you to add an attachment.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Performance>Performance Plan**.
4. Click the **(Edit icon)** next to a goal name.

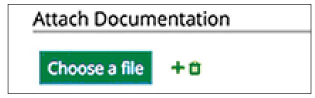


5. In the pop-up window, open the **Attachments tab**.



6. Click **Choose a file** to select a file from your computer.

7. Click the **+ (Add icon)** to add additional files (optional).



8. Click **Save**.

How To Import Performance Goals

Note

The Individual name must **exactly match** what is in *Contacts>Staff*.

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

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Performance>Performance Plan**.
4. Click the **(Import icon)** in the *Icon Bar*.
5. In the pop-up window, click **Choose a file** to select a file from your computer.
6. Select the **Destination** field for each Source column. If you are using the Performance Plan Import Template (recommended), the source and destination fields should match.
7. Click **Import**.

How To Import Performance Plans

Note

The Individual name must **exactly match** what is in *Contacts>Staff*.

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

1. Open **Grant Management>Grants>All Grants**.
2. Click the **(Import icon)** in the *Icon Bar*.
3. In the pop-up window, select **Performance Plan Import** from the *Choose Import* dropdown.
4. In the *Award Type* dropdown, select **Post-Award**.

5. Select to *Identify Grant by* grant **ID** or **Unique Identifier**.
6. In the pop-up window, click **Choose a file** to select a file from your computer.
7. Select the **Destination** field for each Source column. If you are using the [Performance Plan Import Template] (recommended), the source and destination fields should match.
8. Click **Import**.

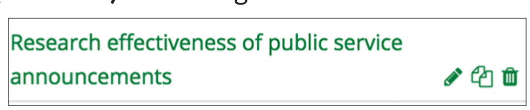
Note
Depending on your account settings, this record type may have additional custom fields or sections.

How To Add a Performance Strategy

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Performance>Performance Strategies**.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. In the pop-up window, add a strategy **Name**.
6. Add a **Description** (optional).
7. Click **Create**.

How To Link a Strategy to a Goal

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Performance>Performance Plan**.
4. Click the **(Edit icon)** next to a goal name.



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

Managing Your Grant

Once you've set up your grant, you are ready to manage your grant's progress through expenses, achievements, reporting periods, and payment requests. Additionally, you can access documents from the funding organization and complete any assigned tasks.

Icons

- Print
- Help
- Save Current View
- Export
- Edit
- Copy
- Delete

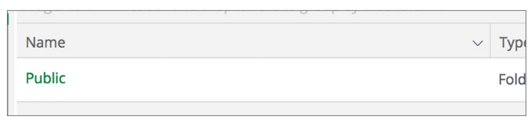
Tools

Grant tools include documents (files), tasks, notes, and emails.

How To Access Grant Documents from Funder

Any file uploaded to your grant or grant-related items is centrally stored in the Documents section of AmpliFund. Additionally, funders and recipients can share files in the grant's Public folder. All other documents will not be shared unless specifically submitted to the funder, such as attachments on payment requests.

1. Open **Documents>Grants.**
2. Click a **grant name**.
3. Click **Public**.

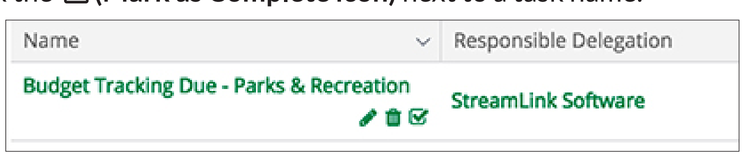


4. Click a **document name** to view.

How To Mark a Task as Complete

Tasks can be system-generated or user-created. Once a task has been assigned, the assignee(s) will receive up to three email reminders based on the task settings. Once a task is completed, no further email reminders will be sent. If a task is not completed by its due date, daily email reminders will be sent to the assignee until the task is completed.

1. Open **Activity>Tasks**.
2. Click the ☑ **(Mark as Complete icon)** next to a task name.



3. In the confirmation pop-up window, click **Mark as Complete**.

-- OR --

1. Open **Activity>Calendar**.

2. Click on a **task**.
3. In the pop-up window, click **Mark as Completed**.

Icons

- Create
- Edit
- Select All
- Delete

Expenses

As you spend down against budgeted line items, that line item's partial or whole completion may be marked at any time by adding an expense record. Expenses may be added through the Expenses list, budget, or the grant's *Post-Award tab>Financial>Expenses*. Depending on your account settings, there may be additional fields or sections in a *Custom tab*. Expenses can also be included in Reporting Periods to the funder.

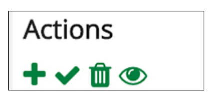
How To Add an Expense

Prerequisite: Must be an Organizational Admin, Department Admin, Grant Manager, Additional Staff, or Responsible Individual; Grant must allow manual entry for GL Actuals on Grant Details page

Expenses are charges spent against a planned grant budget line item. If an expense exceeds a line item's spending alert, the Grant Manager will receive an email notification. If an expense exceeds a line item's expense cap, it cannot be added. Expenses can also be imported in *Administration>Actuals>Expenses*.

For more information on expenses, see the [AmpliFund Activity Management Guide]() or AmpliFund Administration Guide.

1. Open **Activity>Expenses**.
2. Click the **+ (Create Expense icon)** under *Actions*.



3. In the pop-up window, select a **Grant**.
4. Select a **Category**.
5. Select a **Line Item**.
6. Add the **Direct Cost** or **Salary amount**.
7. Check the **Exclude From Match** checkbox if necessary.
8. Select an **Expense Date**.
9. Select the **Expense Status**.
    - **New**: A new expense
    - **Matched**: The expense has been added manually and imported
    - **Reviewed**: The expense has been reviewed
    - **Payment Requested**: The expense has been invoiced to the funder

- **Paid**: The expense has been paid by the funder
- **Denied**: The expense has been denied by the funder

10. Select **Payee type** and **Payee,** or **Create New payee** and add **Payee name**. The payee is the entity that received the expense funds in exchange for services or goods.
11. Add a **Description** (optional).
12. Click **Save**.

How To Mark an Expense as Reviewed

Expenses may be marked as reviewed by Responsible Individuals, Grant Managers, and Organizational Administrators. This will change the expense status to Reviewed.

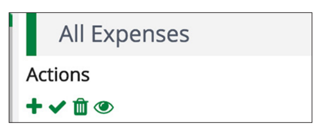
1. Open **Activity>Expenses**.

Filter By

2. Select a **Time Frame** to view.
3. Select a **Grant**, **Category**, and/or **Line Item** to view (optional).
4. Click **Run**.

All Expenses

5. Check the **checkbox** to the left of an expense.
6. Click the ✔ **(Mark as Reviewed icon)** below *Actions*.



7. In the confirmation pop-up window, click **Complete**.

Icons

- Create
- Edit
- Copy
- Delete
- Achievements
- Calendar

Achievements

Achievements are progress accomplished against planned grant programmatic goals. As you make progress against a goal, that goal's partial or whole completion may be marked at any time by adding an achievement. Depending on your account settings, there may be additional fields or sections in a *Custom tab*.

How To Add an Achievement

Prerequisite: Must be an Organizational Admin, Department Admin, Grant Manager, Additional Staff, or Responsible Individual

1. Open **Activity>Achievements**.
2. Click the **+ (Add Achievements icon)** next to an activity name.

Activity Name	Grant Name	Goal Type
Research topics for future seminars	Health Promotion and Disease Prevention Research	Narrative

3. In the pop-up window, select an **Achievement Date**.
4. Add an **achievement**. Depending on the goal type, the achievement might be a number, percentage, or completion.
5. Add **Notes** and **Attachments** (optional).
6. Click **Create**.

Icons

Print
Help
Create

Reporting Periods

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

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

How To Add a Reporting Period

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

How To Add an **Expenses** Reporting Period

From the *Expenses tab*, you can review expense details, view expense analytics, and select expenses to close out in the reporting period. The reporting period will include all reviewed expenses for the given time period.

Overall Expense Details

1. Add **Comments** (optional).
2. To attach documentation, click **Choose File** (optional).

Expenses Closeout

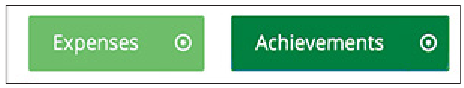
3. Select expense **category names** to close out. The Total Amount for the category includes any reviewed expenses for the period. To select all

expenses, check the **Select All checkbox**.

Note
You cannot add or edit expenses or achievements within a closed reporting period.

4. Click **Save** to save your progress, or **Close** to close the reporting period and submit it to the funding organization.

How To Add an **Achievements** Reporting Period



From the *Achievements tab*, you can review achievement details, view analytics, and select achievements to close out in the reporting period. The reporting period will include all achievements for the given time period.

Overall Achievements Details

1. Add **Comments** (optional).
2. To attach documentation, click **Choose File** (optional).

Achievements Closeout

3. In the *Achievements Closeout* section, select **goals** to close out. To select all goals, check the **Select All checkbox**.

Note
You cannot add or edit expenses or achievements within a closed reporting period.

4. Click **Save** to save your progress, or **Close** to close the reporting period and submit it to the funding organization.

How To Close a Reporting Period

1. Open **Activity>Reporting Periods>Open.**
2. Click a **grant name**.
3. Click a **reporting period start date**.

Note
You cannot add or edit expenses or achievements within a closed reporting period.

4. Click **Close** to close the reporting period and submit it to the funding organization.
5. In the confirmation pop-up window, click **Close**.

Icons

- Print
- Help
- Create/Add
- Edit
- Delete
- Export to PDF

Cash Flow

AmpliFund tracks money requested and received in the Cash Flow section of the Post-Award tab. Payment requests allow grant recipients to invoice grant funding organizations for expenses accrued (reimbursement) or anticipated (cash advance) during the life of the grant. Payment requests can be submitted directly to the funder for review and approval and recipients can create cash receipts to track received payments from the funder.

How To Add a Payment Request

Note

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

Payment requests can be created independently, or directly from closed tracking or reporting periods by clicking the **(Payment Request icon)** next to a period name on *Post-Award tab>Management>Tracking Periods* or *>Reporting Periods*.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Analytics tab**.
4. In the *Quick Create* section, click the **+ (Create icon)** next to *Payment Requests*.

Payment Request Information

5. Add a **Payment Request Name**.
6. Add **Date Created**.
7. Select **Related Tracking/Reporting Period(s)** to include (optional). The expenses in the closed period will populate the totals in the *Financial Detail* section.
8. Select **Payment Type.**
   - **Reimbursement:** Request payment for costs accrued
   - **Advance:** Request payment for anticipated expenses
9. Select a **Payment Request Status**.
   - **Not Submitted:** Payment request has not been submitted to the funder
   - **Submitted:** Payment request has been submitted to the funder
   - **Approved:** Payment request has been approved by the funder
   - **Rejected:** Payment request has been rejected by the funder

- **Paid:** Payment has been received

10. If payment request has been submitted, add **Date Submitted** (optional).

Costs/Expenses

11. Update **budget category totals** as necessary. These amounts pull from reviewed expenses in the closed tracking or reporting period.
12. In the *Additional Expenses* field, select a **Budget Category** and add e**xpense amount** (optional).

Contributions

13. Update **Match Contribution** (optional)

Totals

14. Add **Requested Amount**.
15. If payment request has been *Approved*, add the **Approved Amount**.

Details

16. Add **Comments** (optional). These will be visible to the funder.
17. Click **Choose a file** to add attachments (optional).
18. Click **Create** or **Submit** to send to the funder.

Note

Once the payment request is submitted, you can no longer edit the payment request.

Note

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

How To Add a Cash Receipts

Cash receipts allow grantees to track funder payments against payment requests, as well as other received payments. The funder organization will not have insight into a recipient's cash receipts. Cash receipts can be created from the *Post-Award tab>Cash Flow>Cash Receipts* or directly from the payment request.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Analytics tab**.
4. In the *Quick Create* section, click the **+ (Create icon)** next to *Cash Receipts*.
5. In the pop-up window, add **Receipt Name.**
6. Select a funding **Organization**. This defaults to the grant funder and pulls from *Contacts>Organizations*.
7. Select **Payment Date**.
8. Add payment **Amount**.
9. Select **Payment Method**.

10. Add **Payment Reference Number** (optional).
11. Select a **GL Account** . This list pulls from *Administration>Lists>GL Accounts*.
12. Select a **Relate Payment Request** (optional). This will link the cash receipt to a payment request.
13. Click **Choose a file** to attach a file from your computer (optional).
14. Add **Description** (optional).
15. Click **Create**.

Icons

- Print
- Help
- Save Current View
- Send Email
- Edit
- Add
- Remove
- Delete
- Calendar
- Activate
- Deactivate

Note

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

Amendments

Amendments allow funders and recipients to negotiate changes to an award. Recipients can propose amendments to the award amount, duration, budget categories, or program goals. Funders can review the proposed amendments and approve, deny, or request more information within AmpliFund. AmpliFund facilitates and tracks these interactions.

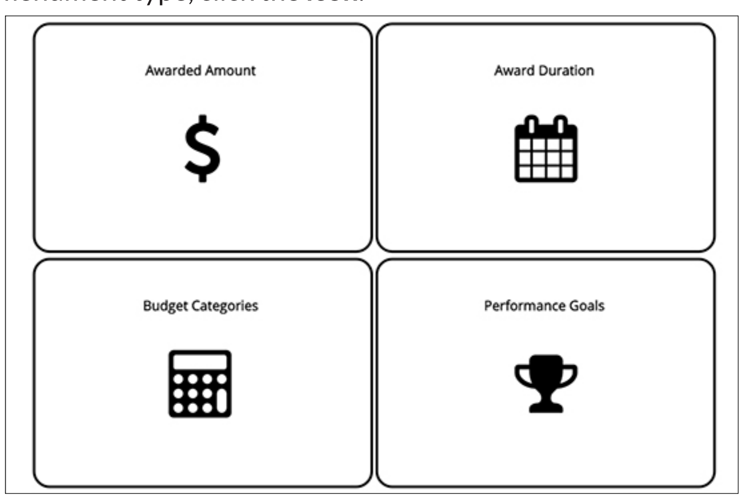
In addition, organizations can record amendments in AmpliFund if their corresponding recipient or funding organization is not in AmpliFund.

For more information on amendments, see the AmpliFund Amendment Guide for Grant Recipients.

How To Add an Amendment

Amendments can have as many as four parts: Awarded Amount, Award Duration, Category Budget, and Performance Goal.

1. Open **Grants Management>Grants**.
2. Click a **grant name**.
3. Open the **Analytics tab**.
4. Click the **+ (Add icon)** next to *Amendments.*
5. In the pop-up window, click on the **icons** of applicable amendment types to select. You can submit an amendment to change Awarded Amount, Award Duration, Budget Categories, and Performance Goals. To remove an amendment type, click the **icon**.



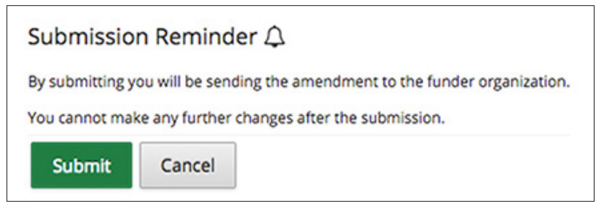
6. Click **Next**. The amendment types you have selected will appear as buttons at the top of the page. To remove an amendment type, click the

(Deactivate icon) on its tab. To add an amendment type, click the **(Activate icon)** on the grayed-out tab.

7. Enter the information for the selected amendment type.

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

8. Click **Save** to save your progress, or click **Submit** to send your completed amendment (including all selected amendment types) to the funding organization.



The funding organization may change the status to *Approved*, *Denied* or *Needs More Information*. They also have the option to edit the amendment before approving. You will receive an email notification when the funding organization has changed the status of the amendment.

How To Add an **Awarded Amount** Amendment Type

1. Click **Awarded Amount.** If the amendment type is not active, click the **(Activate icon)** to activate.

Amendment Request

Note
If your amendment includes multiple amendment types, the *Amendment Name* and *Date Requested/Approved* fields will be the same for each type.

2. Add the proposed **Amendment Name**.
3. In the *Date Requested/Approved* field, select the **date you will or have submitted the amendment**. If this field is left empty, the date the amendment is submitted through AmpliFund (i.e., the date the *Submit* button is clicked) will be recorded.

Awarded Amount

4. Add the **Proposed/Approved Total Awarded Amount**. The *Current Total Awarded Amount* is listed above this field for reference.
5. Add the **Justification** for your proposed amendment.
6. To *Attach Documentation*, click **Choose File** and select a file from your

computer.

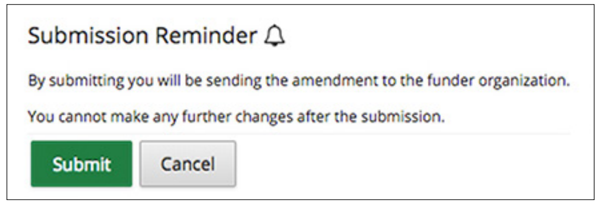
7. Add any **Internal Notes** about the amendment for you or your staff to view.
8. Click **Save** to save your progress or click **Submit** to send your completed amendment (including all selected amendment types) to the funding organization.

Note

Anything added to the *Internal Notes* field will not be visible to the funder when the amendment response is submitted.

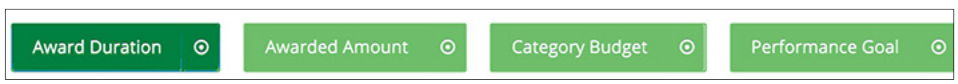
Warning

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



How To Add an **Award Duration** Amendment Type

1. Click **Award Duration**. If the amendment type is not active, click the ◯ **(Activate icon)** to activate.



Amendment Request

Note

If your amendment includes multiple amendment types, the *Amendment Name* and *Date Requested/Approved* fields will be the same for each type.

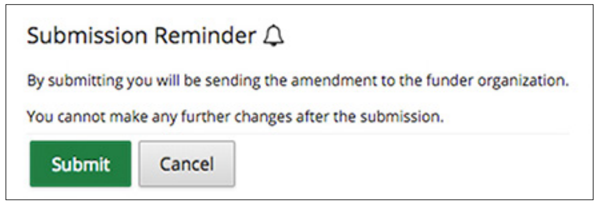
2. Add the proposed **Amendment Name.**
3. In the *Date Requested/Approved* field, select the **date you will or have submitted the amendment**. If this field is left empty, the date the amendment is submitted through AmpliFund (i.e., the date the *Submit* button is clicked) will be recorded.
4. Add the **Proposed/Approved Length of Award** in years and months. The *Current Length of Award* is listed above this field for reference.
5. Update the **(Approved) Close Out Date** as necessary.
6. Add the **Justification** for your proposed amendment.
7. To *Attach Documentation*, click **Choose a file** to select a file from your computer.
8. Add any **Internal Notes** about the amendment for you or your staff to view.
9. Click **Save** to save your progress, or click **Submit** to send your completed amendment (including all selected amendment types) to the funding organization.

Note

Anything added to the *Internal Notes* field will not be visible to the funder when the amendment response is submitted.

Warning

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



How To Add a **Category Budget** Amendment Type

1. Click **Category Budget**. If the amendment type is not active, click the ○ **(Activate icon)** to activate.

Amendment Request

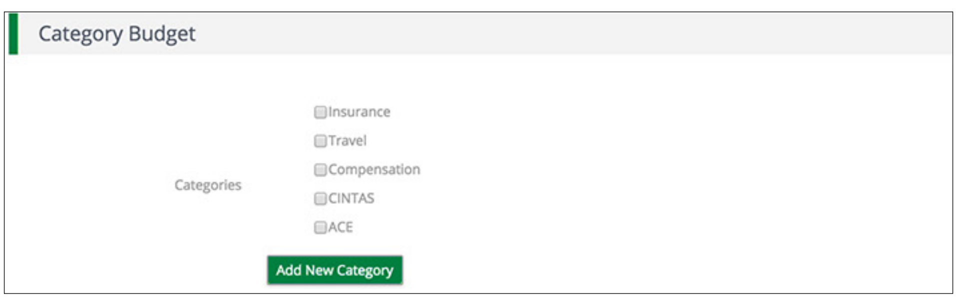
Note

If your amendment includes multiple amendment types, the *Amendment Name* and *Date Requested/Approved* fields will be the same for each type.

2. Add the proposed **Amendment Name**.
3. In the *Date Requested/Approved* field, select the **date you will or have submitted the amendment**. If this field is left empty, the date the amendment is submitted through AmpliFund (i.e., the date the *Submit* button is clicked) will be recorded.

Category Budget

4. Select all applicable categories. If a category is not available, you can add it by clicking **Add New Category.** The *Category Name* and *Proposed Budgeted Category Total* fields will appear in the *Budget Categories* section below.



Budget Categories

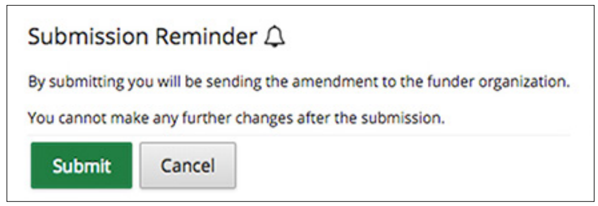
5. Add the **proposed budget amount by category** in the respective *Proposed Budgeted Category Total* field(s). The current and actuals amount per category is listed above each field for reference. If you have added a new category, you can enter the new category in the *Name Category* field.
6. Add the **Justification** for your proposed amendment.

7. To *Attach Documentation*, click **Choose a file** to select a file from your computer.

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

8. Add any *Internal Notes* about the amendment for you or your staff to view.
9. Click **Save** to save your progress, or click **Submit** to send your completed amendment (including all selected amendment types) to the funding organization.

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



How To Add a **Performance Goal** Amendment Type

1. Click **Performance Goal**. If the Amendment Type is not active, click the ◯ **(Activate icon)** to activate.

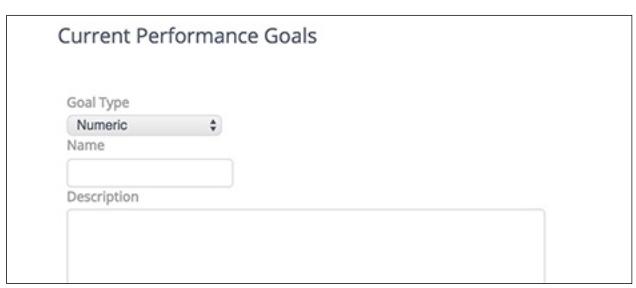
Amendment Request

Note
If your amendment includes multiple amendment types, the *Amendment Name* and *Date Requested/Approved* fields will be the same for each type.

2. In the *Amendment Name* field, enter a **name** for your proposed amendment.
3. In the *Date Requested/Approved* field, select the **date you will or have submitted the amendment**. If this field is left empty, the date the amendment is submitted through AmpliFund (i.e., the date the **Submit** button is clicked) will be recorded.

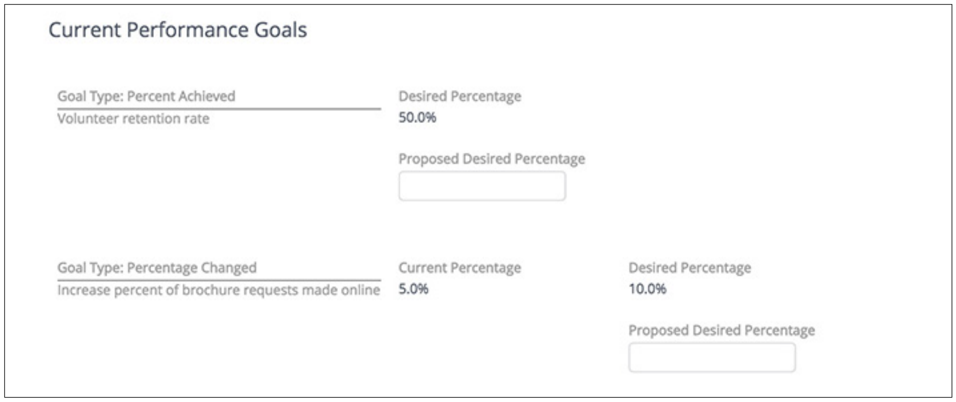
Performance Plan Goal

4. Select all applicable **goals**. If a goal is not available, you can add it by clicking **Add New Goal**. A *Goal Type* field will appear in the *Current Performance Plan Goals* section below.



Current Performance Plan Goals

5. Add the proposed **goal(s)** in the respective *Goal Type* field(s). The current goal is listed above each field for reference. If you have added a new goal, you can enter the new **category** in the *Goal Type* field.



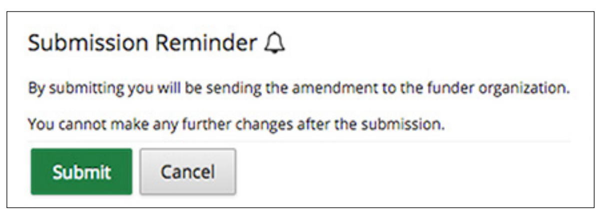
6. In the *Request/Justification* field, add the **reason or justification** for your proposed amendment.
7. To *Attach Documentation*, click **Choose a file** to select a file from your computer.
8. In the *Internal Notes* field, add any **notes** about the amendment for you or your staff to view.
9. Click **Save** to save your progress, or click **Submit** to send your completed amendment (including all selected Amendment Types) to the funding organization. Click **Cancel** to close amendment without saving any changes.

Note

Anything added to the *Internal Notes* field will not be visible to the funder when the amendment response is submitted.

Warning

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



Appendix

Amendments FAQs

Who can add budget line items?

If the funding organization allows it, the Grant Manager and Organizational Admin can add budget line items.

Who can add expenses?

If the funding organization allows it, Grant Manager, and Organizational Admin can add expenses.

Who can add goals?

f the funding organization allows it, the Grant Manager and Organizational Admin can add goals.

Who can add achievements?

If the funding organization allows it, Grant Manager, and Organizational Admin can add achievements.

What if a funding organization changes an amendment status to Needs More Information?

If the funding organization changes the status to Needs More Information, you will have to add a new Amendment with the requested information and resubmit.

Can I track a new amendment of a received grant if the funding organization is not in AmpliFund?

No, there is no way to track the status of a new amendment if the funding organization is not in AmpliFund. You can only add approved amendments as a record.

Goal Types

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

Milestone Goals 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 Goals 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 Goals 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 Goals 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 Goals 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 Goals 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.

Security Roles

Add-on modules are indicated with an asterisk (*). For more information on each security role's access, see the [AmpliFund Security Role Matrix Guide].

Organizational Administrators

Organizational Admin have the highest level of security and can create, view, and edit all records in the account, including Staff compensation information. Organizational Admin are the only users that can create, view, and edit records in the *Administration* module. The *Administration* module includes License Information, Account Settings, Lead and Sub-Recipients* management, Workflow* management, System Security and user management, and Lists and Actuals management and import. There is no limit to the number of Organizational Admin you can have per account.

Executives

Executives can view all records in the account, including Staff compensation information, but cannot add or edit any records. Executive users can also view the License Information section in the *Administration* module.

Department Administrators

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

Department Users

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

Project Administrators

Project Admin can create, view, and edit all project* records. In addition, Project Administrators can view all grants related to their projects.

Project Users

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

Fund Administrators

Fund Admin can create, view, and edit all fund*, opportunity*, and award* records.

Fund Users

Fund Users can view and edit any assigned fund* records. Fund Users can create new fund records. They can also create, view, and edit all opportunity* and award* records. Fund Users are classified as Salary or No Salary. If assigned to a grant, Fund Users (No Salary) cannot create, view, or edit personnel line items on a grant's budget.

*Add-on module

Researcher Researchers only have access to the *Research** module. Researchers cannot apply for or manage grants.

Implicit Security Roles

If users are designated as a record's manager (i.e. Grant Managers, Project Managers, or Fund Managers), they will have additional security privileges on those records. They will be able to view all calendar items related to the record, and view and edit the record. (No Salary) users will still not be able to see the personnel line items.

*Add-on module