

AmpliFund Calculations Guide

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

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Activity

Events

Field/Date	Calculation/Source	Additional Information
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

Field/Date	Calculation/Source	Additional Information
Cash Match	= Percentage Cash Match x Direct Cost	
In Kind	= Percentage In-Kind Match x Direct Cost	
Total Budgeted	Sum of direct cost of all line items on grant budget	
Total Expensed	Sum of Direct Cost of all expenses against line item	
Total Remaining	= Total Budgeted - Total Expensed	

Program Income

Field/Date	Calculation/Source	Additional Information
Income Unexpended for the Period	= Income Earned for the Period - Income Expended	
Total Earned for the Period GYTD	Current sum of all income earned for the grant year	
Total Expended for Deduction Alternative GYTD	Current sum of all income spent for the grant year	

Total Unexpended for the Period GYTD	Current net sum of all income for the grant year	
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Reporting Periods

Field/Date	Calculation/Source	Additional Information
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	Sum of all grant-funded expenses for period	
Actual Match	Sum of all 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	
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	Sum of all expenses that have been reviewed before period end date	
Total Awarded Amount	Sum of all Funding Sources	
Total Expense Amount To Date	Sum 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

Field/Date	Calculation/Source	Additional Information
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.

Timesheets

Field/Date	Calculation/Source	Additional Information
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

Field/Date	Calculation/Source	Additional Information
Due Dates	Grant Details	Due dates for Tracking Periods are set in the grant's <i>Post-Award tab>Settings>Grant Settings</i> .

Field/Date	Calculation/Source	Additional Information
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	Sum of all grant-funded expenses for period	
Actual Match	Sum of all 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	
Number of Categories Over Budget	Number of budget categories with expenses over the budget with a variance of more than 10% for the period	

Field/Date	Calculation/Source	Additional Information
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	Sum of all expenses that have been reviewed before period end date	
Total Awarded Amount	Sum of all Funding Sources	
Total Expense Amount To Date	Sum 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	Sum of all program income for grant	
Total Expended To Date	Sum of all program income expended	
Total Unexpended To Date	= Total Earned to Date - Total Expended to Date	

Award Management

Award Details

Field/Date	Calculation/Source	Additional Information
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	Sum of all funding sources	

Opportunity Details

Field/Date	Calculation/Source	Additional Information
Total Program Funding	Sum of all Commitments	This information pulls from a fund record's <i>Fund Management tab</i> >Commitments.

Opportunity Scorecard

Field/Date	Calculation/Source	Additional Information
Application form score	= Sum of all submitted scores for form / number of reviewers that submitted scores for form	
Average Total Score	= Sum of all submitted scores / number of reviewers that submitted scores	

Contacts

Staff Compensation

Field/Date	Calculation/Source	Additional Information
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

Amendments

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

Budget

Field/Date	Calculation/Source	Additional Information
Category Subtotal	Sum 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	Sum of all program income recorded in tracking or reporting periods	
Total Expense Budget Cost	Sum of all categorized and uncategorized line items in the expense budget	
Total Overall Budget Cost	= Total Expense Budget Cost - Total Revenue	
Total Revenue	Sum 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.
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

Field/Date	Calculation/Source	Additional Information
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.
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

Field/Date	Calculation/Source	Additional Information
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

Field/Date	Calculation/Source	Additional Information
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>
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

Field/Date	Calculation/Source	Additional Information
Total Amount Approved	Total Amount Approved on payment request	This information pulls from <i>Post-Award tab >Cash Flow>Payment Requests.</i>

Payment Requests

Field/Date	Calculation/Source	Additional Information
Match Contribution	Sum of all 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.
Program Income	Sum 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

Field/Date	Calculation/Source	Additional Information
Length of Award	Years, months, and days from the Start Date to End Date or Extended Date	

Fund Management

Award Details

Field/Date	Calculation/Source	Additional Information
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	Sum of all funding sources	This information pulls from a fund record's <i>Fund Management tab>Awards</i> .

Fund Details

Field/Date	Calculation/Source	Additional Information
Total Funding Committed	Sum of all Commitments	This information pulls from <i>Fund Management tab>Commitments</i> .
Total Income Received	Sum of all Income	This information pulls from <i>Fund Management tab>Income</i> .
Total Disbursements	Sum of all 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	= Sum of all Awards - Total Disbursements	This information pulls from <i>Fund Management tab>Awards</i> .
Available Funds	= Current Fund Cash Balance - Outstanding Obligations	
Pending Opportunities	Sum of all Opportunities not yet awarded	This information pulls from <i>Fund Management tab>Opportunities</i> .

Opportunity Details

Field/Date	Calculation/Source	Additional Information
Total Program Funding	Sum of Commitments	This information pulls from a fund record's <i>Fund Management tab</i> >Commitments.
Opportunity Scorecard		
Application form score	= Sum of all submitted scores for form / number of reviewers that submitted scores for form	
Average Total Score	= Sum of all submitted scores / number of reviewers that submitted scores	

Reports

Fund and Opportunity

Field/Date	Calculation/Source	Additional Information
Opportunity Funding Report		
Awarded Amount	Sum of awarded amounts for all awards	
Total Actual	Sum of direct cost from award expenses (that have not been rejected)	
Total Award	= Awarded Amount - Cash Match	
Total Remaining	= Total Award - Total Actual	
Sub-Award Funding Report		
Awarded Amount	Sum of awarded amounts for all sub-awards	
Total Actual	Sum of direct cost from sub-award expenses (that have not been rejected)	
Total Award	= Awarded Amount - Cash Match	
Total Remaining	= Total Award - Total Actual	

Post-Award

Field/Date	Calculation/Source	Additional Information
Grant Budget Variance Report		
Budget Variance	= Total Actual - Total Budgeted	
Cash Match	Sum of budgeted cash match allocations from line items with end date within date range	
Grant Funded	Sum of budgeted grant-funded allocations from line items with end date within date range	
In-Kind	Sum of budgeted in-kind match allocations from line items with end date within date range	

Spend Down	= Total Actual / Total Budgeted	
Total Actual	Sum of direct cost from expenses with expense date that falls within date range	All new, paid, payment requested, and reviewed expense statuses are included by default
Total Budgeted	Sum of budgeted direct cost from line items with end date within date range	
Grant Expense Detail Report		
Amount	Expense Direct Cost	
Post-Award Status Report		
Total Actual	Sum of Direct Cost of expenses	All new, paid, payment requested, and reviewed expense statuses are included by default
Total Award	= Awarded Amount + Cash Match	
Total Remaining	= Total Award - Total Actual	

Recipient

Field/Date	Calculation/Source	Additional Information
Recipient Expense Detail Report		
Amount	Expense Direct Cost	
Recipient Grant Budget Variance Report		
Budget Variance	= Total Actual - Total Budgeted	
Cash Match	Sum of budgeted cash match allocations from line items with end date within date range	
Grant Funded	Sum of budgeted grant-funded allocations from line items with end date within date range	
In-Kind	Sum of budgeted in-kind match allocations from line items with end date within date range	
Spend Down	= Total Actual / Total Budgeted	
Total Actual	Sum of direct cost from expenses with expense date that falls within date range	Expenses that have not been rejected

Field/Date	Calculation/Source	Additional Information
Total Budgeted	Sum of budgeted direct cost from line items with end date within date range	
Sub-Recipient Expense Detail Report		
Amount	Sum of direct cost for all sub-award expenses (that have not been rejected)	
Sub-Recipient Grant Budget Variance Report		
Budget Variance	= Total Actual - Total Budgeted	
Cash Match	Sum of budgeted cash match allocations from line items with end date within date range	
In-Kind Match	Sum of budgeted in-kind match allocations from line items with end date within date range	
Grant Funded	Sum of budgeted grant-funded allocations from line items with end date within date range	
Spend Down	= Total Actual / Total Budgeted	
Total Actual	Sum of direct cost from expenses with expense date that falls within date range	All new, paid, payment requested, and reviewed expense statuses are included by default
Total Budgeted	Sum of budgeted direct cost from line items with end date within date range	