

AmpliFund



Grant Maker Pre-Award Core Series

Reviewer Fields and Application Testing

Grant Maker Pre-Award Core Series

- **Training 1:** AmpliFund & Illinois System Integrations
- **Training 2:** Pre-Award – Master Data, Fund, Opportunity
- **Training 3:** Pre-Award – Application Configuration
- ➔ • **Training 4:** Pre-Award – Scoring/Reviewer Field Set-up & Application Testing
- **Training 5:** Pre-Award – Application Review Workflow Configuration & Testing

Agenda

- Reviewer Only Fields
- Scoring Questions
- Considerations
- Submit Test Applications
- In-Product Demo
- Next Steps
- Customer Support
- Question & Answer

Review Only Fields

Add Reviewer Only Fileds

- Complete the following steps from the Form Template or Application Form to add Reviewer Only Fileds.
- Add a Section or a Field and check the Reviewer only Checkbox.

The image shows a screenshot of the AmpliFund form builder interface. It is divided into two main sections: a 'Name Section' and a 'Name Field' configuration.

Name Section:

- Contains a text input field.
- Has a checkbox labeled 'Visible to Reviewer Only' which is currently unchecked.
- Below the checkbox is a button labeled '+ Field'.
- At the bottom of the section are two buttons: '+ Section' and '+ Field'.

Name Field:

- Contains a text input field.
- Has two checkboxes: 'Conditional field' (unchecked) and 'Score Field' (unchecked).
- Has a checked checkbox labeled 'Visible to reviewer only'.
- Below the checkboxes is a dropdown menu with the text 'Text Label' and a downward arrow.
- At the bottom of the field configuration are two buttons: '+ Section' and '+ Field'.

Scoring Questions

Add Scoring to a Field

- Complete the following steps from the Form Template or Application Form to add Reviewer Only Fields.
- Best practice is to check the Reviewer Only checkbox when adding a Scoring Field.
- Check the Score Field checkbox.
- Select the Field Score Category.
- Configure the Field Score Scale.

Name Field

Conditional field
 Score Field

Field Scoring Category

Select Scoring Category This field is required.

Field Score Scale*

1 to 25

Visible to reviewer only

Text Label

+ Section + Field

Name Field

Conditional field
 Score Field

Field Scoring Category

Select Scoring Category This field is required.

- Default
- Community Development
- Community Need
- Sustainability
- Timebound

Considerations

Application Setting Considerations

- Ensure your Application Settings are configured correctly.
 - Form Settings.
 - Scoring Information.

Form Settings

Default Score Scale

1 to 25

Scoring Categories

+

- Default
- Community Development  
- Community Need  
- Sustainability  

Scoring Information

Ignore Score Outliers	No	▼
Reviewer Scorecard Visibility	Reviewer Only	▼
Show Budget Details	Yes	▼
Allow Edits After Submission	No	▼
Multiple Scoring Rounds	No	▼

Test Application Considerations

- Ensure your Opportunity Details, Budget Template, Performance Plan Template, and Application Forms are configured before testing.
- Update the Submission Information section of the Opportunity Details page before testing.
 - Specifically, the Submission Open and Close Dates.
 - Must update before publishing.

Submission Information

Submission Timeline Type	One-Time	<input checked="" type="checkbox"/> Make Viewable to Applicants
Submission Open Date	6/10/2024 12:00 AM	<input checked="" type="checkbox"/> Make Viewable to Applicants
Submission Close Date	6/15/2024 12:00 AM	<input checked="" type="checkbox"/> Make Viewable to Applicants

Submit Test Application

Submit Test Application

- You cannot edit Application Forms after an Application has been submitted. This includes Test Applications.
- You must delete the testing data after submitting a Test Application if updates to the Application Forms are required.
- From the Opportunity Details page, click on the Public Link.
- You will land on the Opportunity Details in the Applicant Portal and be able to see what your Applicants see when applying.

Agency Opportunity Number

Assistance Listings Number 81.254

Public Link <https://il.amplifund.com/Public/Opportunities/Details/343b0bc6-e2f2-4b9f-8db5-40cd76b4287b>

Is Published No [Delete Testing Data](#)

Applicant Portal – Opportunity Details

- Review the Opportunity Details Page.



Thomas Colgrove ◀
Illinois Finance Authority

Federal Formula Grant Funding: Section 40101(d) – Preventing Outages and Enhancing the Resilience of the Electric Grid

Print Help Download Save Apply

Opportunity Details
Evaluation & Scoring

Opportunity Information

CSFA Number	560-00-3393
CSFA Popular Name	40101(d) Grid Resilience
Title	Federal Formula Grant Funding: Section 40101(d) – Preventing Outages and Enhancing the Resilience of the Electric Grid
Description	NOFO Purpose: Illinois Finance Authority (IFA), in its capacity as the Illinois Climate Bank (CB), invites project proposals under Illinois' award for the 40101(d) Federal Formula Grant Program: Preventing Outages and Enhancing the Resilience of the Electric Grid (Program). With this NOFO, IFA/CB invites eligible entities interested in applying for funding under this program to file their pre-application proposals in compliance with the terms of this NOFO.
	IFA/CB reserves the right to revise any part of this NOFO by issuing addendum(s) at any time. Issuance of

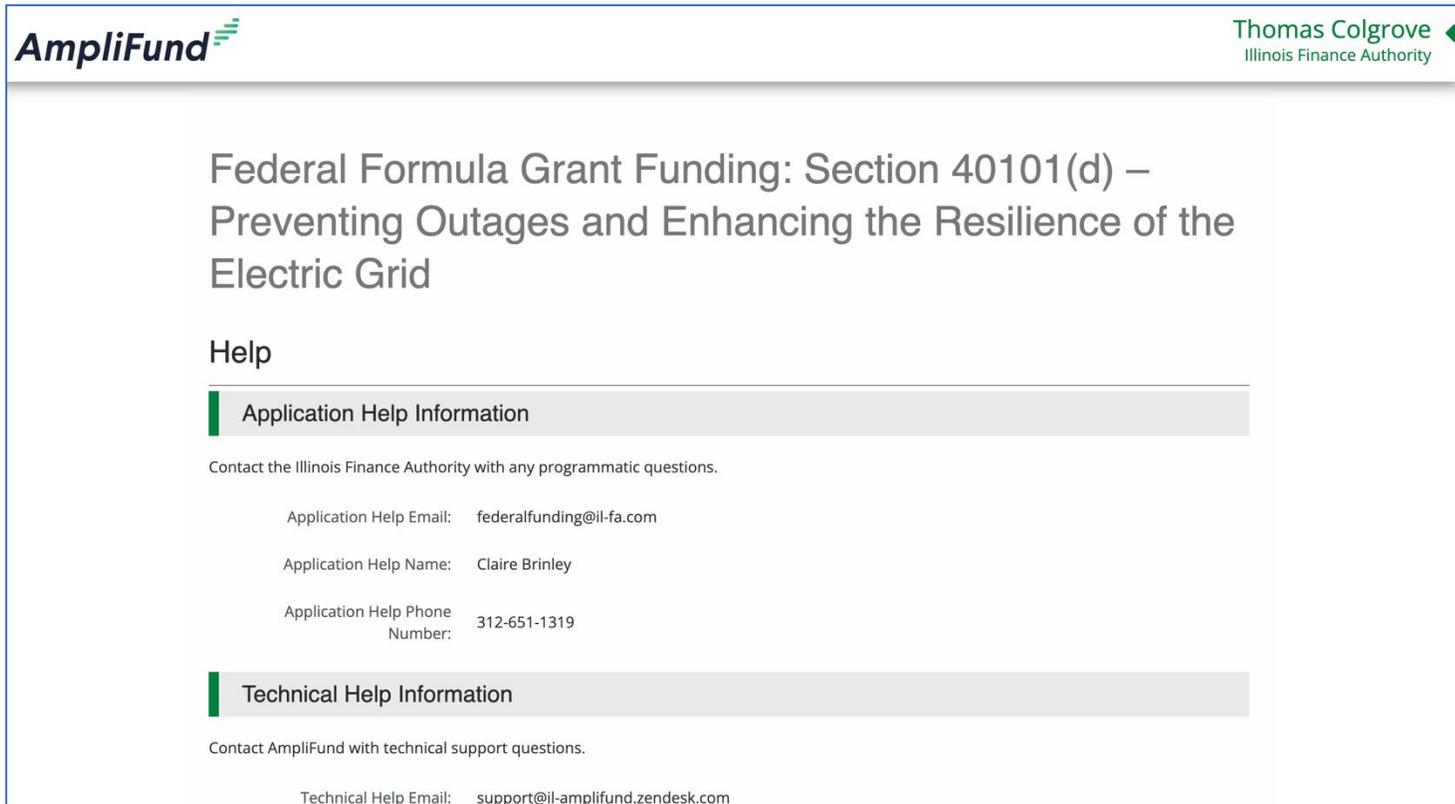
Applicant Portal – Evaluation and Scoring

- Click on the Evaluation and Scoring tab to review the Application Settings – Evaluation and Scoring information referenced earlier.

The screenshot displays the AmpliFund Applicant Portal interface. At the top left is the AmpliFund logo, and at the top right is the user name "Thomas Colgrove" and "Illinois Finance Authority". The main heading is "Federal Formula Grant Funding: Section 40101(d) – Preventing Outages and Enhancing the Resilience of the Electric Grid". Below the heading are five green buttons: "Print", "Help", "Download", "Save", and "Apply". A horizontal tab bar contains two tabs: "Opportunity Details" and "Evaluation & Scoring", with the latter being selected and highlighted. Below the tabs are three sections: "Criteria", "Review and Selection Process", and "Review and Selection Criteria". The "Criteria" section contains the text "NA". The "Review and Selection Process" section is currently empty. The "Review and Selection Criteria" section contains the text "Minimum Requirements: To be eligible for funding, the proposed project at a minimum must comply with the US DOE minimum requirements and must:" followed by a list of three items: "a) Result in Community Benefits (as discussed further below);", "b) Be located in Illinois; and", and "c) Include required Cost Match." At the bottom left of the screenshot is the URL: <https://il.amplifund.com/Public/Opportunities/Details/343b0bc6-e2f2-4b9f-8db5-40cd76b4287b#evalScoring>

Applicant Portal – Help

- Click on the Help tab to review the Application Settings – Applicant Portal Settings.
- Click the back button on your browser to get back to the previous page.



The screenshot shows the AmpliFund Applicant Portal interface. At the top left is the AmpliFund logo. At the top right, the user's name "Thomas Colgrove" and affiliation "Illinois Finance Authority" are displayed with a left-pointing arrow. The main content area features a heading "Federal Formula Grant Funding: Section 40101(d) – Preventing Outages and Enhancing the Resilience of the Electric Grid". Below this is a "Help" section with two sub-sections: "Application Help Information" and "Technical Help Information".

AmpliFund Thomas Colgrove
Illinois Finance Authority

Federal Formula Grant Funding: Section 40101(d) – Preventing Outages and Enhancing the Resilience of the Electric Grid

Help

Application Help Information

Contact the Illinois Finance Authority with any programmatic questions.

Application Help Email: federalfunding@il-fa.com

Application Help Name: Claire Brinley

Application Help Phone Number: 312-651-1319

Technical Help Information

Contact AmpliFund with technical support questions.

Technical Help Email: support@il-amplifund.zendesk.com

Applicant Portal – Apply

- From the Opportunity Details page, click on the Apply button.



Thomas Colgrove
Illinois Finance Authority

Federal Formula Grant Funding: Section 40101(d) – Preventing Outages and Enhancing the Resilience of the Electric Grid

[Print](#)
[Help](#)
[Download](#)
[Save](#)
[Apply](#)

[Opportunity Details](#)
[Evaluation & Scoring](#)

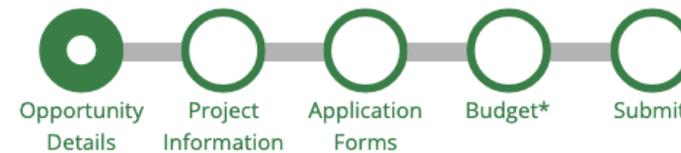
Opportunity Information

CSFA Number	560-00-3393
CSFA Popular Name	40101(d) Grid Resilience
Title	Federal Formula Grant Funding: Section 40101(d) – Preventing Outages and Enhancing the Resilience of the Electric Grid
Description	NOFO Purpose: Illinois Finance Authority (IFA), in its capacity as the Illinois Climate Bank (CB), invites project proposals under Illinois' award for the 40101(d) Federal Formula Grant Program: Preventing Outages and Enhancing the Resilience of the Electric Grid (Program). With this NOFO, IFA/CB invites eligible entities interested in applying for funding under this program to file their pre-application proposals in compliance with the terms of this NOFO.

Applicant Portal – Navigation Timeline

- Navigation Timeline – Think of each navigation sections as a phase or bucket of the application process. First review the Opportunity Details, complete the Project Information, Application Forms, Performance Plan, Budget, Etc.

FY25 Illinois Voter Registration System Grant (IVRS)



Applicant Portal – Download the Application Packet

- Click Download to download the Application Packet.

Project Information

[Help](#) [Download](#) [Save](#) [Save & Continue](#)

Download Application

Application Information

Application Name *

Pre-Qualification Status Not Qualified

Applicant Portal – Save, Mark as Complete, Save and Continue

- At the bottom of each page there will be an option to Save, Mark as Complete, and Save and Continue.
 - Save – Saves progress.
 - Mark as Complete – Mark the object as complete. All required fields must be complete.
 - Save and Continue – Saves and automatically takes you to the next step.
- All navigation sections must be marked as complete before Submitting.

A dark green rounded rectangular button with the text "Save" in white.A light green rounded rectangular button with a white checkmark icon and the text "Mark as Complete" in white.A dark green rounded rectangular button with the text "Save & Continue" in white.

Project Information – Application Information

- Any field with an * is required.
- Enter Application Name.
- Enter Award Requested.

Application Information

Application Name *	<input style="width: 60%;" type="text"/>
Pre-Qualification Status	Not Qualified
How much are you requesting from the funder?	
Award Requested *	<input style="width: 60%;" type="text" value="\$0.00"/>
How much are you planning to contribute to the budget?	
Cash Match Requirement	\$0.00 ⓘ
Cash Match Contributions *	<input style="width: 60%;" type="text" value="\$0.00"/>
In-Kind Match Requirement	\$0.00 ⓘ
In-Kind Match Contributions *	<input style="width: 60%;" type="text" value="\$0.00"/>
Other Funding Requirement	\$0.00 ⓘ
Other Funding Contributions *	<input style="width: 60%;" type="text" value="\$0.00"/>
Total Award Budget	\$0.00

Project Information – Application Forms

- Any field with an * is required.
- Complete all required questions.
- Mark as Complete and Save and Continue.

Primary Contact Information

Name *	<input type="text" value="Tommy Tester"/>
Email Address *	<input type="text" value="test@test.com"/>
Address Line 1 *	<input type="text" value="Test Drive 123"/>
Address Line 2	<input type="text"/>
City *	<input type="text" value="Test City"/>
State/Province *	<input type="text" value="IL"/>
Postal Code *	<input type="text" value="00000"/>
Phone Number	<input type="text" value="0000000000"/>

Application Forms Grid

- Review the Name, Status, and Print fields.
- Click on the name to start the Application Form.
- The three available status options are New, In-Progress, and Complete.
- Click the printer icon to print the Application Form.



Opportunity Details Evaluation & Scoring Project Information Application Forms (2) Submit

Forms

Help
Download
Save & Continue

Name	Status	Print
How to Apply	New	
Project Narrative	New	

K
<
1
>
»

25 ▾

1 - 2 of 2 items

Save & Continue

Complete Application Forms

- Complete all required fields (marked with and *).
- Mark as Complete and Save and Continue.
- Repeat for all Application Forms.

How to Apply

1 of 2

[Download](#) [Save](#) [Save & Continue](#)

Instructions and Resources

Add instructions here...

Download the How to Apply PDF here.
[Map of EIECs and DACs in Illinois.pdf](#)

Access the How to Apply Video here.
[Test.com](#)

Applicant Certification

Certify that you have reviewed the How to Apply resources above. *

Yes

[Save](#) [✔ Mark as Complete](#) [Save & Continue](#)

Complete Budget

- The Budget must account for the Award Requested on the Project Information Page. The Budget cannot be under or over the Award Requested Amount.

FY25 Illinois Voter Registration System Grant (IVRS)

✓ Opportunity Details
○ Project Information
○ Application Forms
○ Budget*
○ Submit

Project Information ✓ Help Download

Application Information

Application Name * ✓

Pre-Qualification Status Not Qualified

How much are you requesting from the funder?

Award Requested *

Options

Line Items Non-Grant Funded

Proposed Budget

Expense Budget

Category	Grant Funded	Non-Grant Funded	Total Budgeted
+ IVRS - Annual Registration License/Maintenance Fees	\$0.00	\$0.00	\$0.00
+ IVRS - Election Security	\$0.00	\$0.00	\$0.00
+ IVRS - ICN Connection Costs	\$0.00	\$0.00	\$0.00
+ IVRS - Implantation of New VR Software (Including Training)	\$0.00	\$0.00	\$0.00
+ IVRS - Voter Purge	\$0.00	\$0.00	\$0.00
Total Expense Budget Cost	\$0.00	\$0.00	\$0.00

Revenue Budget

Category	Grant Funded	Non-Grant Funded	Total Budgeted
Grant Funding			
Award Requested	\$100,000.00		\$100,000.00
Subtotal	\$100,000.00		\$100,000.00
Non-Grant Funding			
Cash Match		\$0.00	\$0.00
In-Kind Match		\$0.00	\$0.00
Other Funding		\$0.00	\$0.00
Subtotal		\$0.00	\$0.00
Total Revenue Budget Cost			(\$100,000.00)
Total Overall Budget Cost			(\$100,000.00)

The Total Overall Budget Cost must be \$0.00

✓ Mark as Complete
Save & Continue

Enter Line Items

- Click on the + Icon next to the appropriate Budget Category.
- Enter Name.
- Enter Description.
- Enter Direct Cost.
- Enter Narrative.
- Add Attachments (Optional).
- Click Create on the bottom right of the screen.
- Repeat for all Line Items.

Proposed Budget			
Expense Budget			
Category	Grant Funded	Non-Grant Funded	Total Budgeted
 IVRS - Annual Registration License/Maintenance Fees	\$0.00	\$0.00	\$0.00
 Election Security	\$0.00	\$0.00	\$0.00
 IVRS - ICN Connection Costs	\$0.00	\$0.00	\$0.00
 IVRS - Implantation of New VR Software (Including Training)	\$0.00	\$0.00	\$0.00
 IVRS - Voter Purge	\$0.00	\$0.00	\$0.00
Total Expense Budget Cost	\$0.00	\$0.00	\$0.00

New Line Item

Budget Item Information

Category IVRS - Annual Registration License/Maintenance Fees ▼

Item Type Non-Personnel ▼

Name *

Description *

Direct Cost *

Total Budgeted \$0.00

Narrative *

Attachments

Edit Line Items

- Click on the pencil edit icon to edit an existing Line Item.

Proposed Budget				
Expense Budget				
Category		Grant Funded	Non-Grant Funded	Total Budgeted
+ IVRS - Annual Registration License/Maintenance Fees		\$100,000.00	\$0.00	\$100,000.00
Test	 	\$100,000.00	\$0.00	\$100,000.00
+ IVRS - Election Security		\$0.00	\$0.00	\$0.00
+ IVRS - ICN Connection Costs		\$0.00	\$0.00	\$0.00
+ IVRS - Implantation of New VR Software (Including Training)		\$0.00	\$0.00	\$0.00
+ IVRS - Voter Purge		\$0.00	\$0.00	\$0.00
Total Expense Budget Cost		\$100,000.00	\$0.00	\$100,000.00
Revenue Budget				

Complete Budget

- The Total Overall Budget Cost should be \$0.00.
- Mark as Complete.
- Save and Continue.

Revenue Budget		
Grant Funding		
Award Requested	\$100,000.00	\$100,000.00
Subtotal	\$100,000.00	\$100,000.00
Non-Grant Funding		
Cash Match	\$0.00	\$0.00
In-Kind Match	\$0.00	\$0.00
Other Funding	\$0.00	\$0.00
Subtotal	\$0.00	\$0.00
Total Revenue Budget Cost		(\$100,000.00)
Total Overall Budget Cost		\$0.00

✓ Mark as Complete

Save & Continue

Enter Performance Plan Goals

- If the Performance Plan is required or optional complete the following steps to enter Performance Plan data.
- Click on the + Add Goal icon to add a new goal in that section.

Performance Plan

Proposed Performance Plan

Test Milestone* + Add Goal
Instructions for applican [Add Goal](#)
No items for strategy

Test Narrative* + Add Goal
Instructions for applicants.
No items for strategy

Test Numeric* + Add Goal
Instructions for applicants.
No items for strategy

Enter Performance Plan Goals

- Select Goal Type.
- Enter Name.
- Enter Description.
- Enter the Responsible Party.
- Enter the Start Date.
- Enter the Target Date.
- Complete the required information marked with an *
- Select Required (R) or Inform Only (IO).
- Click Create on the bottom right of the screen.

The screenshot shows a 'New Goal' form with the following fields and values:

- Goal Type ***: Milestone (dropdown menu)
- Strategy**: Test Milestone*
- Strategy Description**: Instructions for applicants.
- Name ***: (empty text input)
- Description ***: (empty text area)
- Responsible Party ***: (empty text input)
- Start Date ***: MM/DD/YYYY (calendar icon)
- Target Date ***: MM/DD/YYYY (calendar icon)
- Required (R) or Inform Only (IO) ***: (dropdown menu)

Buttons: Create (green), Cancel (grey)

Complete Performance Plan

- Add all required Performance Plan Goals.
- Mark as Complete.
- Save and Continue.

Performance Plan ✓ Help Download Save & Continue

Proposed Performance Plan

Test Milestone* + Add Goal
Instructions for applicants.

Milestone: Test ✎ 🗑️
Test

Test Narrative* + Add Goal
Instructions for applicants.

Narrative: Test ✎ 🗑️
Test

Test Numeric* + Add Goal
Instructions for applicants.

Numeric: Test ✎ 🗑️
Test

Mark as In Progress Save & Continue

Applicant Portal – Submit Application

- All navigation sections across the top must be marked as complete.
- Green circles with white checkmarks indicate the navigation sections has been marked as complete.
- If everything is good click Submit.



You are about to submit your application, **Test App**, to **Nebraska Department of Economic Development**.

Take the time to review your application by using the timeline above. You can select any section and jump to that page.

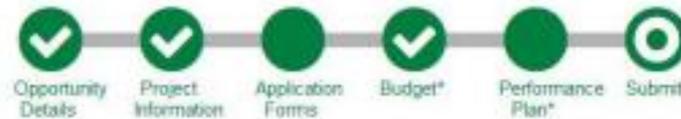
When the application is fully complete, please select the "Submit" button. This will submit your final application to the funder.

 Review

Submit

Applicant Portal – Submission Error Messages

- If anything is incomplete you will not be able to submit the Application.
- Incomplete sections are green circles with no checkmark or white circles.
- AmpliFund displays a validation errors for anything that is not complete.
- Navigate to a different section by clicking on the appropriate timeline object above. For example, click Application Forms in the Navigation Timeline to navigate back to and complete the Application Forms.



You are about to submit your application, **Test App**, to **Nebraska Department of Economic Development**.

Take the time to review your application by using the timeline above. You can select any section and jump to that page.

When the application is fully complete, please select the "Submit" button. This will submit your final application to the funder.

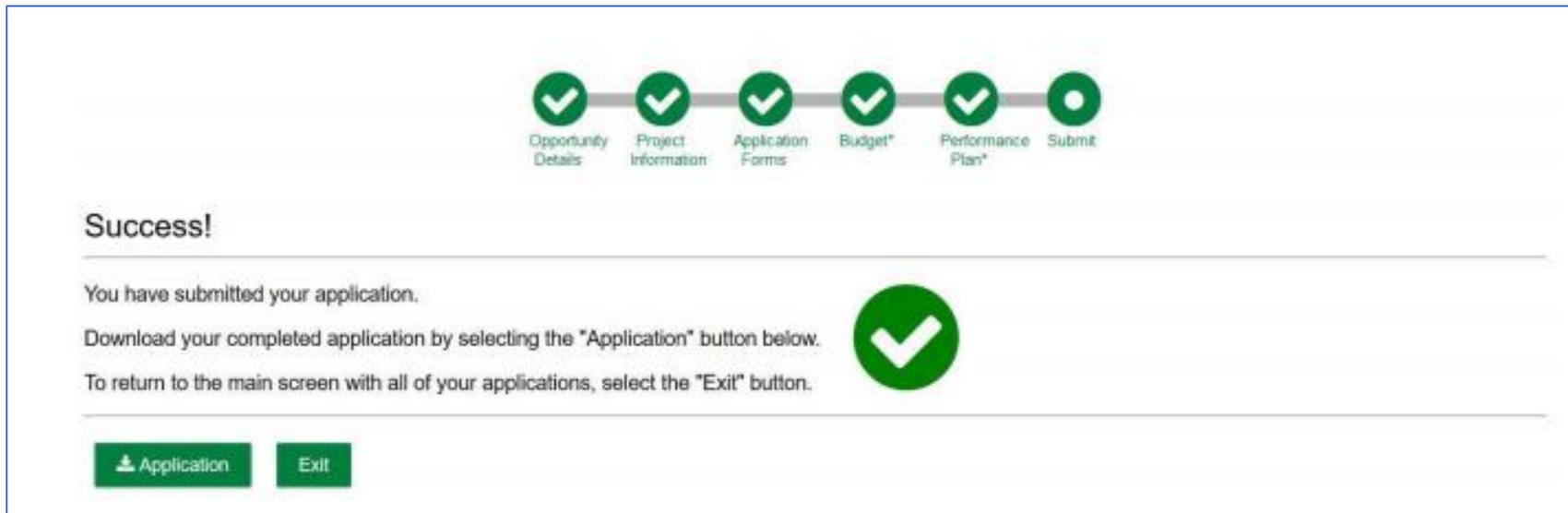
You have forms that are either "New" or "In Progress" for this application!

You have empty strategies in the performance plan which require Goals!



Applicant Portal Guide – Submit Application

- Once you have successfully submitted your application, a success message will appear on your screen and you will receive an email notifying you of the date and time of your submission.
- Once the application has been submitted, no changes can be made to the application, but it can be accessed and viewed at any time by logging back into the Applicant Portal at <https://il.amplifund.com>.



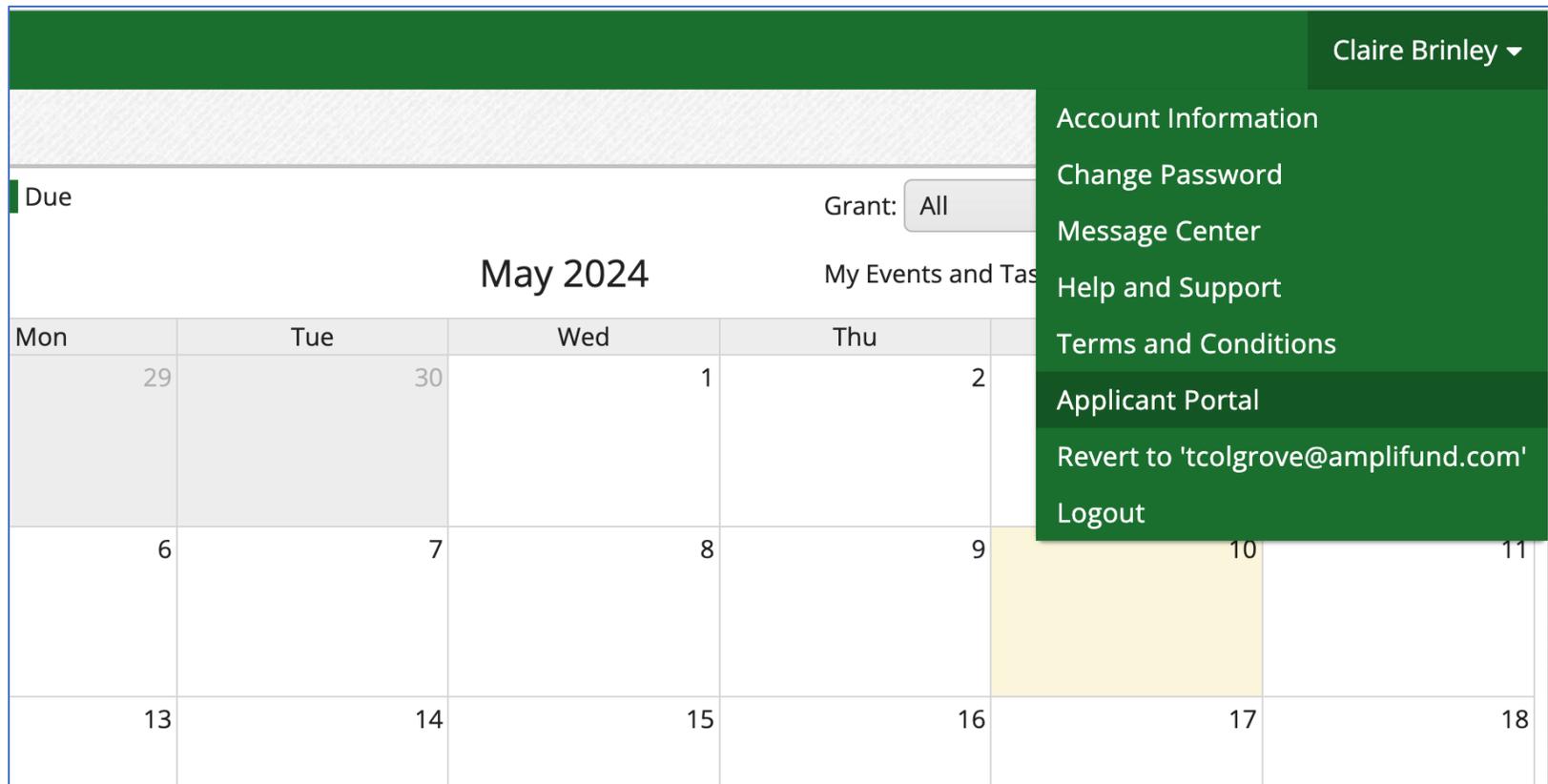
Navigate to AmpliFund from the Applicant Portal

- Click on your name on the top right of the screen and select AmpliFund navigate back to AmpliFund.

The screenshot displays the AmpliFund Applicant Portal interface. At the top left is the AmpliFund logo. At the top right, the user's name "Thomas Colgrove" and affiliation "Illinois Finance Authority" are shown in a dropdown menu. Below the name, there are two options: "AmpliFund" and "Log Out". The main content area features the title "Federal Formula Grant Funding: Section 40101(d) – Preventing Outages and Enhancing the Resilience of the Electric Grid". Below the title is a progress bar with five steps: "Opportunity Details", "Evaluation & Scoring", "Project Information", "Application Forms (2)", and "Submit". The first three steps are marked with green checkmarks, while the last two are marked with white circles. At the bottom left, there is a "How to Apply" section with "1 of 2" below it. At the bottom right, there are three buttons: "Download", "Save", and "Save & Continue".

Navigate to the Applicant Portal from AmpliFund

- Click on your name on the top right of the screen and select Applicant Portal to navigate back to the Applicant Portal.



The screenshot displays the AmpliFund user interface. At the top right, the user's name 'Claire Brinley' is shown with a dropdown arrow. The dropdown menu is open, listing several options: Account Information, Change Password, Message Center, Help and Support, Terms and Conditions, Applicant Portal (highlighted in a darker green), Revert to 'tcolgrove@amplifund.com', and Logout. Below the menu, a calendar for May 2024 is visible, showing dates from 29 to 18. The calendar is partially obscured by the dropdown menu. The background of the interface is white with a green header bar.

Mon	Tue	Wed	Thu	Fri	Sat	Sun
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19

In-Product Demo

Next Steps

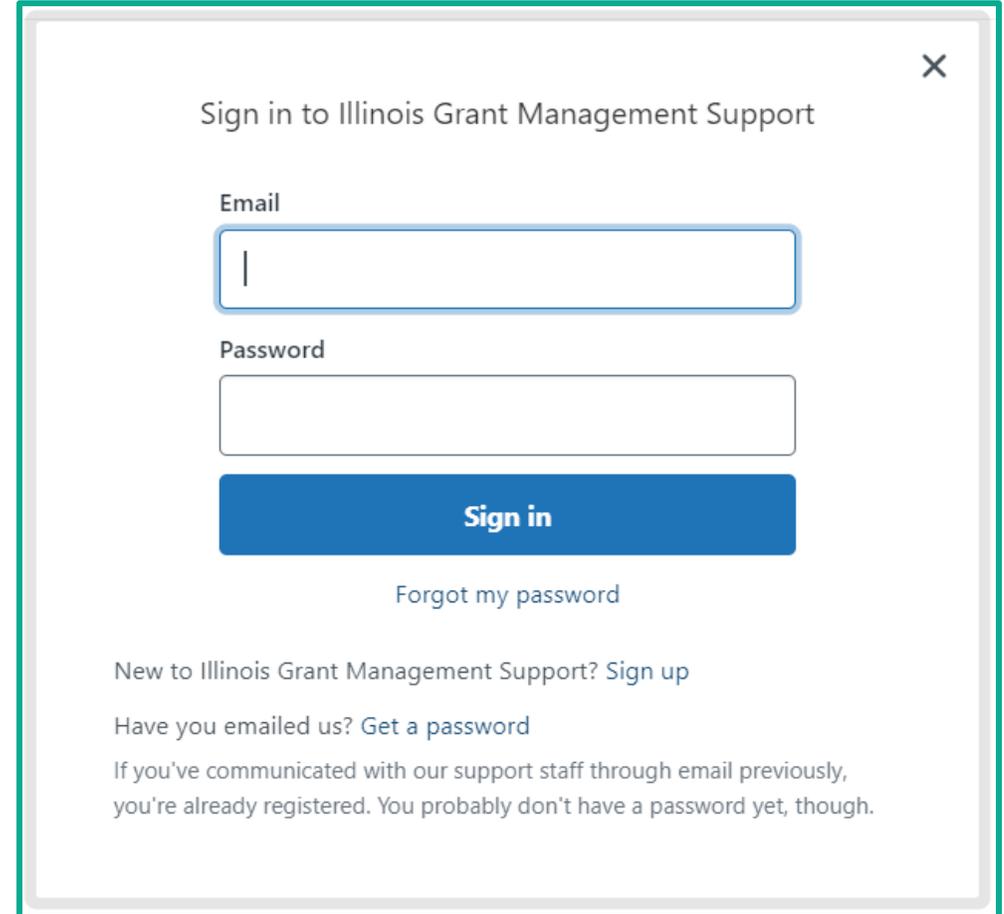
Next Steps

- Build Reviewer Only fields on an Application Form or Form Template.
- Submit a Test Application.
- Prepare an Application Review Workflow example for the next session.

Customer Support

Create AmpliFund Support Account

1. Access the appropriate support site.
2. Click the **Sign up** link.
3. Enter your **full name**.
4. Enter your **email address**.
5. Complete the **I'm not a robot** check.
6. Click the **Sign up** button.
7. An email from support@zendesk.com will be sent to you via email.
8. Click the link to set your password.



Sign in to Illinois Grant Management Support

Email

Password

Sign in

[Forgot my password](#)

[New to Illinois Grant Management Support? Sign up](#)

[Have you emailed us? Get a password](#)

If you've communicated with our support staff through email previously, you're already registered. You probably don't have a password yet, though.

AmpliFund Illinois Support Portal

Submit a support ticket:

Commercial - support@amplifund.zendesk.com.

Illinois - support@il-amplifund.zendesk.com.

Nebraska - support@ne-amplifund.zendesk.com.

Visit Support Portal:

Commercial - <https://amplifund.zendesk.com>.

Illinois - <https://il-amplifund.zendesk.com>.

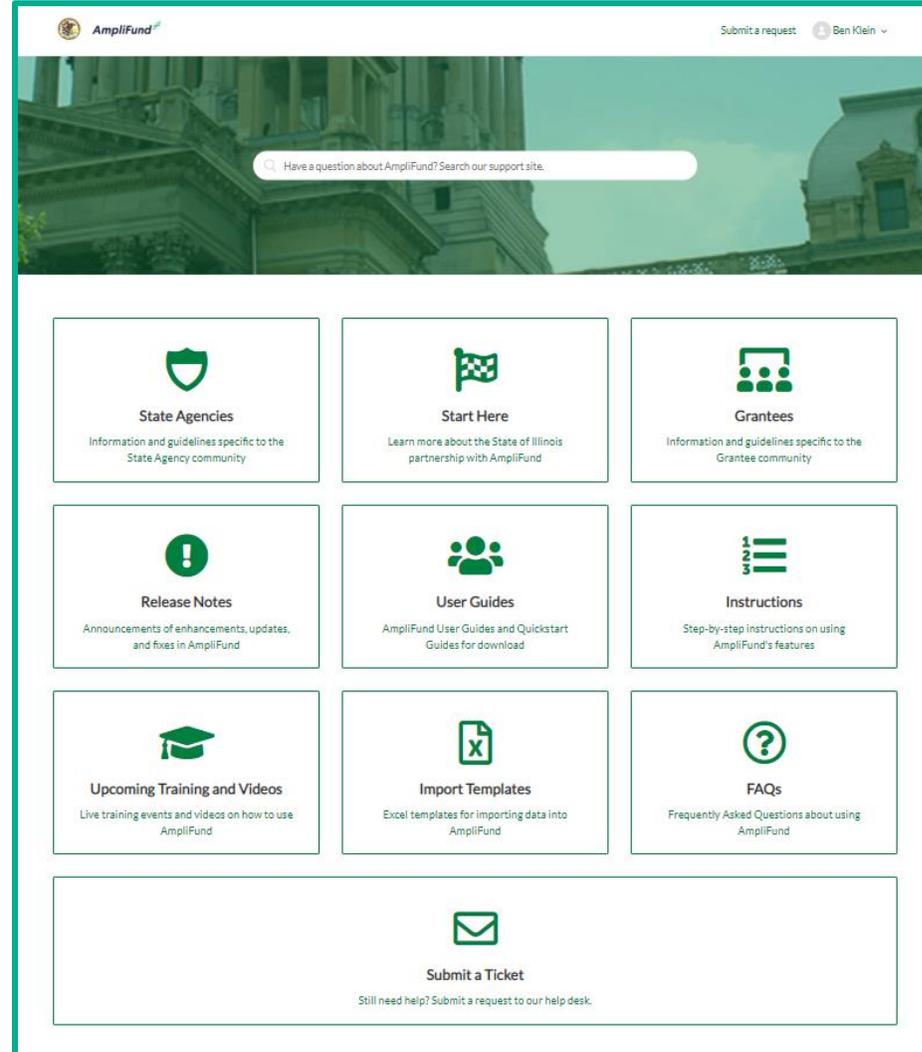
Nebraska - <https://ne-amplifund.zendesk.com>.

Production Site:

Commercial - <https://www.gotomygrants.com>.

Illinois - <https://il.amplifund.com>.

Nebraska - <https://ne.amplifund.com>.



Question & Answer