Core Series Recipient 1 – Applicant Portal: Application Overview and Submission

We will start 2 minutes after the hour!

Recipient Core Series

- Day 1 – Applicant & Recipient Core Series: AmpliFund Applicant Portal: Application Overview and Submission

- Day 2 – Applicant & Recipient Core Series: AmpliFund Navigation and Recipient Performance Reporting

- Day 3 – Applicant & Recipient Core Series: Recipient Financial Reporting

- Day 4 – Applicant & Recipient Core Series: Advanced Recipient Management and Tools

- Day 5 – Applicant & Recipient Core Series: State of Illinois Unique Applicant & Recipient Configurations

Agenda

AmpliFund

- Process Overview
- Overview of Applicant Portal
  - Create and Manage Applicant Portal Account
  - Project Information
  - Application Forms
  - Performance Plan
  - Budget
- Edit Reopened Application
- Administration and Support
- In-Product Demo
- Key Concepts
- Customer Support
- Question and Answer
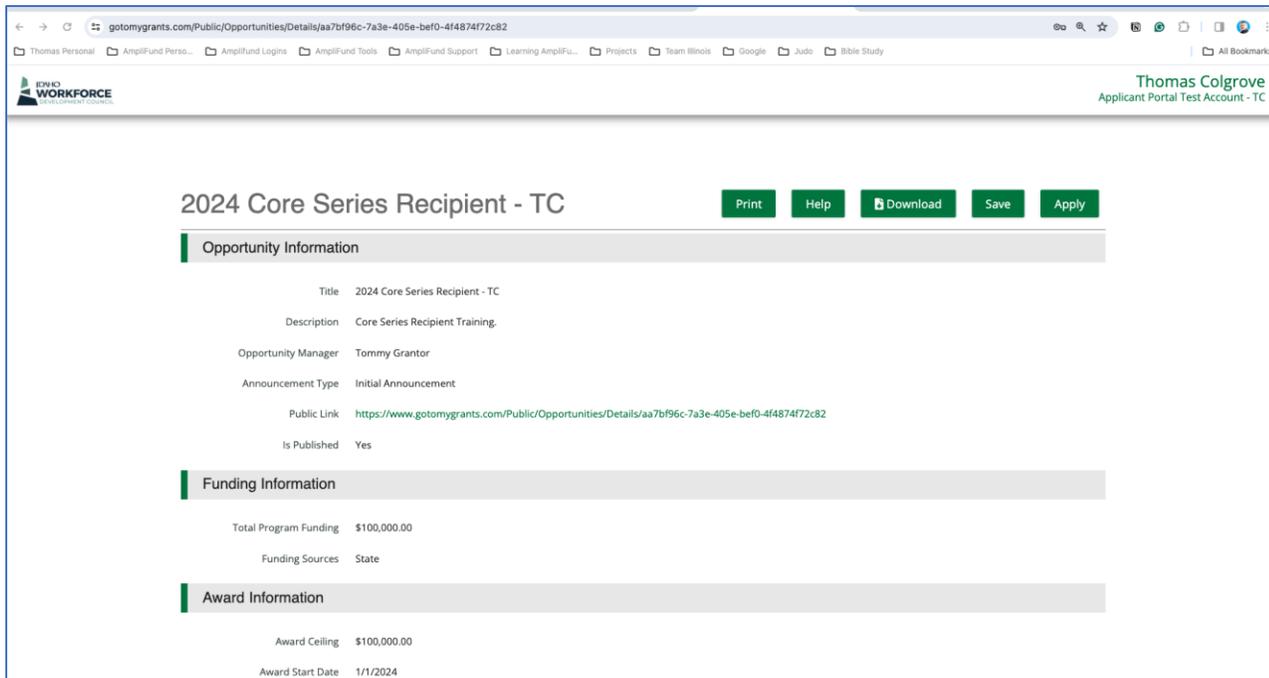
Overview of Applicant Portal

Section Agenda

- Applicant Portal Overview
  - Create Applicant Portal Account
  - Account Information
  - Manage Applications
  - Manage Users

Create Applicant Portal Account

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If you are accessing the Applicant Portal for the first time you must create an account by following the steps below:

- Click on the public link to the Opportunity provided by your funder
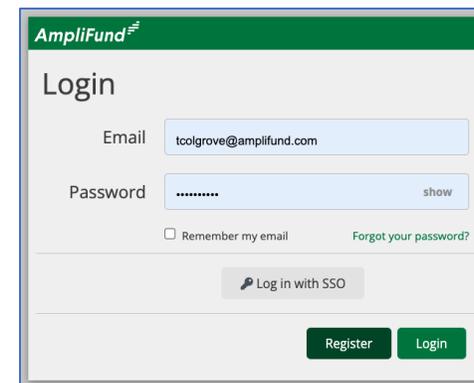
- Click Log In on the top right of the screen or the Apply button

- Click Register

Create New Account Continued

- Fill out all required information
- Click Register on the bottom right of the screen

Account Information

- Click on your Username on the top right of the screen

- Select Account Information

- Edit Account Information as needed
  - Complete all required information and then click Save & Return

Manage Applications

- Click on Applications to view list of all Applications and Application Status

Thomas Colgrove
Applicant Portal Test Account - TC

Applications   Account Information   Users   FAQ

Applications

Application Na...	Application ID	Submission Sta...	Funder Name	Title	Opportunity St...	Submission Op...	Submission Clo...	Award Floor	Award Ceiling
Test Application 1	61812	Submitted	AmpliFund Training: Grant Maker	2024 Core Series Recipient - TC	Open	1/1/2024 12:00 AM	12/31/2024 12:00 AM		$100,000.00

User Management

- Click on Users

- Add users as needed
  - Complete all required information and then click Invite

- Edit Users as needed
  - Complete all required information and then click Save & Return

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Project Information

Section Agenda

- Project Information
    - Opportunity Information
    - Evaluation and Scoring Tab
    - Apply
    - Navigation
    - Required Fields
    - Autofill Data
    - No Match Example
    - Match Examples
    - Mark as Complete, Save and Continue

Opportunity Information and Evaluation & Scoring

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Apply to the Opportunity

- Click the Apply button to start the application process

Navigation

- Land on the Project Information Page

Navigation Continued

- All navigation sections on the top of the screen must be complete before submitting your application

- Each circle should be green with a white checkmark like the Opportunity Details section below

- Navigate to different sections of the application by clicking on the desired navigation section

Required Fields

- Ensure each section is complete in the top navigation, you must complete all required fields marked with an *

Autofill Data

- The Primary Contact Information section will auto-populate with the information from the Applicant Portal

- Review the steps in the Overview of Applicant Portal section to update the information so you only have to enter it once

No Match Example

- If no match is required, you will not see any fields to enter match
- If match is optional, you will have a $0.00 requirement and can add as needed

Match Example

- If a match is required, there will be an additional required section called "How much are you planning on contributing to the budget?"

- If your funder configured a match requirement, AmpliFund will calculate the minimum match amount based on the Award Requested amount

- If match is optional, you will have a $0.00 requirement and can add as needed

Mark as Complete, Save and Continue

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- After completing all required fields Mark as Complete and Save and Continue

- AmpliFund will not let you Mark as Complete and Save and Continue if there are any incomplete required fields

- AmpliFund displays validation errors if there are incomplete required fields or if entries are not in line with the Opportunity requirements

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Application Forms

Section Agenda

- Application Forms
  - Inputting Data
  - Required Fields
  - Mark as Complete, Save and Continue
  - Application Form Status Grid

Inputting Data

Content Fields

- Data that your funder provides as instructions, attachments, links, etc.

Entry Fields

- Data that you enter on the Application Forms

- Single line text, multi-line text, multiple choice, checkboxes, dropdowns, dates, numeric values, tables, and file uploads

Required Fields

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- To complete each Application Form, you must complete each required field marked with an *

Mark as Complete, Save and Continue

- You must mark each Application Form as complete and then save and continue or you will not be able to submit

- AmpliFund will not allow you to Mark as Complete if you have not completed all required fields

- Clicking Save and Continue will take you to the next Application Form or next section of the application process

Application Form Status Grid

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- Click on the Application Forms section on the top navigation to access the Application Form Status Grid

- Here you can see the status of each application and download applications

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Performance Plan

Section Agenda

- Performance Plan
  - Performance Plan Goal Types
  - Enter Performance Plan Goals
  - Mark as Complete, Save and Continue

Performance Plan Goal Types

Goal Type	Definition	Example
Milestone	The most basic goal type. They allow for tracking progress as a "Yes" or "No" response by the Responsible Individual.	Create and send Q1 Staff Survey.
Narrative	Question and answer goals. Responsible Individuals may answer the question posed by the goal.	How successful was the grant-related activity this period?
Numeric	A discrete number to achieve. As units of the goal are completed, Responsible Individuals may record units completed.	"Number of program participants" with a goal target of 50.

Performance Plan Goal Types

Goal Type	Definition	Example
Percent Achieved	Goals to reach a desired percent. When tracking progress against a percent achieved goal, Responsible Individuals may capture Total Possible and Total Achieved percentages.	"Volunteer Retention Rate" with a goal target of 70%.
Percent Changed	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.	"Decrease in Student Absences" with a starting absentee rate of 10% and a goal absentee rate of 3%.
Reimbursement	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.	"Number of Patient Screenings" with target/maximum units of 100, and a reimbursement rate per unit of $22.

Enter Performance Plan Goals

- All Performance Plan Goals marked with an * are required
- Click on the + icon to add a new goal

Enter Performance Plan Goals Continued

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- Select the Goal Type

- Enter the Goal Name

- Complete all required fields marked with an *

- Best practice is to add as much data as possible

- Required fields change based on the Goal Type
  - Milestone Goals have a due date
  - Numeric Goals have a number to be achieved

New Goal

Goal Information

Goal Type* — Milestone

Name*

Description

Due Date

Save

New Goal

Goal Information

Goal Type* — Milestone

| Milestone |
| Narrative |
| Numeric |
| Percentage Achieved |
| Percentage Change |
| Reimbursement |

Name*

Description

Due Date

Save

New Goal

Goal Information

Goal Type* — Numeric

Name* — Test Numeric Goal

Number To Be Achieved* — 24

Description — Add description here...

Save

Mark as Complete, Save and Continue

- After entering all required goals you can Mark as Complete and Save and Continue

- AmpliFund will display a success message if everything is complete

- AmpliFund will display a validation error if more information is required

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Budget

Section Agenda

- Project Information and Budget

- Enter Line Items
  - No Match/Match
    - Line Item Narrative and Document Upload
  - Calculated Line Item Example
  - Purpose Areas
  - Edit Line Items
  - Final Budget/Mark as Complete, Save and Continue
  - Submit Complete Application
  - In-Product Demo

Enter Line Items with no Match

- Configure the Budget View Settings
- Click on the + icon next to the Budget Category you wish to enter a line item
- Enter the Name
- Enter the Direct Cost
- Leave Non-Grant Funded set to No
- Enter Narrative (May be required or optional)
- Add Attachments as needed
- Click Create on the bottom right of the screen

Enter Line Items with Match

- Click on the + icon next to the Budget Category you wish to enter a line item
- Enter the Name
- Enter the Direct Cost
- Set the Non-Grant Funded to Yes
  - Cash Match
  - In-Kind Match
  - Other Funding
  - Match can be entered in $ or as a %
- Enter Narrative (May be required or optional)
- Add Attachments as needed
- Click Create on the bottom right of the screen

Calculated Line Item Example

- The Calculated Line Item functionality allows for auto calculations when entering Line Items

- Click the Item Type dropdown and select Direct Cost Allocation

- The Calculation Type dropdown appears with the following options
  - Base x Rate
  - Quantity x Rate
  - Salary x Percentage x Rate
  - Time x Quantity x Rate
  - Travel x Quantity x Rate

- Configure the new required fields based on your selection

- All other steps to enter the Line Item are the same as previously reviewed

Calculated Line Item Continued

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New Line Item

Budget Item Information

Category	Travel
Item Type	✓ Non-Personnel
	Personnel
Name*	Direct Cost Calculation
Direct Cost*	$0.00
Non-Grant Funded	No
Total Budgeted	$0.00
Narrative*	

Attachments

Attachment(s)   Choose file(s)

Create   Cancel

New Line Item

Budget Item Information

Category	Travel
Item Type	Direct Cost Calculation
Calculation Type	✓ Base x Rate
	Quantity x Rate
Name*	Salary x Percentage x Time
	Time x Quantity x Rate
Base*	Travel x Quantity x Rate
Rate*	0%
Direct Cost	$0.00
Non-Grant Funded	No
Total Budgeted	$0.00
Narrative*	

Create   Cancel

Enter Line Item with Purpose Areas

- Some Budget entries require Purpose Areas
- If a Category requires Purpose Areas you will complete the same steps as previously reviewed when creating the Line Item in addition to the following entries
  - Enter Name
  - Enter Direct Cost
  - Configure Match if required
  - Enter Narrative
  - Add attachments if needed
  - Enter how much of the Direct Cost goes toward each Purpose Area
    - › For example, If this program has three Funding Areas (Purpose Areas) and I add a Line Item for Equipment with a Direct Cost of $10,000, I must account for how much of the Direct Cost goes toward each Purpose Area.
      - All Direct Cost must be accounted for
      - Not all Purpose Areas must have entries

Enter Line Item with Purpose Areas Continued

New Line Item

Budget Item Information

Category: Equipment

Item Type: Non-Personnel

Name*: Test Equipment

Direct Cost*: $10,000.00

Non-Grant Funded: No

Total Budgeted: $10,000.00

Narrative*: Test narrative...

Attachments

Attachment(s): Choose file(s)

Create

New Line Item

Test narrative...

Attachments

Attachment(s): Choose file(s)

Purpose Areas

Test Purpose Area 1: $0.00

Test Purpose Area 2: $0.00

Test Purpose Area 3: $0.00

Total: $0.00

Total must equal Total Budgeted amount.

Create   Cancel

New Line Item

Narrative*: Test narrative...

Attachments

Attachment(s): Choose file(s)

Purpose Areas

Test Purpose Area 1: $5,000.00

Test Purpose Area 2: $5,000.00

Test Purpose Area 3: $0.00

Total: $10,000.00

Create   Cancel

Edit Line Items

- Click on the pencil edit icon next to the Line Item to edit as needed

Budget   Help   Download   Save & Continue

Budget View Settings

Options

☑ Line Items ☑ Non-Grant Funded

Proposed Budget

Expense Budget

Category	Grant Funded	Non-Grant Funded	Total Budgeted
+ Travel	$10,000.00	$0.00	$10,000.00
Test Travel	$10,000.00	$0.00	$10,000.00
+ Equipment	$0.00	$0.00	$0.00
+ Supplies	$0.00	$0.00	$0.00
+ Construction	$0.00	$0.00	$0.00
+ Consultant	$0.00	$0.00	$0.00
+ Personnel	$0.00	$0.00	$0.00
+ Create New Category			
Total Expense Budget Cost	**$10,000.00**	**$0.00**	**$10,000.00**

Edit

Final Budget/Mark as Complete, Save and Continue

- The Final Budget should account for all requested Grant Funds and any Match requirements

- The Total Overall Budget Cost should be $0.00

- AmpliFund will display a validation error if not all funds are accounted for

Proposed Budget (left)

Expense Budget

Category	Grant Funded	Non-Grant Funded	Total Budgeted
Travel	$0.00	$25,000.00	$25,000.00
Travel	$0.00	$25,000.00	$25,000.00
Equipment	$0.00	$0.00	$0.00
Supplies	$0.00	$0.00	$0.00
Construction	$0.00	$0.00	$0.00
Consultant	$0.00	$0.00	$0.00
Personnel	$75,000.00	$0.00	$75,000.00
Test Personnel	$75,000.00	$0.00	$75,000.00
Create New Category			
Total Expense Budget Cost	$75,000.00	$25,000.00	$100,000.00

Revenue Budget

Grant Funding			
Award Requested	$100,000.00		$100,000.00
Subtotal	$100,000.00		$100,000.00
Non-Grant Funding			
Cash Match		$10,000.00	$10,000.00
In-Kind Match		$10,000.00	$10,000.00
Other Funding		$5,000.00	$5,000.00
Subtotal		$25,000.00	$25,000.00

Total Revenue Budget Cost		($125,000.00)
Total Overall Budget Cost		($25,000.00)

The Total Overall Budget Cost must be $0.00

✔ Mark as Complete   Save & Continue

Proposed Budget (right)

Expense Budget

Category	Grant Funded	Non-Grant Funded	Total Budgeted
Travel	$0.00	$25,000.00	$25,000.00
Travel	$0.00	$25,000.00	$25,000.00
Equipment	$0.00	$0.00	$0.00
Supplies	$0.00	$0.00	$0.00
Construction	$25,000.00	$0.00	$25,000.00
Test Construction	$25,000.00	$0.00	$25,000.00
Consultant	$0.00	$0.00	$0.00
Personnel	$75,000.00	$0.00	$75,000.00
Test Personnel	$75,000.00	$0.00	$75,000.00
Create New Category			
Total Expense Budget Cost	$100,000.00	$25,000.00	$125,000.00

Revenue Budget

Grant Funding			
Award Requested	$100,000.00		$100,000.00
Subtotal	$100,000.00		$100,000.00
Non-Grant Funding			
Cash Match		$10,000.00	$10,000.00
In-Kind Match		$10,000.00	$10,000.00
Other Funding		$5,000.00	$5,000.00
Subtotal		$25,000.00	$25,000.00

Total Revenue Budget Cost		($125,000.00)
Total Overall Budget Cost		$0.00

Mark as In Progress   Save & Continue

Submit Complete Application

- All navigation sections on the top of the screen must be complete before submitting your application

- Each circle should be green with a white checkmark like the Opportunity Details section below

- If you receive any validation errors, you can click on the desired navigation section and complete all required information and Mark as Complete and Save and Continue

2024 Core Series Recipient - TC

Opportunity Details | Evaluation & Scoring | Project Information | Application Forms | Budget* | Performance Plan* | Submit

You are about to submit your application, **Test Application 2**, to **AmpliFund Training: Grant Maker.**

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.

Your budget has errors that require your attention!

Review   Submit

2024 Core Series Recipient - TC

Opportunity Details | Evaluation & Scoring | Project Information | Application Forms | Budget* | Performance Plan* | Submit

You are about to submit your application, **Test Application 2**, to **AmpliFund Training: Grant Maker.**

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

Submit Complete Application Continued

- Click Submit and AmpliFund displays a success message!
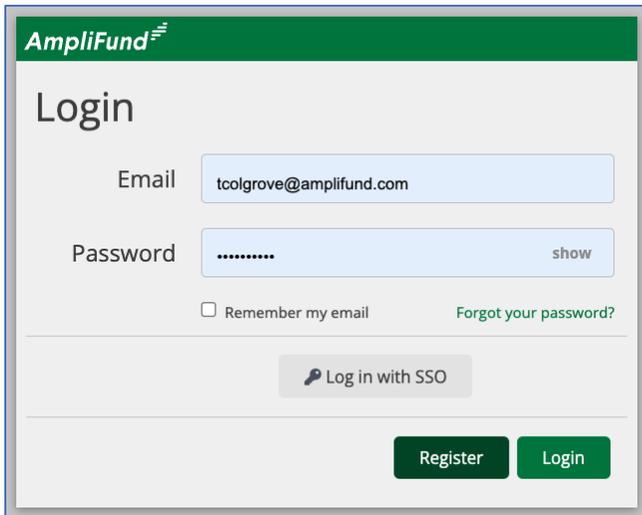
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Edit Reopened Application

Section Agenda

- Edit Reopened Applications
  - Access Submitted Applications
  - Download Submitted Applications
  - Edit Reopened Applications
  - Warning – Withdrawing Applications does not allow for Resubmission

Access Submitted Applications

- Log into the Applicant Portal
- Click Applications on the top left of the screen

Download Submitted Applications

- Click on the desired Application

- Click on the Download tab

Edit Reopened Applications

- Select the Application that says Reopened

- Edit the appropriate sections of the Application Form

- The funder chooses what sections of the Application to Reopen

Applications	Account Information	Users	FAQ

Applications

Application Na...	Application ID	Submission St...	Funder Name	Title	Opportunity St...	Submission Op...	Submission Cl...	Award Floor	Award Ceiling
Test Application 1	61812	Submitted	AmpliFund Training: Grant Maker	2024 Core Series Recipient - TC	Open	1/1/2024 12:00 AM	12/31/2024 12:00 AM		$100,000.00
Test Application 2	61831	Submitted	AmpliFund Training: Grant Maker	2024 Core Series Recipient - TC	Open	1/1/2024 12:00 AM	12/31/2024 12:00 AM		$100,000.00
2024 Core Series Recipient - TC 🗑	61874	Unsubmitted	AmpliFund Training: Grant Maker	2024 Core Series Recipient - TC	Open	1/1/2024 12:00 AM	12/31/2024 12:00 AM		$100,000.00

Withdrawing Applications

- Withdrawing applications does not allow for Resubmitting
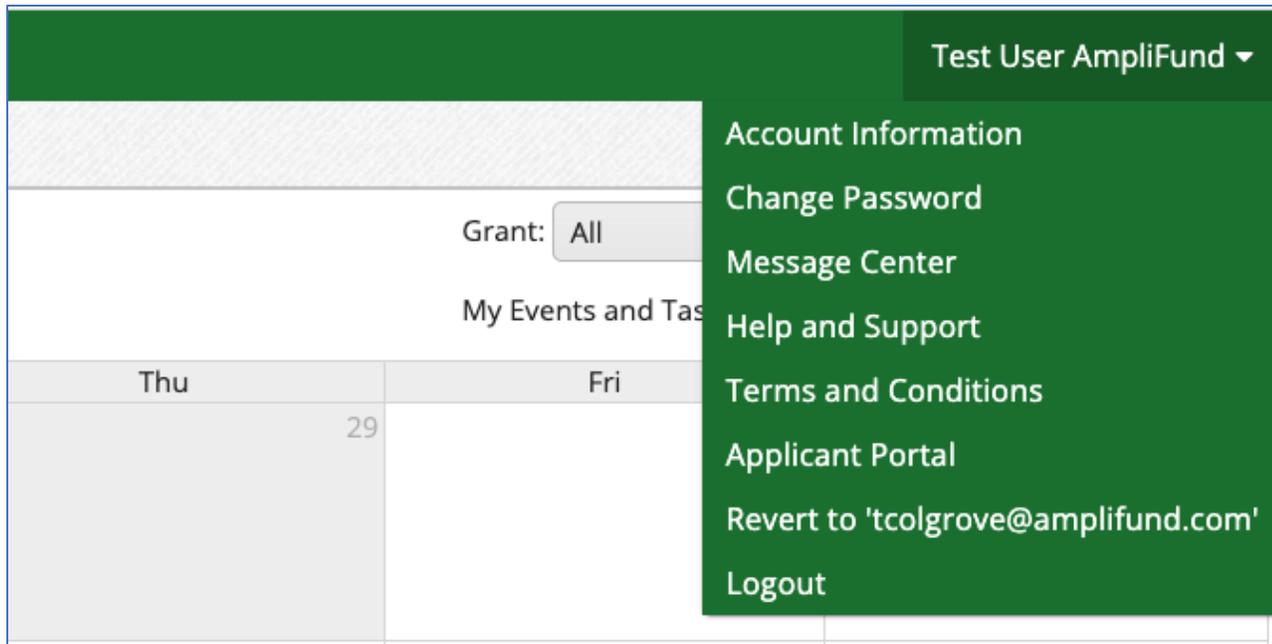
AmpliFund

Administration and Support
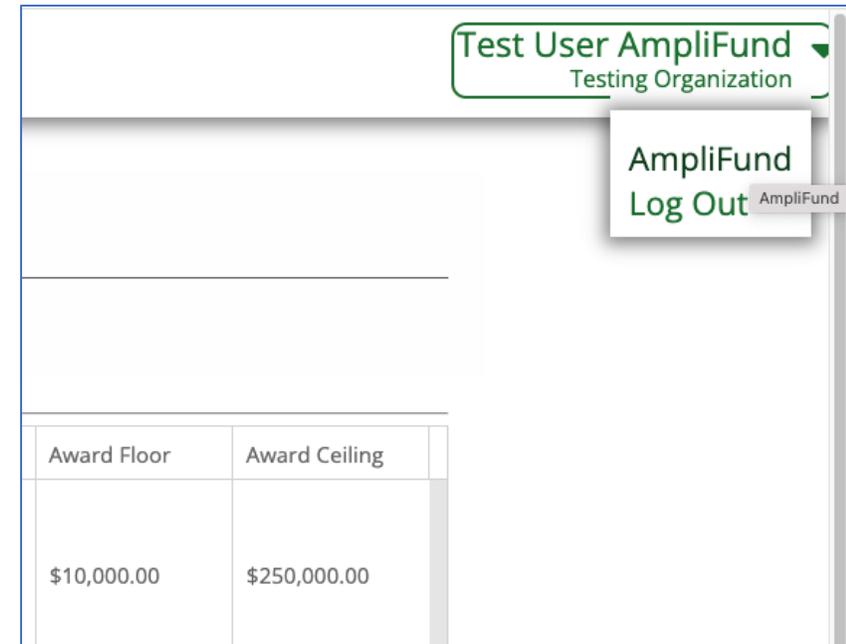
Section Agenda

- Toggle Between Applicant Portal and AmpliFund Account

- What to do if you start two Organizations or Applications

- In-Product Demo

Toggle between AmpliFund / Applicant Portal

- Click on your name on the top right of the screen and select Applicant Portal or AmpliFund

Add User

- Click on Administration > System Security > Users
- Click on the + Icon on the top right of the screen
- Complete the User Information Section
- Complete all other required fields marked with an *
- Click Create on the bottom right of the screen
- Click on the envelope icon to invite them into AmpliFund

Change Account Owner

- Click Administration > Liscense Information
- Click on the pencil edit icon on the top right of the screen
- Update the Primary Admin User
- Click update on the bottom right of the screen

Two Organizations or Applications

- If you have accidentally submitted two Applications for the same Opportunity, you can delete/withdraw one from the Applicant Portal.

- If you are intentionally submitting two Applications to the same Opportunity, they must have unique names.

- If you have accidentally created two Organizations and are working on Applications from both, you will need to ask AmpliFund Customer Support to merge the accounts. Approval from an Organizational Admin from each account is required.

Admin and Support

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In-Product Demo

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Key Concepts

Key Concepts

AmpliFund

- Creating and managing the Applicant Portal Account
- Applying to the Opportunity in AmpliFund
  - Opportunity Details
  - Project Information
  - Application Forms
  - Performance Plan
  - Budget
  - Submission
- Manage Applications
- Toggle between the Applicant Portal and AmpliFund accounts

Next Session: AmpliFund Navigation and Performance Reporting

AmpliFund

Customer Support

Create AmpliFund Support Account

AmpliFund

1. Go to the appropriate support site
   - o https://amplifund.zendesk.com
   - o https://il-amplifund.zendesk.com
   - o https://ne-amplifund.zendesk.com
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
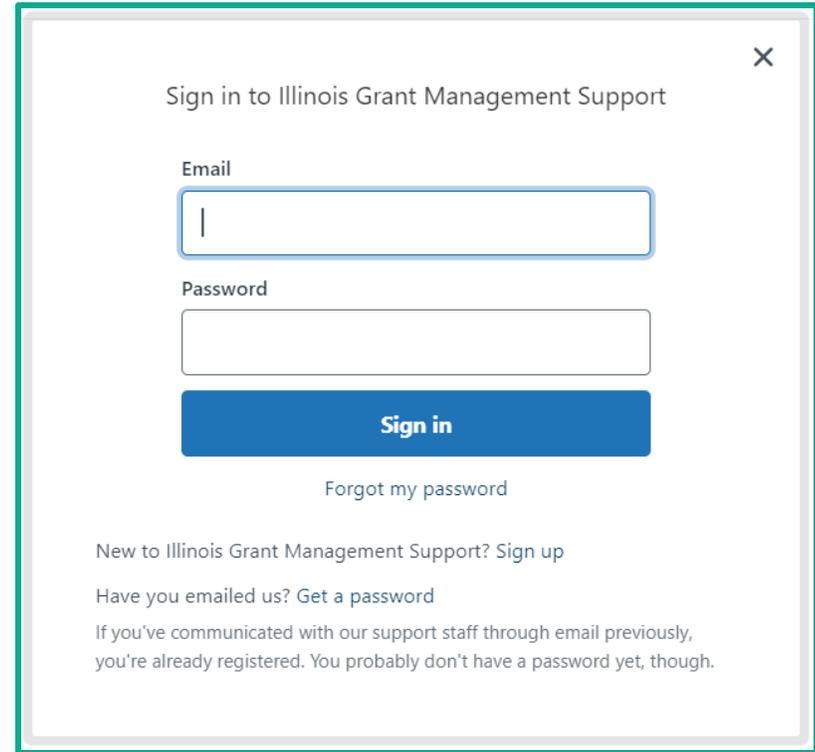
Sign in to Illinois Grant Management Support

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.
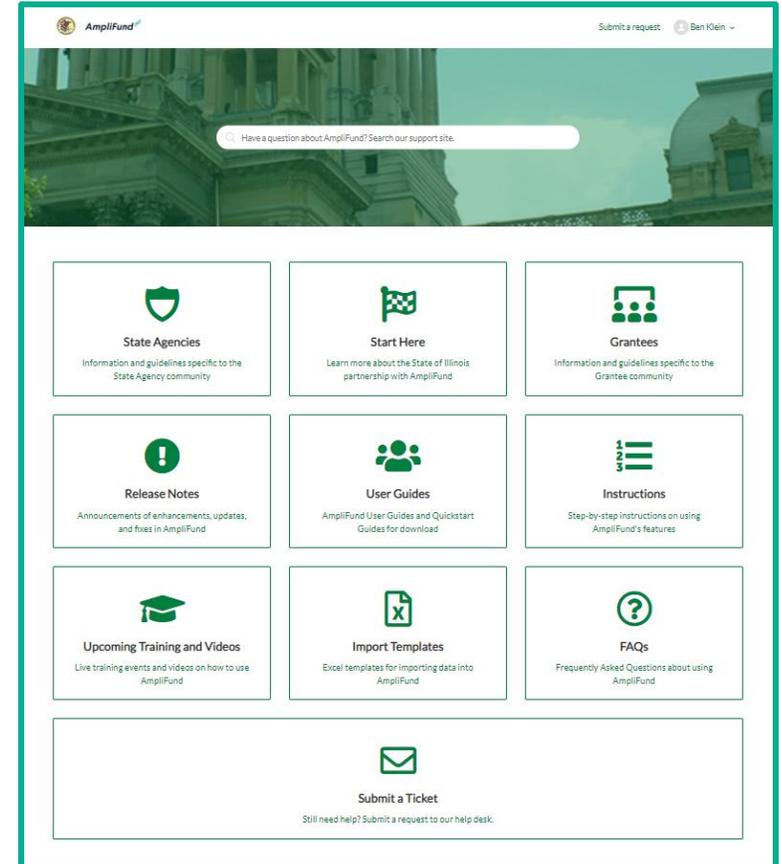
AmpliFund Illinois Support Portal

Submit a support ticket:

- Commercial – Support@amplifund.zendesk.com
- Illinois – Support@il-amplifund.zendesk.com
- Nebraska – Support@ne-amplifund.zendesk.com

Supported Browsers:

- Google Chrome (current supported releases)
- Mozilla Firefox (current supported releases)
- Microsoft Edge (current supported releases)
- Apple Safari 10+

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Question and Answer