

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 Amount	= Percentage Cash Match x Direct Cost	
In-Kind Amount	= Percentage In-Kind Match x Direct Cost	
Other Funding Amount	= Percentage Other Funding 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	

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</i> > <i>Settings</i> > <i>Grant Settings</i> .
Reminders	Grant Details	Reminders for Reporting Periods are set in the grant's <i>Post-Award tab</i> > <i>Settings</i> > <i>Reminders</i> .

Field/Date	Calculation/Source	Additional Information
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 and other funding for period	
Actual Total	= Actual Grant Funded + Actual Match + Actual In-Kind + Actual Other Funding	
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 and other funding amount for period	
Budgeted Total	= Budgeted Grant Funded + Budgeted Match + Budgeted In-Kind + Budgeted Other Funding	
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	

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> .
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 and other funding for period	

Field/Date	Calculation/Source	Additional Information
Actual Total	= Actual Grant Funded + Actual Match + Actual In-Kind + Actual Other Funding	
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 and other funding for period	
Budgeted Total	= Budgeted Grant Funded + Budgeted Match + Budgeted In-Kind + Budgeted Other Funding	
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 <i>New</i> 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	

Field/Date	Calculation/Source	Additional Information
Variance for Period	= Budgeted Amount for period – Expenses for period	
Variance Grant To Date	= Budgeted Amount – Expenses	

Award Management

Award Details

Field/Date	Calculation/Source	Additional Information
Approved Invoices	Sum of all approved payment requests	This information pulls from an award record's <i>Post-Award tab>Cash Flow>Payment Requests</i> .
End Date	= Start Date + Length of Award	
Grant-Funded Amount	Awarded amount including any approved amendments	
Invoiced To Date	Sum of all submitted payment requests, including rejected	This information pulls from an award record's <i>Post-Award tab>Cash Flow>Payment Requests</i> .
Funding Sources Available	= Total Committed - Total Awarded - Current Amount	
Length of Award	Years, months, and days from the Start Date to End Date or Extended Date	
Match Contributions To Date	Sum of all match and other funding on expenses that have not been denied or deleted	
Match Requirement	Total required match and other funding for award	
Payments Made To Date	Sum of all payment authorizations with Paid status	This information pulls from an award record's <i>Post-Award tab>Cash Flow>Payment Authorizations</i> .
Pending Invoices	Sum of all payment requests that have not been paid or decided on	This information pulls from an award record's <i>Post-Award tab>Cash Flow>Payment Requests</i> .
Remaining Available Budget	=Remaining Available Grant-Funded Amount + Remaining Match Requirement	
Remaining Available Grant-Funded Amount	=Total Awarded Amount - payment requests with approved or pending status	
Remaining Match Requirement	=Match Requirement -Match Contributions To Date	

Field/Date	Calculation/Source	Additional Information
Total Awarded Amount	Sum of all funding sources	
Total Budget	= Awarded Amount + Cash Match + In-Kind Match + Other Funding	

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> > <i>Commitments</i> .

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	<div>= Dollar amount or percentage of Annual Salary</div> <div>-- OR --</div> <div>= Dollar amount or percentage of Hourly Rate</div> <div>x Hours Per Week</div> <div>x 52 weeks per year</div>	

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 Actuals	Sum of all grant-funded expenses that are not in a Denied or New status	
Grant-Funded Budgeted	<ul style="list-style-type: none"> Personnel Line Item = Salary + Benefits Non-Personnel Line Item = Direct Cost - Match - Other Funding Benefit Type Line Item = Direct Cost - Match - Other Funding 	Direct Cost = Grant Funded + Cash Match Amount+ In-Kind Amount
Grant-Funded Remaining	= Grant-Funded Budgeted - Grant-Funded Actuals	
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 Actuals	Sum of all match and other funding expenses that are not in a Denied or New status	
Match Budgeted	= Cash Match Amount + In-Kind Amount + Other Funding Amount	
Total Actuals	= Grant-Funded Expenses + Match Expenses + Other Funding Expenses	

Field/Date	Calculation/Source	Additional Information
Total Budgeted	= Grant-Funded Budgeted + Match Budgeted + Other Funding Budgeted	
Total Expense Budget Cost	Sum of all line items in the expense budget	
Total Overall Budget Cost	= Total Expense Budget Cost – Total Revenue	
Total Remaining	= Total Budgeted – Total Actuals	
Total Revenue	Sum of all grant funding	
Total Revenue Budget Cost	= Total Revenue + Match + Other Funding	
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)	

Field/Date	Calculation/Source	Additional Information
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	
Other Funding	= Percentage Other Funding x Direct Cost	

Field/Date	Calculation/Source	Additional Information
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
Approved Invoices	Sum of all approved payment requests	This information pulls from <i>Post-Award tab >Cash Flow>Payment Requests</i> .
Cash Received To Date	Sum of all cash receipts	This information pulls from <i>Post-Award tab >Cash Flow>Cash Receipts</i> .
Close Out Date	= End Date + 6 months	
Grant Budget	Sum of awarded amount and post-award match	
Grant-Funded Amount	Awarded amount including any approved amendments	
Invoiced To Date	Sum of submitted payment requests, including rejected	This information pulls from <i>Post-Award tab >Cash Flow>Payment Requests</i> .
Length of Award	Years, months, and days from the Start Date to End Date or Extended Date	
Match Contributions To Date	Sum of all match and other funding on expenses that have not been denied or deleted	
Match Requirement	Total required match and other funding for grant	
Payments Made To Date	Sum of all payment authorizations with Paid status	This information pulls from <i>Post-Award tab >Cash Flow>Payment Authorizations</i> .
Pending Invoices	Sum of all payment requests that have not been paid or decided on	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.

Field/Date	Calculation/Source	Additional Information
Remaining Available Budget	= Remaining Available Grant-Funded Amount + Remaining Match Requirement	
Remaining Available Grant-Funded Amount	= Total Awarded Amount - payment requests with approved or pending status	
Remaining Match Requirement	= Total Match Requirement - Match Contributions To Date	
Total Budget	= Total Awarded Amount + Cash Match Amount + In-Kind Match Amount + Other Funding Amount	
Total Expenses	Sum of expenses that have not been deleted or denied	
Total Projected Budget	= Requested Amount + Cash Match Requirement + In-Kind Match Requirement + Other Funding 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
Cash Match	Sum of cash match expenses on the payment request for the category	
Expensed	Sum of grant-funded, match, and other funding expenses on the payment request for the category	
Grant Funded	Sum of grant-funded expenses on the payment request for the category	

Field/Date	Calculation/Source	Additional Information
Grant-Funded Remaining	= sum of category grant-funded budgeted line item amounts - sum of approved and pending category grant-funded expenses - sum of category expenses on this payment request	
In-Kind Match	Sum of in-kind match expenses on the payment request for the category	
Match	Sum of cash and in-kind match and other funding expenses on the payment request for the category	
Other Funding	Sum of other funding expenses on the payment request for the category	
Remaining Grant Balance	Remaining Available Budget from Grant Details	
Category Expenses Pop-Up		
Cash Match	Expense Cash Match	
Direct Cost	Expense Direct Cost	
In-Kind Match	Expense In-Kind Match	
Other Funding	Expense Other Funding	
Grant-Funded Remaining	= line item grant-funded amount - sum of approved and pending line item grant-funded expenses - sum of grant-funded expenses on this payment request	

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>Commitments</i> .

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	

Project Management

Project Details

Field/Date	Calculation/Source	Additional Information
Allocated Amount	Sum of budgeted amount on project line items	
Funded Amount	Sum of grant awarded amounts linked to the project	

Reports

Federal

Field/Date	Calculation/Source	Additional Information
SF-425 Template Report		
1. Federal Agency and Organizational Element to Which Report is Submitted	Federal Agency and Organizational Element field on the grant record	
2. Federal Grant or Other Identifying Number Assigned by Federal Agency	Identifying Number Assigned by Federal Agency field on grant record	
3. Recipient Organization Name	Name field on License Information	This information pulls from <i>Administration>License Information</i>
3. Recipient Street1	Address Line 1 field on License Information	This information pulls from <i>Administration>License Information</i>
3. Recipient Street2	Address Line 2 field on License Information	
3. Recipient City	City field on License Information	
3. Recipient State	State field on License Information	
3. Recipient Country	Country field on License Information	
3. Recipient ZIP / Postal Code	Zip Code field on License Information	
4a. DUNS Number	DUNS Number field on License Information	
4b. EIN	EIN / Federal Tax ID field on License Information	
5. Recipient Account Number or Identifying Number	Recipient Account Number field on the grant record	
8. Project/Grant Period From	Grant Start Date field on the grant record	

Field/Date	Calculation/Source	Additional Information
8. Project/Grant Period To	Grant End Date field on the grant record	
10a. Cash Receipts	Sum of all cash receipts for the grant.	
10d. Total Federal funds authorized	= Grant Awarded Amount - Cash Match	
10e. Federal share or expenditures	Sum of grant-funded amount of expenses	
10f. Federal share of unliquidated obligations	= Grant-funded amount - grant-funded expenses	
10i. Total recipient share required	= Cash Match + In-Kind Match	
10j. Recipient share of expenditures	Sum of match on expenses	

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 - Match - Other Funding	
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 - Match - Other Funding	

Field/Date	Calculation/Source	Additional Information
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	
Other Funding	Sum of budgeted other funding 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	
Other Funding	Sum of budgeted other funding 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
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	

Field/Date	Calculation/Source	Additional Information
Grant Funded	Sum of budgeted grant-funded allocations from line items with end date within date range	
Other Funding	Sum of budgeted other funding 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	