**Script - Post Award Settings**

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| Script  |
| Welcome to the AmpliFund grant maker training series focused on post award settings.    |
| After an award is created in AmpliFund an important step in the post award management process is configuring settings.  AmpliFund offers flexibility in a variety of permissions, due dates and reminders to coincide with your business processes.  In this video we’ll review the post award setting options for configuring reporting due dates, permission settings for recipient access to budgets and performance plans, default reminder settings and risk configuration.  |
| After logging into AmpliFund, click on Award Management and then Awards to access your list of available awards.  |
| From your awards list, click on the view award icon for the relevant award where you’d like to configure settings.  All post award settings are configured on a per-award basis, allowing you maximum flexibility based on varying requirements.  |
| Once on the award details page, click on post award then Settings.  Then Grant Settings.  We’ll go through each setting option one by one.  |
| Once on the grant setting page, click on the pencil in the upper right hand corner to edit the grant settings.  |
| The first option available is to set the budget reporting periods.  This sets the frequency with which your award recipient should submit their expenses, reporting period and corresponding payment request.  The available options are None, Monthly, Quarterly, Semi-Annually or Annually.  If you make a selection besides None, such as Monthly, which I’ve selected here then an additional option will pop up.  |
| The field will allow you to identify the due date for budget items after the end of the period selected.  So for example if a recipients monthly budget reporting period is due by the 15th of the following month, you would enter 15 in the box.  By populating the reporting period recipients will receive a reminder on their AmpliFund calendar and a corresponding task.  The task and calendar reminder populate for the recipient grant manager, as set by the recipient in their account.  If there is no recipient grant manager, the account owner would be assigned the task.  |
| The next setting option is the performance reporting period.  This setting indicates the due dates for performance or programmatic reporting from your recipient.  The cadence options are the same as the budget reporting period and once you select a cadence, the additional option will appear to add the due date.  |
| The final available option on the grant settings is to include a financial code if applicable.  |
| Once you’ve completed updates, click Save in the bottom right hand corner.  |
| Next, we’ll move onto the budget settings.  These are accessible in the same spot by going to Post Award, then Settings then Budget Settings.  |
| Once on the budget settings page, click on the pencil icon in the upper right hand corner to edit and configure the budget settings.  |
| The first section allows you to configure recipient permission for budget and expense creation.  Both drop downs have the same options which include  |
| Recipient and funder can edit, meaning that both your recipient and you as the funder can create or edit the budget categories or line items at any time.  Next is recipient can view and the funding organization can edit.  Finally the final option is recipient can edit and funder can view.  In the budget creation process you will have the option to lock categories or line items to restrict edit access to organizational admins at your organization only which can be used if you want the recipient to have access to edit some line items or categories but not all.  |
| The next section focuses around the default settings for matching for the award.  Matching, if enabled can be edited on a per line item or category basis if the requirements vary.  This budget setting allows you as the grant maker to identify the default for the entire budget.    |
| In the first drop down you can select if match is disabled, enabled or required.  If you set match as disabled all the other options in the budget setting related to match will disappear and match details cannot be entered in the budget.  If you set match as required, it will be required for all categories and line items.  The most flexible option is enabled, which enables match settings on all categories and line items.  |
| The next option is to identify how you want to use the match percentage for this award, the two options are as a percentage of the total grant budget, or the total direct cost, this includes match values.  Or you can set it as a percentage of the grant funded amount, meaning the amount you are funding to your recipient.  |
| The post award cash match amount will populate based on the value that is set in the award details page under Cash Match.  |
| The next drop down is the default cash match selection.  The options are to not default or to set as a percentage or amount.  This can be changed on a per line item basis.  |
| Based on your selection the next field will ask you to populate either a dollar amount or a percentage.  The value you populate will appear as the default match value on every line item created in the award budget.  The match amount or percentage can be changed on a per line item basis, however if many of the award budget line items have the same match value, this is an expedient way to set that value up front.  |
| The same options appear for both personnel in kind match and non-personnel in kind match.  If your award does not include in kind matching, you can mark the options as do not default.  |
| The next section allows you to configure indirect cost tracking.  If your award does not track indirect costs, you can leave this as unchecked and move onto the next section.  If you check the box for track in direct cost additional options will appear, including this indirect rate table.  You also have the capability within building the budget categories and line items to add indirect cost to specific line items or categories.  |
| There is a type drop down, these are different labels you can select, but they have no functional difference, then you can add a percentage for a particular date range.  If for instance the percentage increases in the second year of the award, you can add that by hitting the plus sign and entering a new line.  |
| Next, there are two options for calculating indirect costs, either by the direct cost, which includes the match or by the grant-funded amount which excludes the match.   |
| Finally, on indirect costs, you can have the system generate indirect costs Meaning indirect expenses will be automatically created when expenses are added against line items that generate indirect.  Or you can manually enter indirect costs.  Once you add expenses to a budget you cannot change any of the indirect budget settings, unless all expenses are deleted out.  |
| The next step is to add the budget categories for the award.  You can add all federal categories at once by having that selected in the drop down and hitting add or you can add one category at a time by putting the category name in the drop down then hitting add.  Remember budget categories pull from Administration>Lists>Budget Categories   |
| Our last portion of the budget settings is benefits.  You have two options for adding benefits, they can be added by Personnel OR Benefit Type.  Select benefit type and then add any applicable benefit types.  The personnel option is not enabled for recipient awards.  In this section you can also allow recipients to add benefit types.  The list of benefit types pulls from Administration>Lists>Benefit Types.  |
| Once you’ve completed configuring budget settings click save.  |
| Next, we’ll configure performance plan settings by going to Post Award, then Settings then Performance Plan settings.  |
| Within the performance plan settings options there are two key settings that drive recipient access.  First is performance plan creation and then achievement creation.  Performance plans outline the actual goals recipients should be reporting back to you as the grant maker on and achievements are the actions against those goals.  |
| The options in both drop downs are, recipient and funder can edit, recipient can view funder can edit and recipient can edit funder can view.  |
| The next section is the available goal types.  You can restrict the performance plan to only allow certain goal types.  All goal types are included by default, to remove a goal type uncheck the box next to the name.  For details on all performance plan goal types and required fields, please visit our support site and review our performance plan goals video or other documentation.  |
| Once you’ve configured performance plan settings click save.  |
| Next we’ll move onto reminders.  To access the reminders go to Post Award then Settings then reminders.  You can leverage reminders to keep recipients on top of important reporting due dates and tasks.  AmpliFund offers you the ability to configure up to 3 automatic reminders for budget reporting periods, performance plan reporting periods and assigned tasks.  Based on the cadence you configure, AmpliFund will automatically send email reminders to responsible individuals.    |
| There are options to set reminders for tasks, budget reporting periods and performance reporting periods.  If you want default reminders to apply to budget and performance reporting periods, be sure to set up the reporting period cadence under grant settings first.  |
| The drop down indicates the days before the due date the reminder would send.  We have a detailed video available on our support site on reminders which walks through how each of these function.  |
| Once you’ve configured reminders be sure to click save.  |
| The final option under settings is risk configuration.  Risk configuration allows you as the grant maker to set thresholds that can be set for monitoring award performance related to Reporting risk, budget risk, and performance plan risk.  For detailed information on how to set up risk configuration reference our risk configuration video available on the AmpliFund support site.  |
| Through this grant maker training series you’ve learned about the post award settings options.  Should you have additional questions, please reference our support site.  Thank you!    |