Recipient Training Part 2

Illinois Office of Attorney General
Agenda

• Understanding AmpliFund Basics
• AmpliFund Navigation
• Creating Users
• Updating Award Details
• Achievements
• Entering Expenses
• Reporting Periods
• Payment Requests
• Cash Receipts
• Managing Your Award
  - Amendments
  - Tools
  - Reports and Analytics
• Support

*Please refer to the AmpliFund Recipient User Guide for more information.
AmpliFund Overview

SaaS based grants management solution

• No installation for users
• AmpliFund is accessible anywhere you have an internet connection

AmpliFund provides a recipient organization with the ability to share information and report back to the granting organization
Funder-Recipient Interaction Overview

**Funder Activities**
- Create Grant
- Add Budget and Performance Plan
- Send Invitation to AmpliFund
- Review Reporting Period (reject if necessary)
- Approve/Reject Payment Request

**Recipient Activities**
- Login to AmpliFund
- Add other Staff and invite as needed
- Specify Recipient Grant Manager
- Enter Expenses against Budget & Achievements against Goals
- Create and Submit Reporting Period
- Create and Submit Payment Request

Award activation
Hello Jane Test,

You are receiving this notification because your organization has been given an award from AmpliFund Training: Lifecycle.

This award of 1 years 0 months 0 days begins on 5/1/2021.

If you currently use AmpliFund, please login to see the details of your award and get started.

If you have never used AmpliFund, please use this link to set your password and login.

Regards,
AmpliFund Administrator
AmpliFund Training: Lifecycle

- AmpliFund generated emails from no-reply@gotomygrants.com
- If you used AmpliFund to apply for the award, use the same email address and password used to login to the Applicant Portal
- If you do not receive your Award Activation email, check your spam folder
- Links in AmpliFund emails expire; contact your Grant Monitor if you need to have your Award Activation email resent
Creating a Password & Logging In

1. Click the **link** in the invitation email
2. Enter and confirm a password
3. Click the **Submit** button
4. Enter email and password in the Login window and click the **Login** button
5. Click the **I Accept** button to accept the AmpliFund terms of use
In-Product Review

www.gotomygrants.com
Post Implementation Support

Submit a support ticket:
support@amplifund.Zendesk.com

Visit the support portal:
https://amplifund.zendesk.com

Supported Browsers:
• Google Chrome (current supported releases)
• Mozilla Firefox (current supported releases)
• Microsoft Edge (current supported releases)
• Microsoft IE 11 +
• Apple Safari 10+
1. Go to https://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. A welcome email from support@zendesk.com will be sent to you via email
8. Click the link to set your password
Reference Materials & URLs

Reference Materials
• Recipient User Guide
• Recipient Step by Step Guide
• Today’s Recording

AmpliFund URLs
• www.gotomygrants.com
• https://amplifund.zendesk.com
Question & Answer
Thank You

www.gotomygrants.com
Appendix

www.gotomygrants.com
Appendix Outline

• Understanding AmpliFund Basics
• AmpliFund Navigation
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*Please refer to the AmpliFund Recipient User Guide for more information.
Understanding AmpliFund Basics
1. Left Navigation—shows on every page

2. User Navigation—dropdown includes options for account information, change password, message center, support, terms and conditions, applicant portal (if applicable), and logout

3. Options Toolbar—displays icons to perform functions available on the current page, icons vary based on page

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Creating Users

1. Open **Administration** > **System Security** > **Users**

2. Click the **+ icon in the top right hand corner** to create a User

3. Select the **User’s Email Preference**, and **User role**

4. Enter the User’s **First Name**, **Last Name**, and **E-Mail Address**

5. Click the ‘**Create**’ button
Creating Users

Subscribe to Daily Emails
Subscribe to Weekly Emails

Applicant Portal Access
- Set to Yes to provide a user in your organization with access to the application(s) submitted by your organization

Role*
- **Organization Administrator**
  - Full view and edit access to your organization’s AmpliFund account
- **Executive**
  - View only access to your organization’s AmpliFund account
- **Department User (Salary OR No Salary)**
  - Only has access to budget or performance plan items to which you assign the user as the Responsible Individual
Sending an Invitation to a User

1. Click the in the Icon Bar

2. In the confirmation pop-up window, click Send Invitation

Note: An Organization Administrator can resend the invitation email to a user by going to Administration > System Security > Users. Click the envelope icon next to the User’s name and confirm.
Updating and Managing Your Award
1. Go to **Grant Management > All Grants**
2. Click the **Name** of the grant
3. On the **Details** tab, click the ‘pencil’ icon to edit
4. Update the Recipient Grant Manager name
5. Click the **Save** button in the right corner of the screen

Grant Budgets have already been created in your account.

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Amendments

1. Go to Grant Management > Grants > select Grant > Post-Award > Management > **Amendments**
2. Click the Create icon in the Icon Bar
3. Select the **Category Budget**
4. Complete the dynamic fields based on type of amendment
5. Complete and attach the **Amendment Request Forms**
6. Click the **Save** button
Tools

- Email Manager
- Tasks
- Documents
- Notes

*Tools are available on several record types:*
  - Organizations
  - Individuals
  - Staff
  - Grants/Awards
# Reports

<table>
<thead>
<tr>
<th>Post-Award Reports</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grant Budget Variance</td>
<td>Provides a grant’s variance between the planned grant budget and submitted expenses for a specified time period</td>
</tr>
<tr>
<td>Grant Expense Detail</td>
<td>Provides visibility into expenses entered against a specified grant</td>
</tr>
</tbody>
</table>
Analytics

A Test FY22 Continuation Award (CFDA# ___) – Approved

Details
- Grant Manager: Jane Doe
- Start Date: 3/1/2021
- End Date: 6/30/2022
- Closeout Date: 9/30/2022
- Risk: Low
- Performance: Low
- Reporting: Low

Quick Create
- Amendments
- Expenses
- Payment Authorizations

Grant Detail Analytics
- Risk: Low
- Awarded Amount: $150,000.00
- Remaining Balance: $144,950.00

Category Budget
- Total Budget
- Total Actual
- Contractual
- Personnel
- Travel
- Supplies
- Indirect
Expenses, Reporting Periods and Payment Requests
Tracking Expenses on Budget Line Items

1. Go to **Activity > Expenses**
2. Click the **Create Expense (+) icon**
3. Select the **Category** and **Line Item** to add expense to
4. Add the **Direct Cost** and **Expense Date** (date on invoice)
5. Mark the **Expense Status** as **Reviewed**
6. Add the **Description** (optional but required if a corrected expense)
7. **Upload File(s)** (optional)
8. Click the **Create** button
Tracking Achievements on Performance Goals

1. Go to Activity > Achievements
2. Click the Create Achievement (+) icon
3. Add the Date and Number Achieved
4. Add the Notes (optional)
5. Upload File(s) (optional)
6. Click the Create button
Creating Reporting Periods

1. Go to Grant Management > Grants > select Grant > Post-Award > Management > Reporting Periods
2. Click the Create icon in the Icon Bar
3. Select the Expenses checkbox under Types of Reporting Periods to include
4. Choose the Period of Time
5. Click the Save button

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Closing Reporting Periods

1. Go to Grant Management > Grants > select Grant > Post-Award > Management > Reporting Periods

2. Verify Expenses are correct

3. Click the Close button

4. At the confirmation pop-up window, click Close
Creating Payment Requests

1. Go to Grant Management > Grants > select Grant > Post-Award > Management > Reporting Periods

2. Click on the Create Payment Request icon next to the corresponding Closed Reporting Period

3. Add a Payment Request Name.

4. Enter Date Created – today’s date
Creating Payment Requests

7. Verify information is correct

8. Enter **Requested Amount**
   - Must match Net Total

9. Click the **Create/Submit** button
Creating Cash Receipts

1. Go to Grant Management > Grants > select Grant > Post-Award > Management > **Cash Receipts**

2. Click the **Create** icon in the Icon Bar

3. Enter Required Fields
   - Receipt Name
   - Amount
   - Related Payment Request

4. Click **Create**