Recipient Training

November 29, 2017

AmpliFund Grant Management

StreamLink™ SOFTWARE

Session Goal & Agenda

Goal: *Familiarize attendees with Recipient functionality*

- **Understanding AmpliFund Basics & Navigation**
  - AmpliFund Overview
  - Process Overview
  - Award Activation Email Notification
  - Navigation Elements & Calendar
  - Grant Management & Overview
  - Activity Section
- **Creating Staff & Users**
  - Creating Staff
  - Converting Staff to a User
  - Sending an Invitation to User
  - Creating a Password & Logging In
  - Updating User Settings
- **Updating Grant Details**
  - Adding the Recipient Grant Manager
- **Managing a Budget**
  - Accessing the Budget
  - Adding Line Items
  - Tracking Expenses on Budget Line Items
  - Security for Tracking Expenses on Budget Line Items
  - Creating & Closing Budget Reporting Periods
- **Creating & Submitting Payment Requests**
  - Payment Request Overview
  - Creating Payment Requests
  - Submitting Payment Requests
  - Marking Payment Requests as Paid
  - Email Notifications
- **Creating & Managing a Performance Plan**
  - Accessing the Performance Plan
  - Adding Performance Goals
  - Tracking Achievements on Performance Goals
  - Security for Tracking Achievements on Performance Goals
  - Creating & Closing Performance Reporting Periods
- **Support Procedures & Details**
  - Support Procedures
  - Creating an AmpliFund Support Site Account
  - Accessing AmpliFund Documentation
  - AmpliFund Reference Materials and URLs
  - Contacting AmpliFund Support

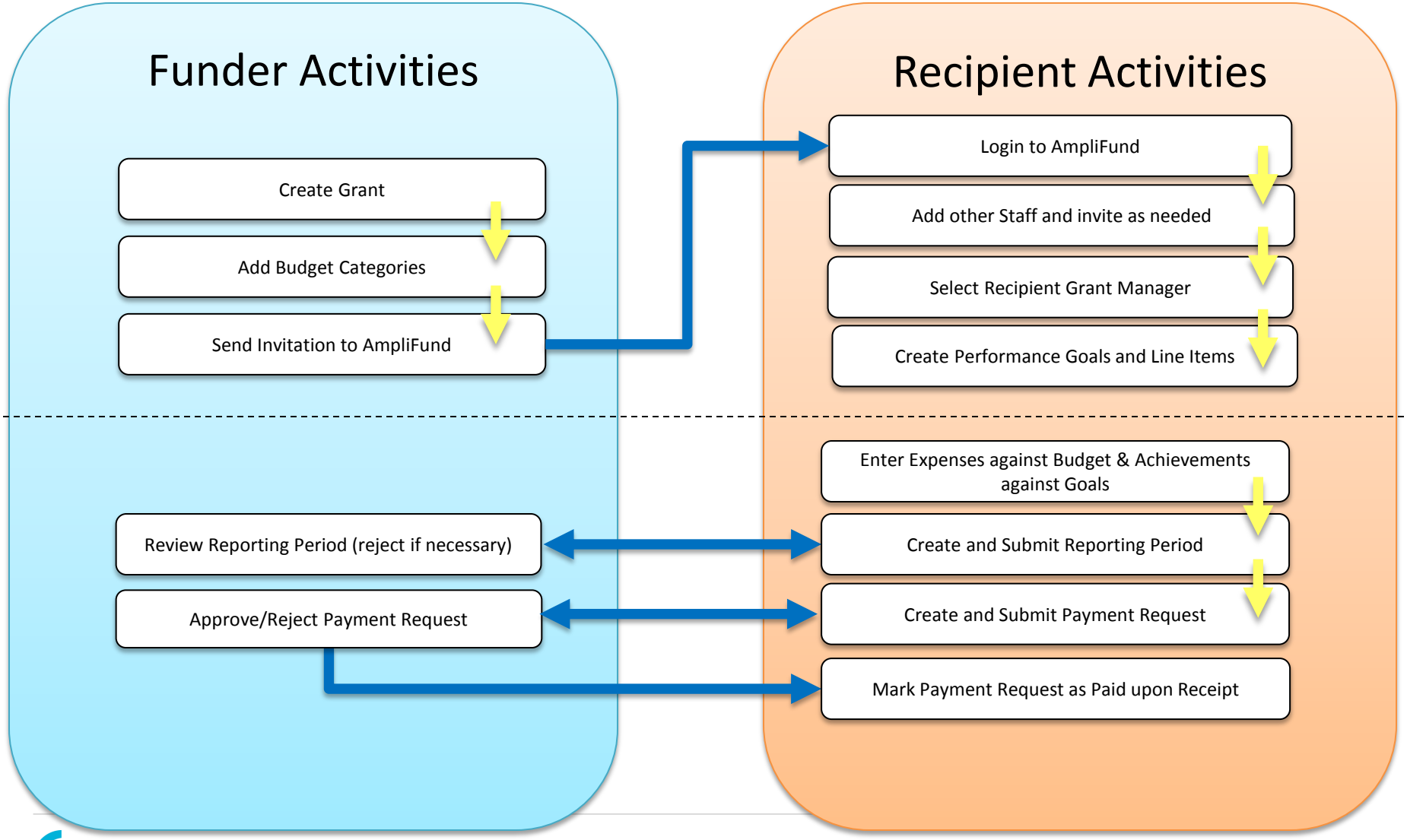
Understanding AmpliFund Basics & Navigation

- AmpliFund Overview
- Process Overview
- Award Activation Email Notification
- Navigation Elements & Calendar
- Grant Management & Overview
- Activity Section

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

Process Overview



AmpliFund Grant Management

Award Activation Email Notification

Award Activation Email

Award Activation Inbox x

no-reply@gotomygrants.com via gotomyboards.com 8:25 AM (1 minute ago)
to me

AmpliFund

Hello P1-Applicant1,

You are receiving this notification because your organization's application has been selected for the MB Test_COJ – FY 2017 Public Service Grant Application opportunity from MB Test Company.

This award of 1 years 0 months begins on 10/1/2016.

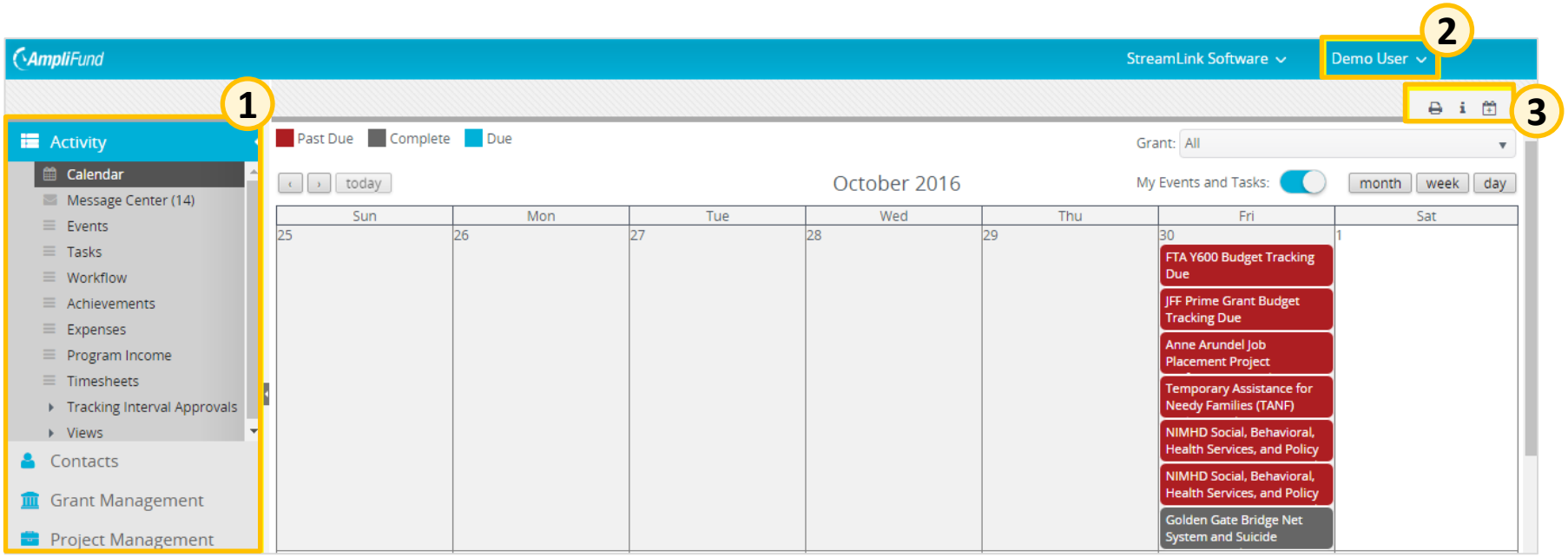
To see the details of your award, please login to AmpliFund to get started.

Regards,
AmpliFund Administrator
P1-TestOrg1

AmpliFund™, a Grant Management System developed by StreamLink Software, is the premier tool used by Non-Profit organizations to manage Grants, Assignments, and Compliance. To learn about StreamLink Software's products and services, please visit StreamLink Software.

- AmpliFund generated emails come 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 manager if you need to have your Award Activation email resent

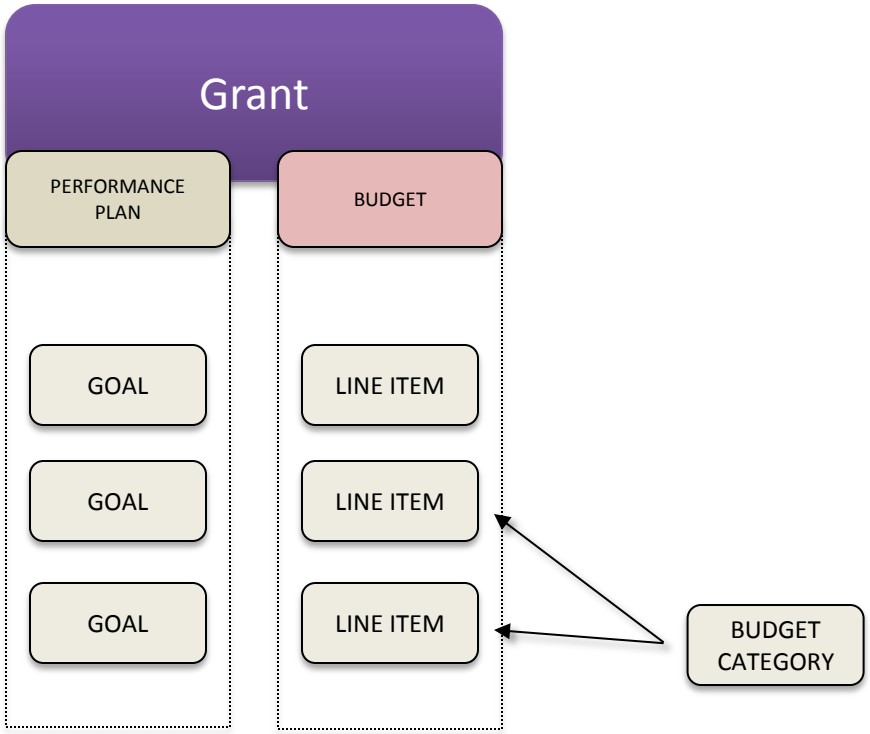
Navigation Elements & Calendar



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, and logout
3. **Options Toolbar –** displays icons to perform functions available on the current page, icons vary based on page

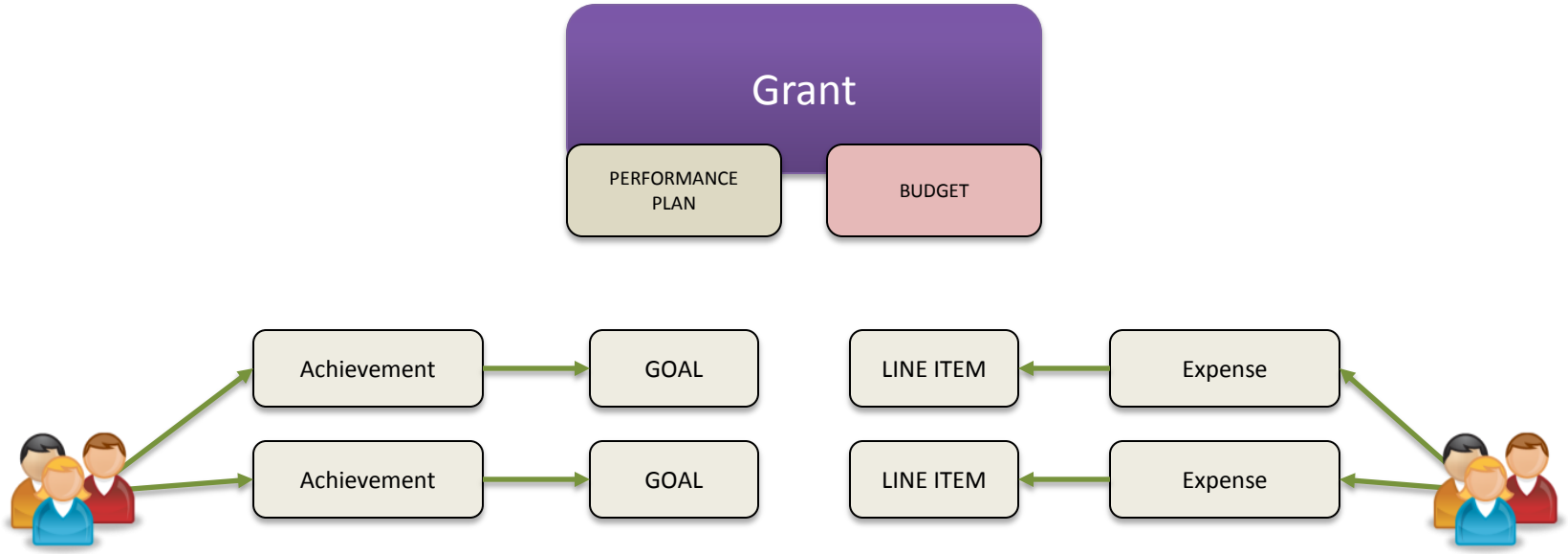
Grant Management

Plan Budget and Performance



Grant Management

Track Expenses and Achievements



Activity Section

User Specific Section: non-Organization Admin users see only the items they are responsible for in the Activity section.

Page	Description
Calendar	Every user's homepage; each user can view items assigned to them on the calendar
Message Center	Provides access to messages sent through AF
Events	Important dates in a grant's lifecycle as entered on a grant details page; events do not require any action to be taken; they simply serve as reminders
Tasks	Tasks track the completion of important grant management-related responsibilities that are not achievements or expenses
Achievements	Progress accomplished against a planned grant programmatic goal
Expenses	Tracks dollars spent against a planned grant budget line item. Expenses are added towards the defined grant budget line items
Reporting Periods	Segmented periods of a grant corresponding to funder reporting requirements

Creating Staff & Users

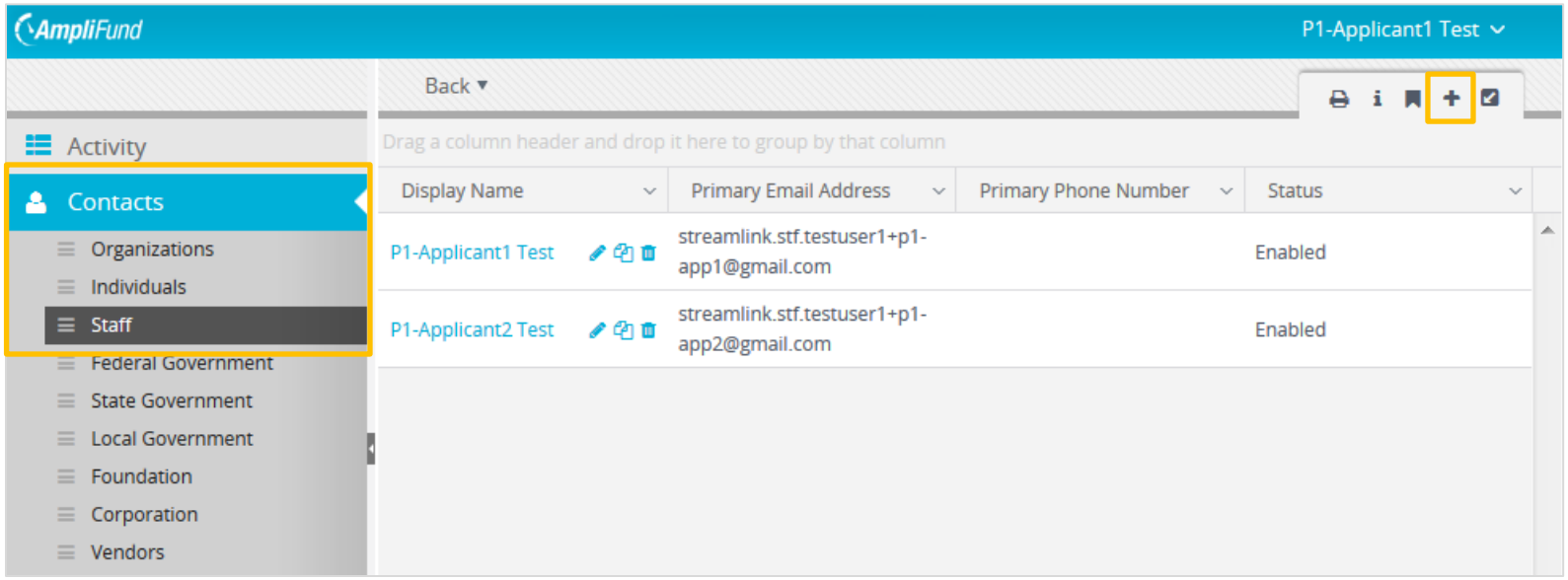
- Creating Staff
- Converting Staff to a User
- Sending an Invitation to a User
- Creating a Password & Logging In
- Updating User Settings

Creating Staff

Users who had unique logins to the Applicant Portal are automatically created as Staff and Users in AmpliFund

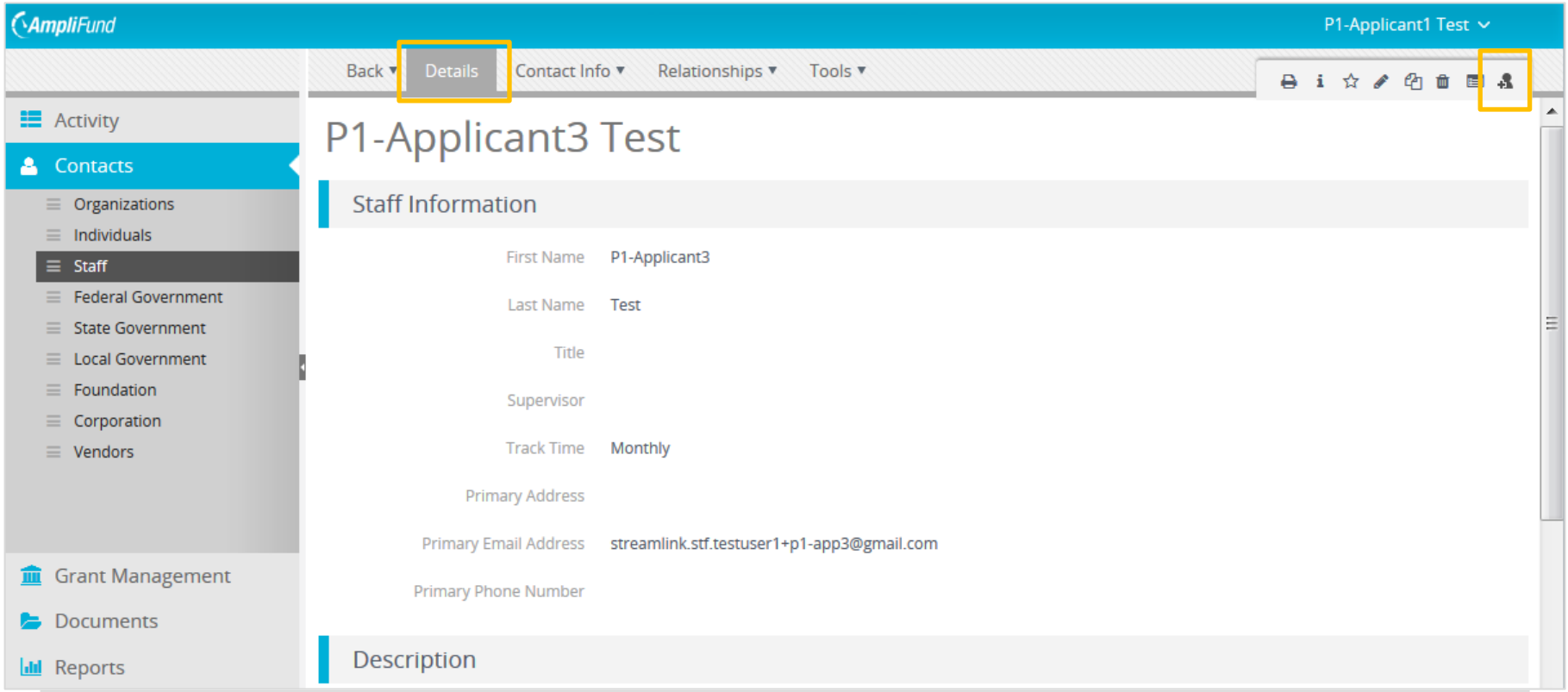
1. Go to ***Contacts > Staff***
2. Click the **Create** icon
3. Enter **Staff Information**

   Note: Required fields are marked with an asterisk (*)
4. Confirm that **Status*** is set to **Enabled**
5. Click the **Create** button in the right corner of the screen



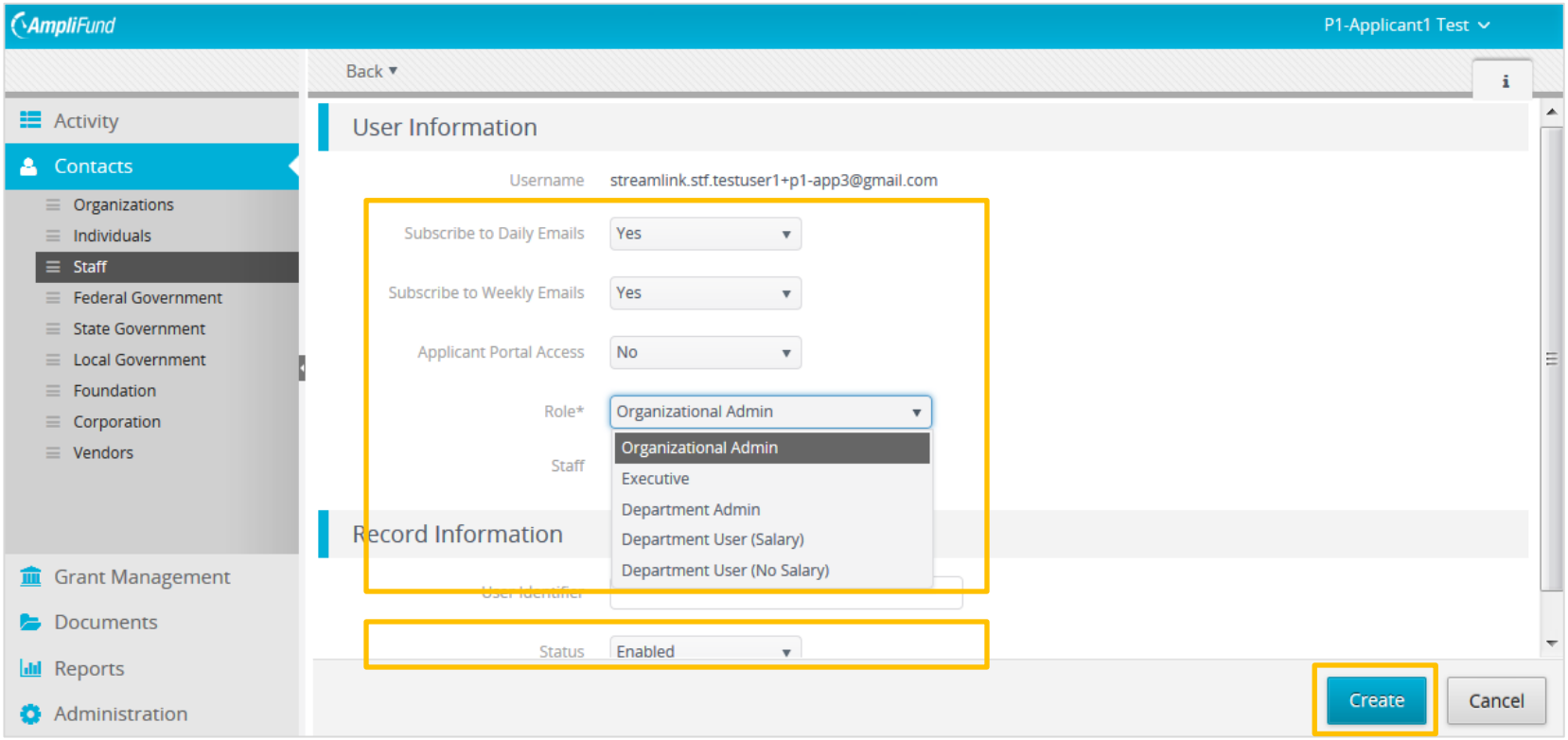
Converting Staff to a User

1. Click the **Create User** icon on the staff **Details** tab
2. Update the **User Information** settings for emails, applicant portal access, and role
3. Confirm that **Status** is set to **Enabled**
4. Click the **Create** button in the right corner or the screen



Converting Staff to a User *(continued)*

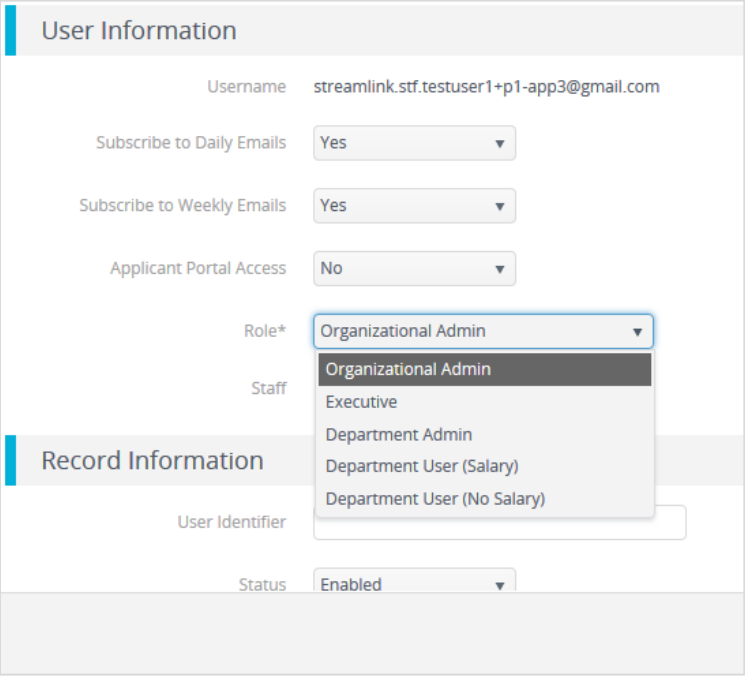
1. Update the **User Information** settings for emails, applicant portal access, and role
2. Confirm that **Status** is set to **Enabled**
3. Click the **Create** button in the right corner or the screen



Converting Staff to a User *(continued)*

User Information:

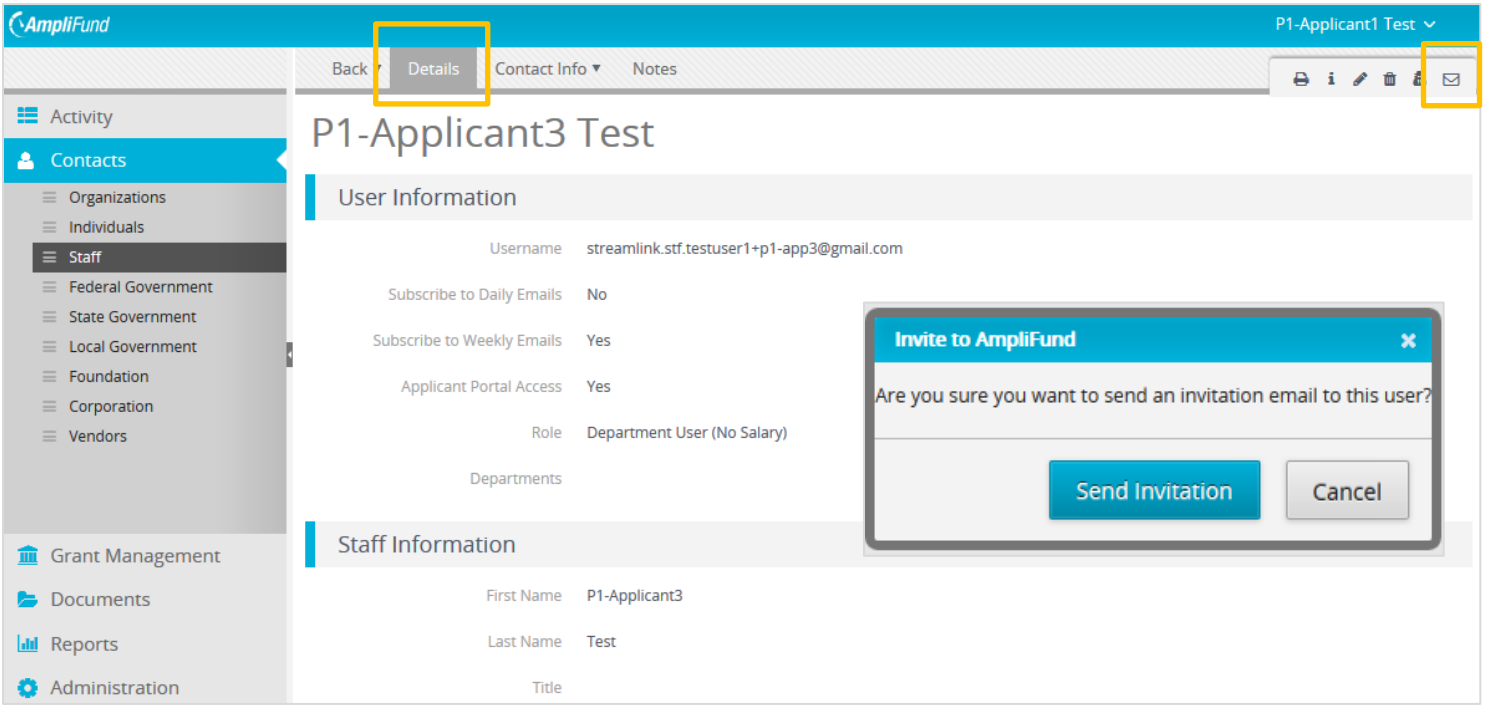
- **Subscribe to Daily Emails**
- **Subscribe to Weekly Emails**
- **Applicant Portal Access**
  - Set to **Yes** to provide a user in your organization with access to the application(s) submitted by your organization
- **Role***
  - **Organization Admin**
    - Full view and edit access to your organization's AmpliFund account
  - **Executive**
    - View only access to your organization's AmpliFund account
  - **Department User (No Salary)**
    - Only has access to budget or performance plan items to which you assign the user as the Responsible Individual



Note: *Department Admin and Department User (Salary) roles are not relevant to the manner in which recipients will utilize AmpliFund.*

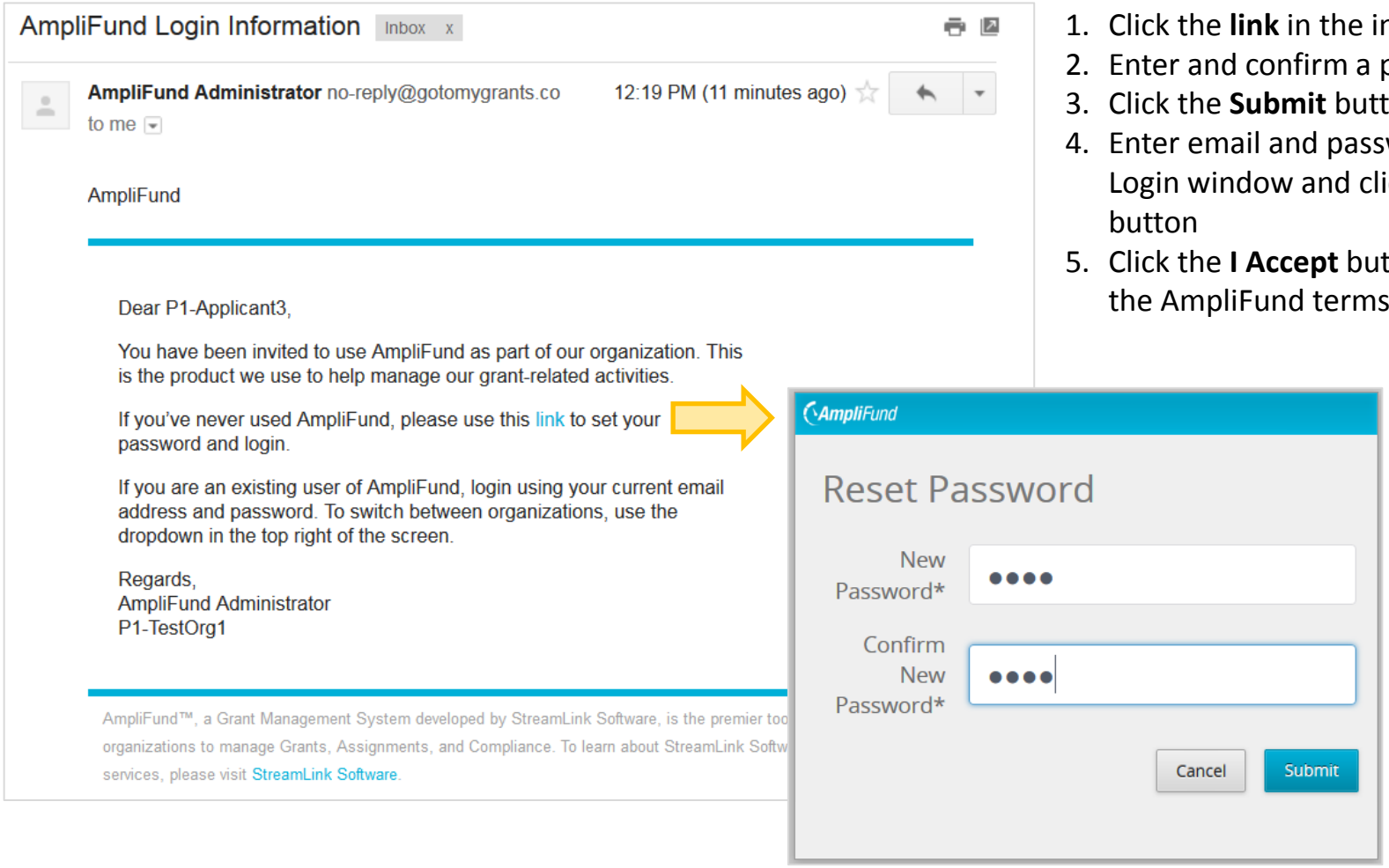
Sending an Invitation to a User

1. Click the **Invite to AmpliFund** icon on the user **Details** tab 
2. Click the **Send Invitation** button in the Invite to AmpliFund pop-up to send the invitation email to the user



Note: An Organization Administrator can resend the invitation email to a user by going to **Administration > Users**. In the user grid, hover over a user's name and select **Send Invitation** from the drop-down menu.

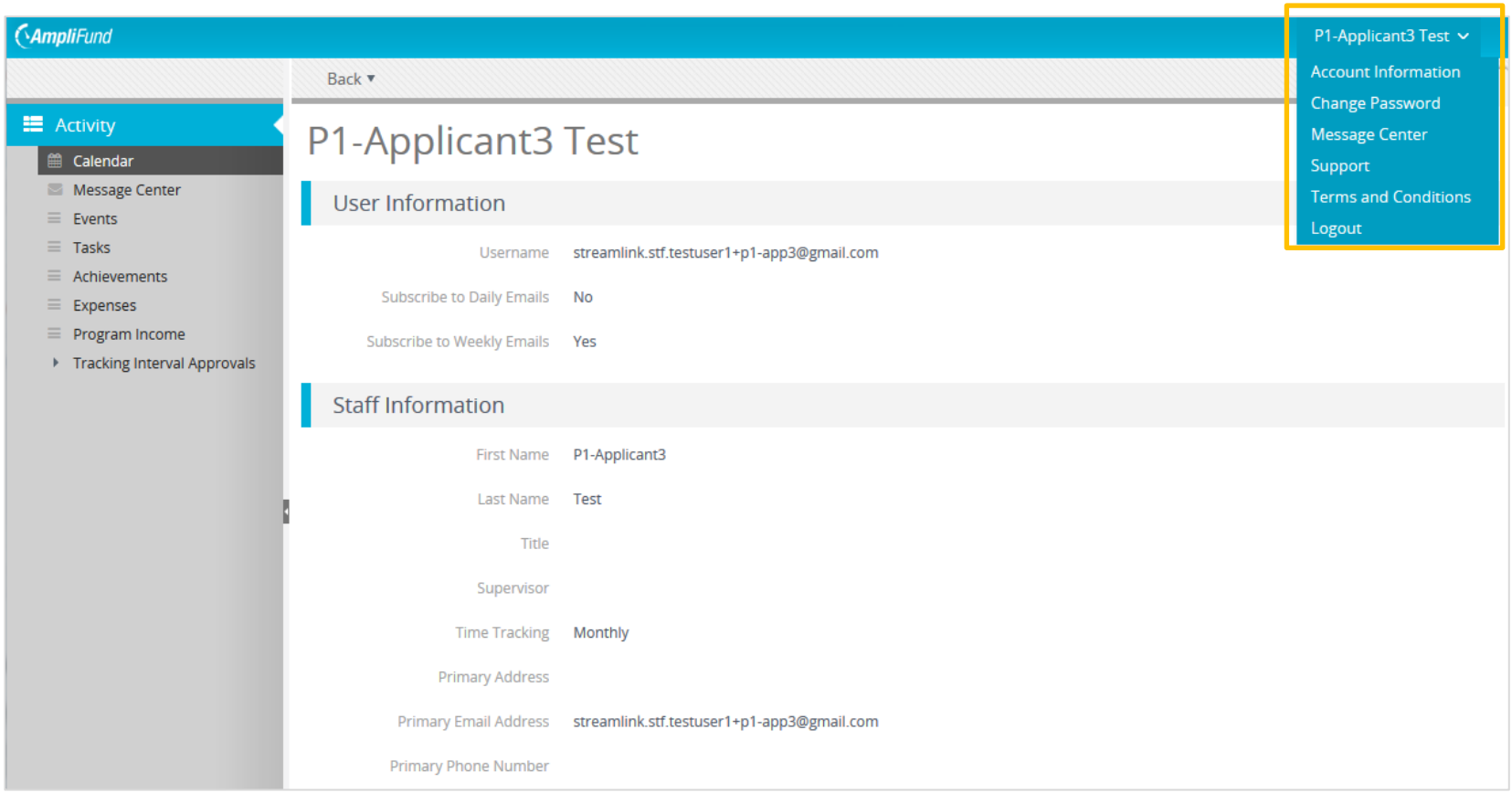
Creating a Password & Logging In



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

Updating User Settings

The **user navigation** is accessible in the top right corner of the screen. From this menu, users are able to update their account information, change their password, or submit a support ticket. The user menu also includes the logout function.



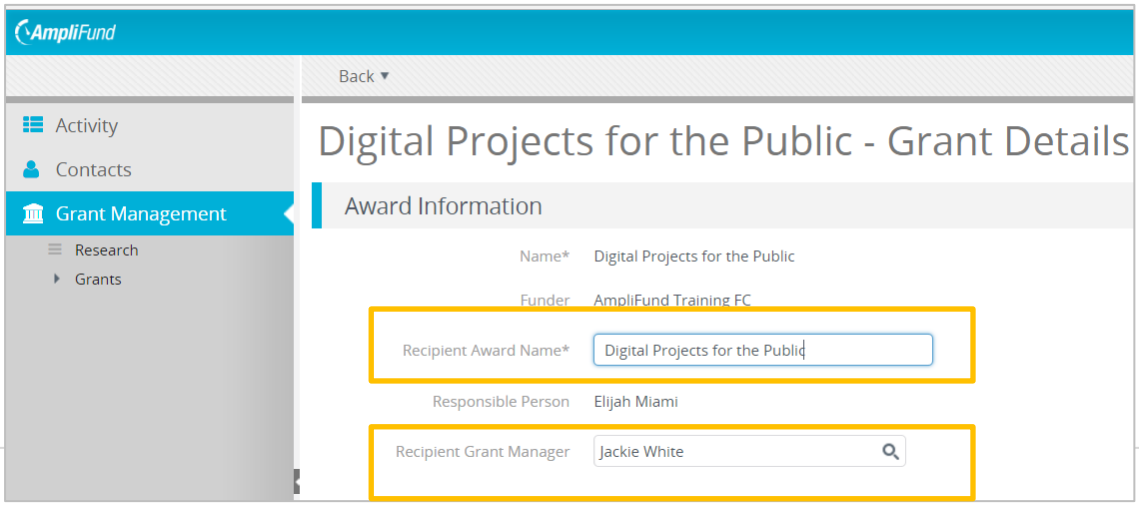
Updating Grant Details

- Adding the Recipient Grant Manager

Updating Grant Details

1. Go to ***Grant Management > All Grants***
2. Click the **Name** of the grant
3. On the grant **Details** tab, click the **Edit** icon 
4. Update the **Recipient Award Name** to reflect your program's name
5. Add the **Recipient Grant Manager** (required)

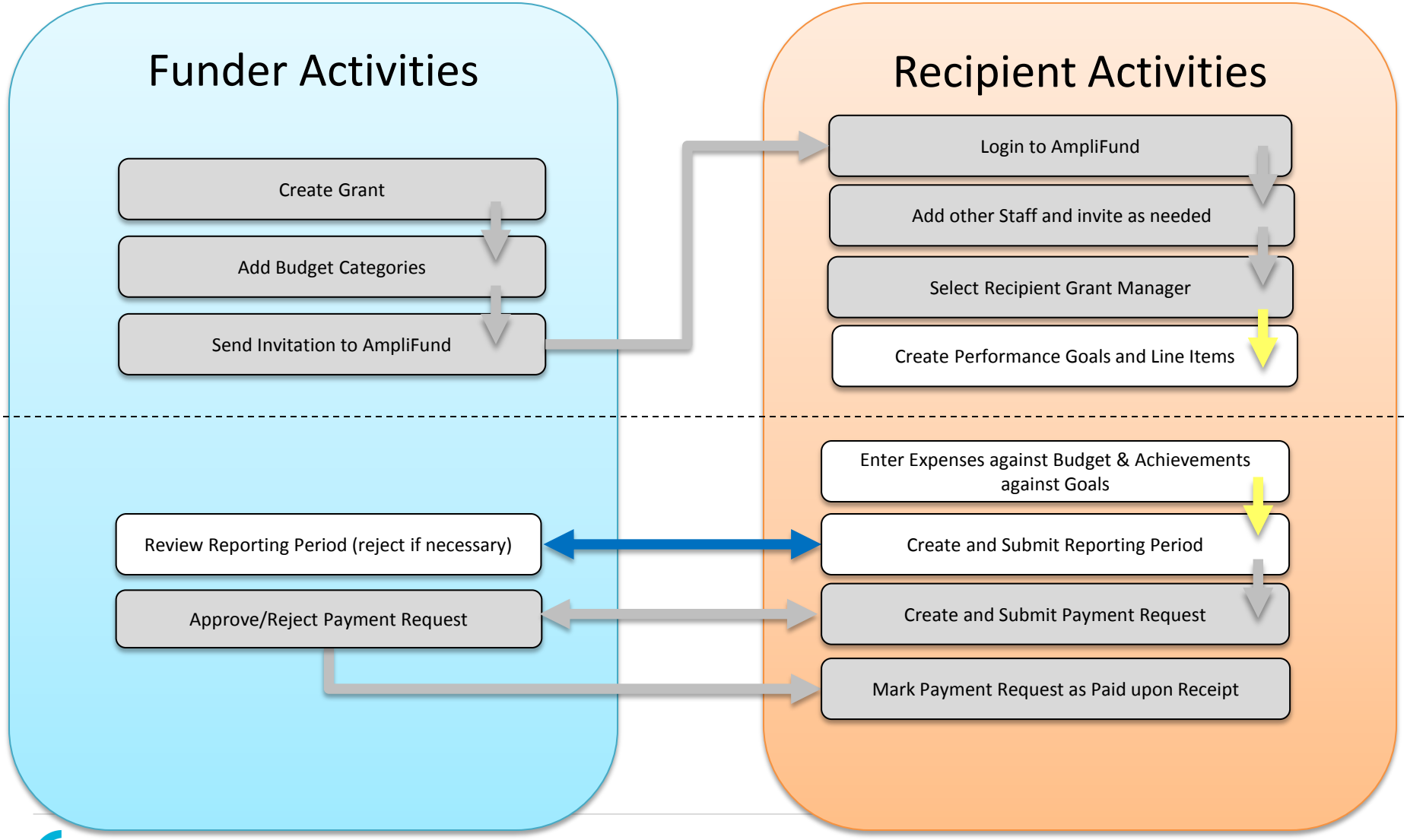
   Note: This person must be added as staff in the organization's AmpliFund account before the person can be selected as the Recipient Grant Manager. The Grant Manager will have full edit access to this grant in AmpliFund and will receive grant-related reminders.
6. Click the **Save** button in the right corner of the screen



Accessing & Managing a Budget

- Accessing the Budget
- Adding Line Items
- Tracking Expenses on Budget Line Items
- Security for Tracking Expenses on Budget Line Items
- Creating & Closing Budget Reporting Periods

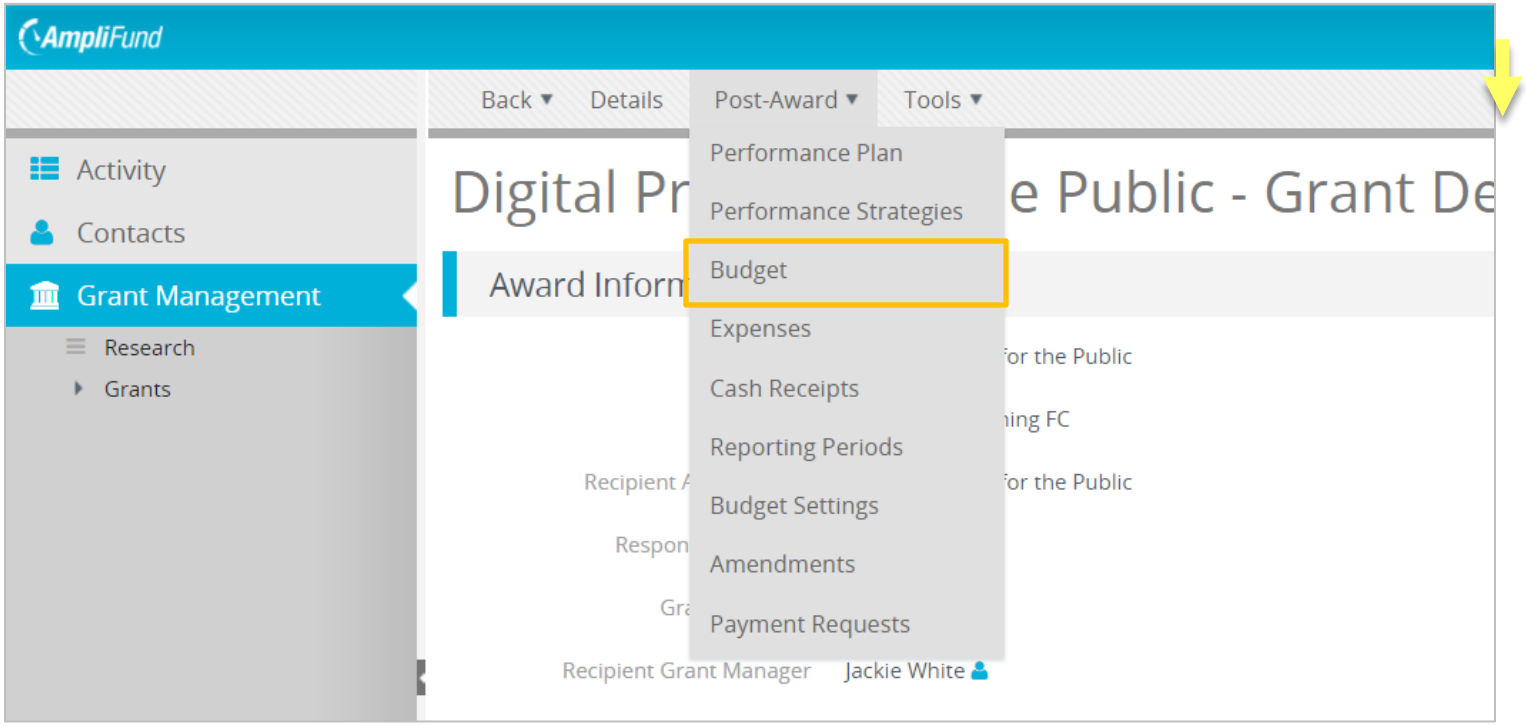
Budget and Reporting Process Overview



AmpliFund Grant Management

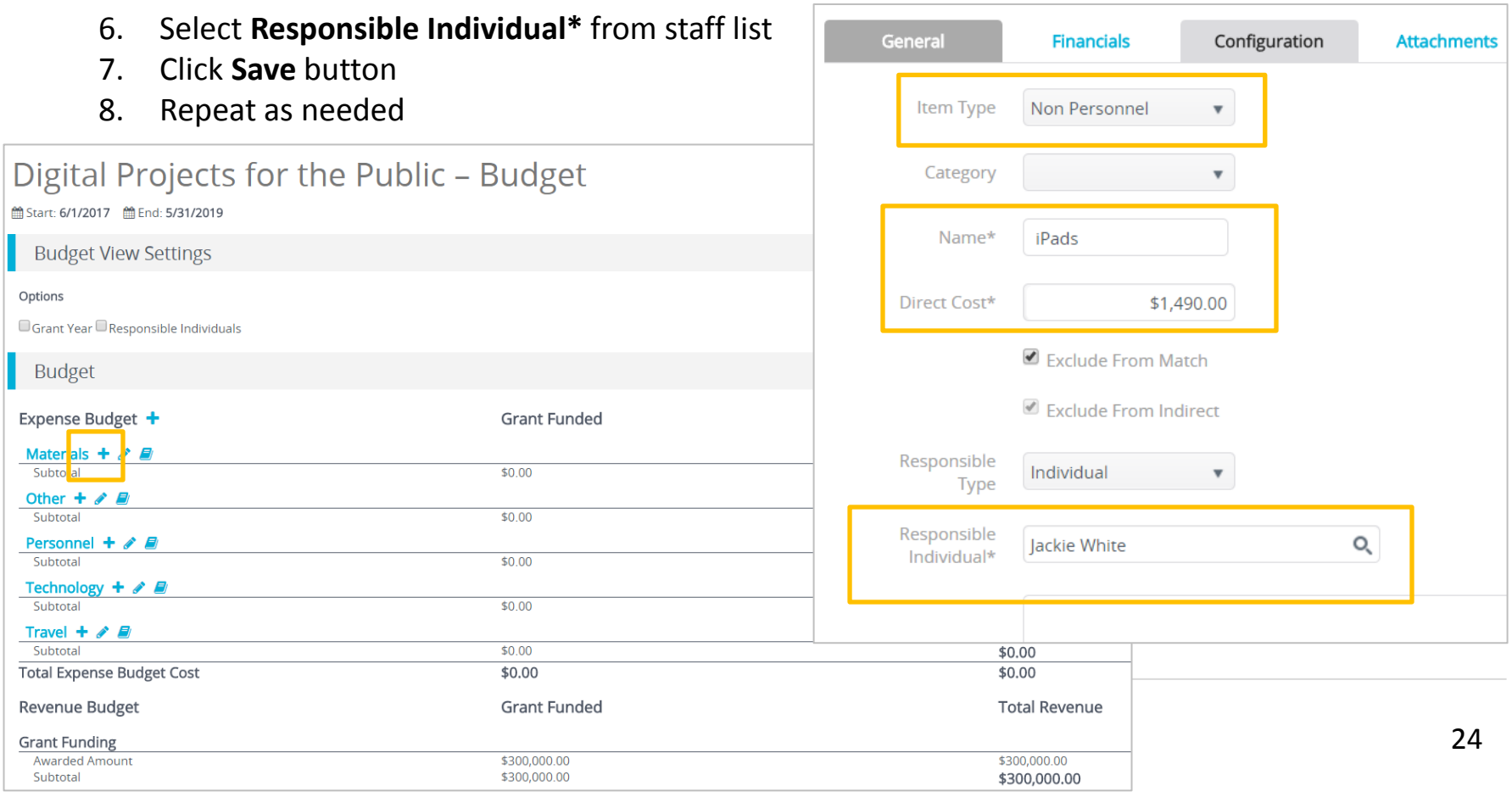
Accessing the Budget

1. Go to ***Grant Management > All Grants***
2. Click the **Name** of the grant
3. From the **Post-Award tab**, select **Budget**



Adding Line Items

1. Go to ***Grant Management > Grants > Click Grant Name > Post-Award menu > Budget***
2. Click the **Create Line Item (+)** icon next to a category name
3. Select *Line Item Type: Non-Personnel*
4. Add Line Item **Name***
5. Enter Line Item **Direct Cost***
6. Select **Responsible Individual*** from staff list
7. Click **Save** button
8. Repeat as needed



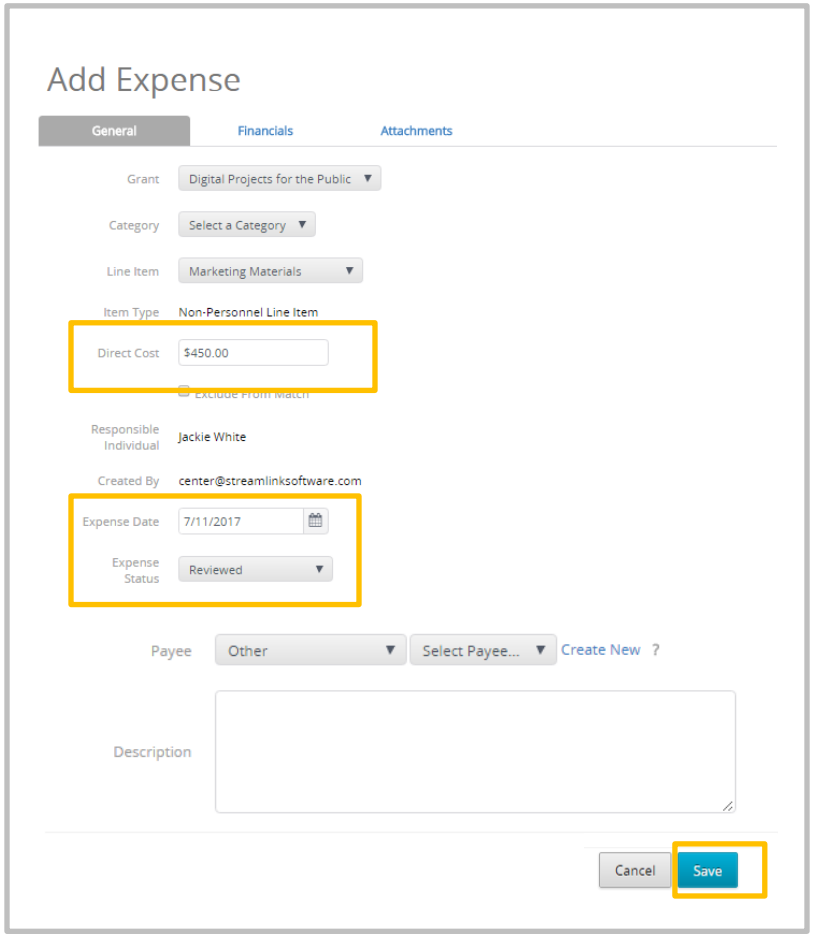
Tracking Expenses on Budget Line Items

Option 1:

1. Go to ***Activity > Expenses***
2. Click the **Create Expense (+)** icon
3. Add **Expense Date** and **Total Direct Cost**
4. Mark the **Expense Status** as *Reviewed*
5. Add **Description** and **Upload File(s)** (optional)
6. Click **Save**

Option 2:

1. Go to ***Grant Management > Grants > All Grants***
2. Click on the award Name
3. From **Post-Award tab**, click **Budget**
4. Click the **View Expenses ($)** icon next to a line item
5. Click the **Create Expense (+)** icon in the *Icon Bar*
6. Add **Expense Date** and **Total Direct Cost**
7. Mark the **Expense Status** as *Reviewed*
8. Add **Description** and **Upload File(s)** (optional)
9. Click **Save**



Security for Tracking Expenses on Budget Line Items

Option 1:

1. Go to ***Activity > Expenses***
2. Click the **Create Expense (+)** icon
3. Add **Expense Date** and **Total Direct Cost**
4. Mark the Expense Status as **Reviewed**
5. Add **Description** and **Upload File(s)** (optional)
6. Click **Create**

Who can access Option 1:

- Organization Administrator
- Grant Manager
- Department User (No Salary) who is also the Responsible Individual on the budget line item

Option 2:

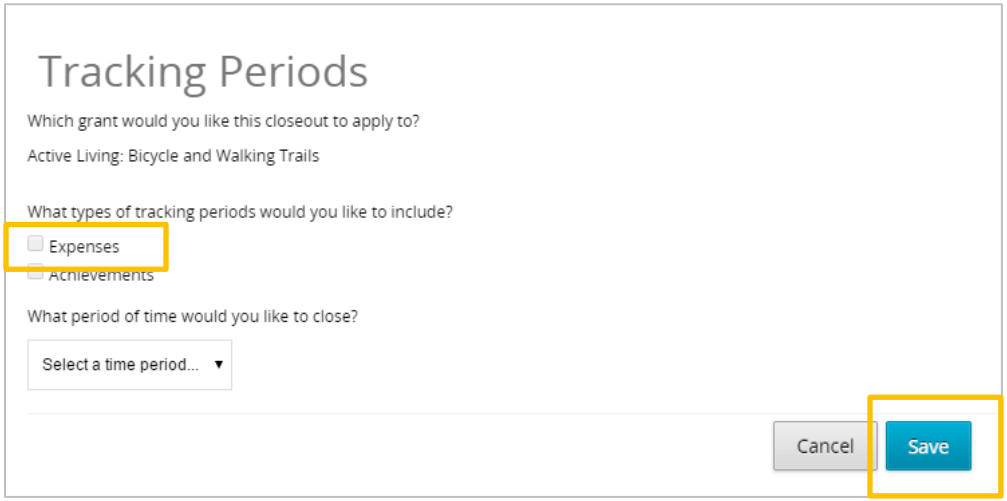
1. Go to ***Grant Management > Grants > All Grants***
2. Click on the award Name
3. From **Post-Award tab**, click **Budget**
4. Click the **View Expenses ($)** icon next to a line item
5. Click the **Create Expense (+)** icon in the *Icon Bar*
6. Add **Expense Date** and **Total Direct Cost**
7. Mark the **Expense Status** as *Reviewed*
8. Add **Description** and **Upload File(s)** (optional)
9. Click **Create**

Who can access Option 2:

- Organization Administrator
- Grant Manager

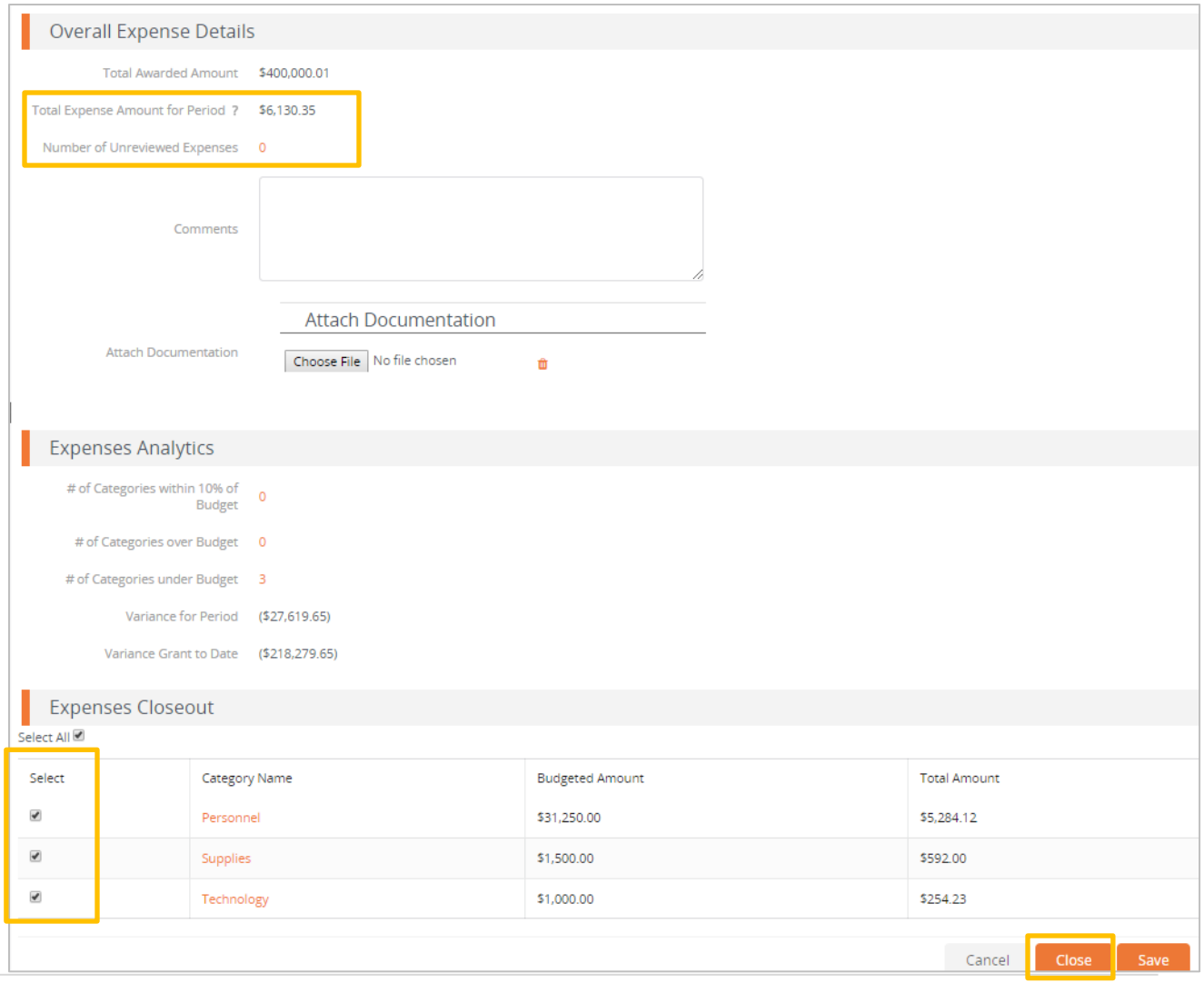
Creating & Closing Budget Reporting Periods

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



Creating & Closing Budget Reporting Periods

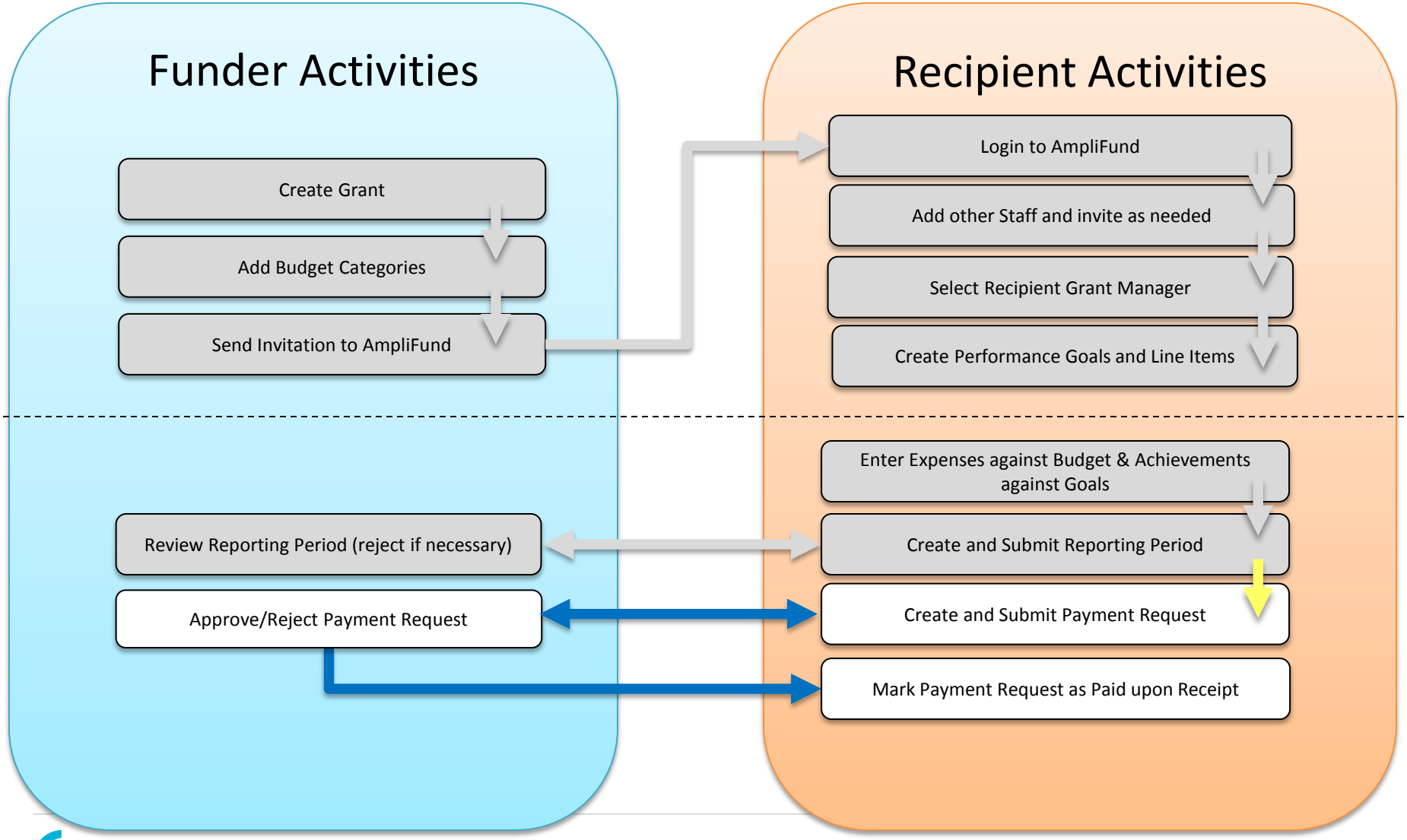
6. Review Reporting Period Details, including any Unreviewed Expenses
7. Select Expenses to Close Out
8. Click the **Close** button
9. At the confirmation pop-up, click **Close**



Creating & Submitting Payment Requests

- Payment Request Overview
- Creating Payment Requests
- Submitting Payment Requests
- Marking Payment Requests as Paid
- Email Notifications

Payment Request Process Overview



AmpliFund Grant Management

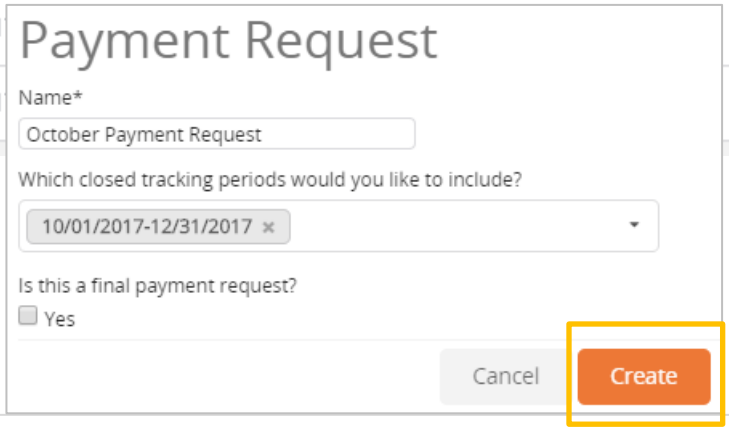
Payment Request Overview

- Request reimbursement from funder for expenses
- Are linked to Closed Expense Reporting Periods
  - Expenses contained in Closed Reporting Periods pull into linked Payment Request
- Funder can approve or reject
- Payment Requests can be retroactively submitted for previous months

Creating Payment Requests

1. Go to ***Grant Management > Grants > select Grant > Post-Award > Reporting Periods***
2. Click on the **Create Payment Request** icon next to the corresponding Closed Reporting Period
   Note: each Closed Reporting Period can only be linked to one Payment Request
3. Add a Payment Request **Name**
4. Click the **Create** button

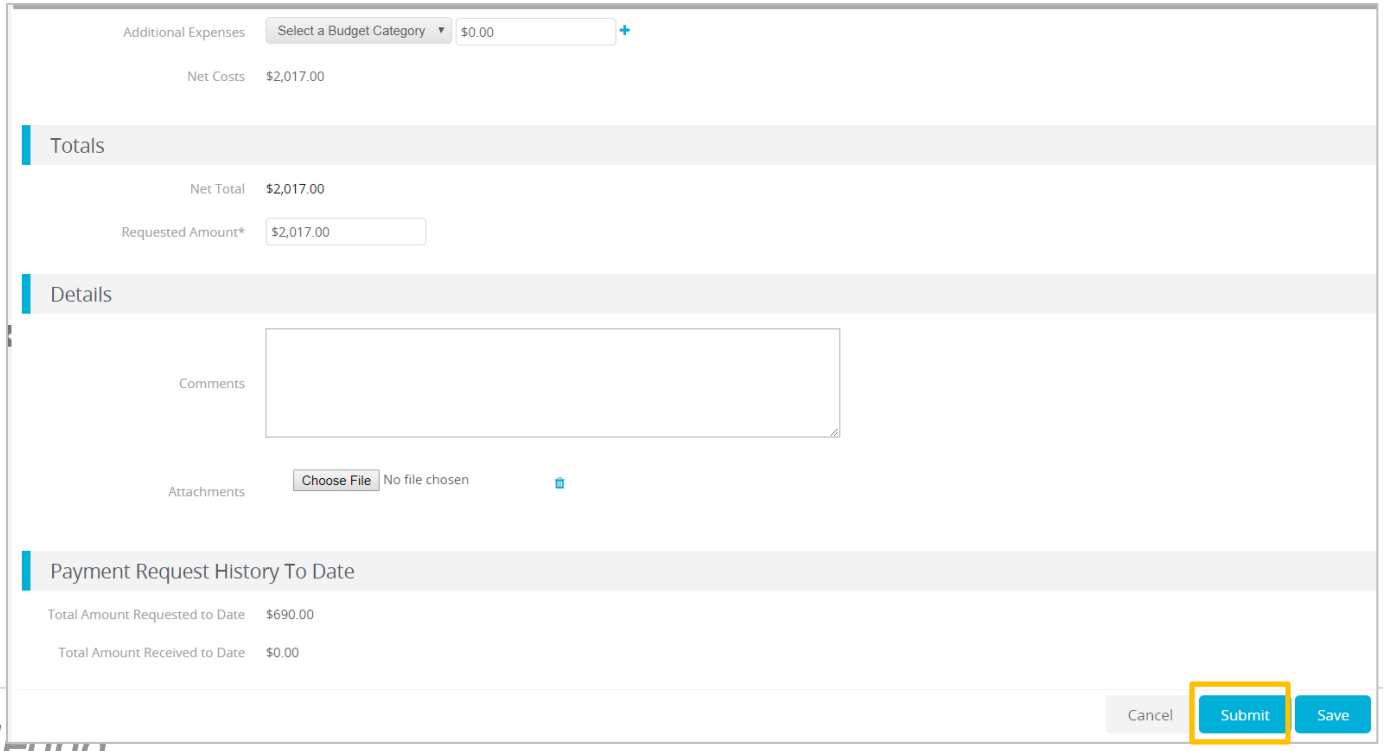
Tracking Period Start Date	Tracking Period End Date	Tracking Period Type	Status
07/01/2016	09/30/2016	Budget	Open
10/01/2016	12/31/2016	Budget	Open
01/01/2017	03/31/2017	Budget	Open
04/01/2017	06/30/2017	Budget	Open
07/01/2017	09/30/201		Open
10/01/2017	12/31/201		Closed



AmpliFund Grant Management

Submitting Payment Requests

1. Go to ***Grant Management > Grants > select Grant > Post-Award > Payment Request***
2. Update *Name* and Date *Created* as needed
3. Review the Costs
   Note: pre-populated costs pull from the connected closed Reporting Periods
4. Enter the **Requested Amount**
5. Add Comments and Attachments as needed
6. Click the **Submit** button

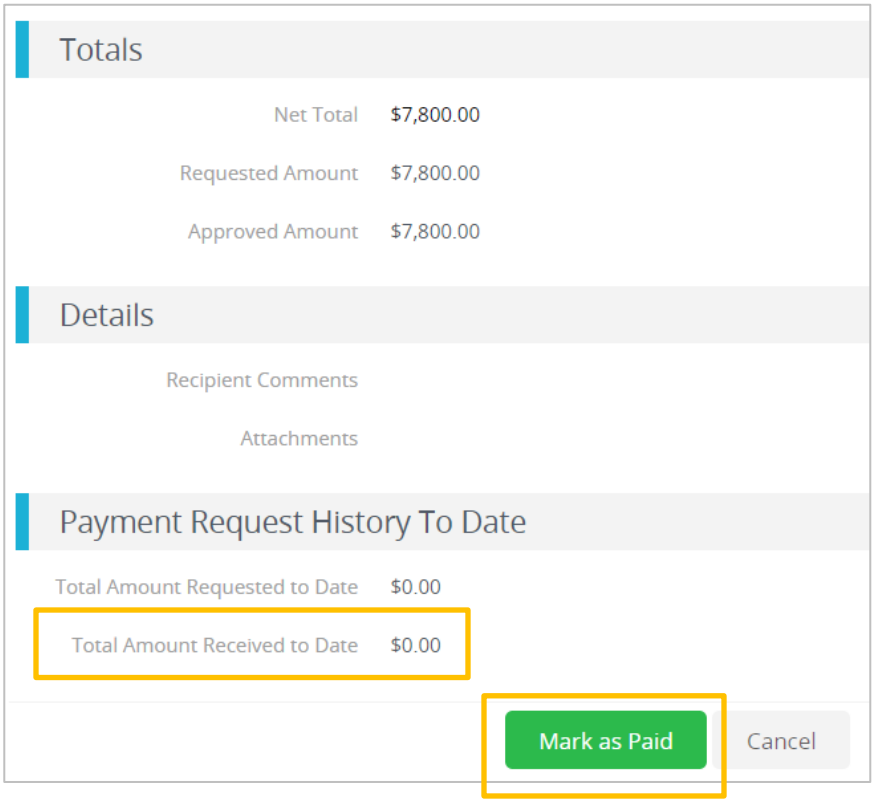


Marking Payment Request as Paid

Once approved, Payment Requests can be marked as Paid

1. Go to Grant Management > Grants > select Grant
2. Open Post-Award tab > Payment Requests > select Approved Payment Request
3. Click the Mark as Paid button

Marking a Payment Request Paid updates the *Total Amount Received* field



Email Notifications

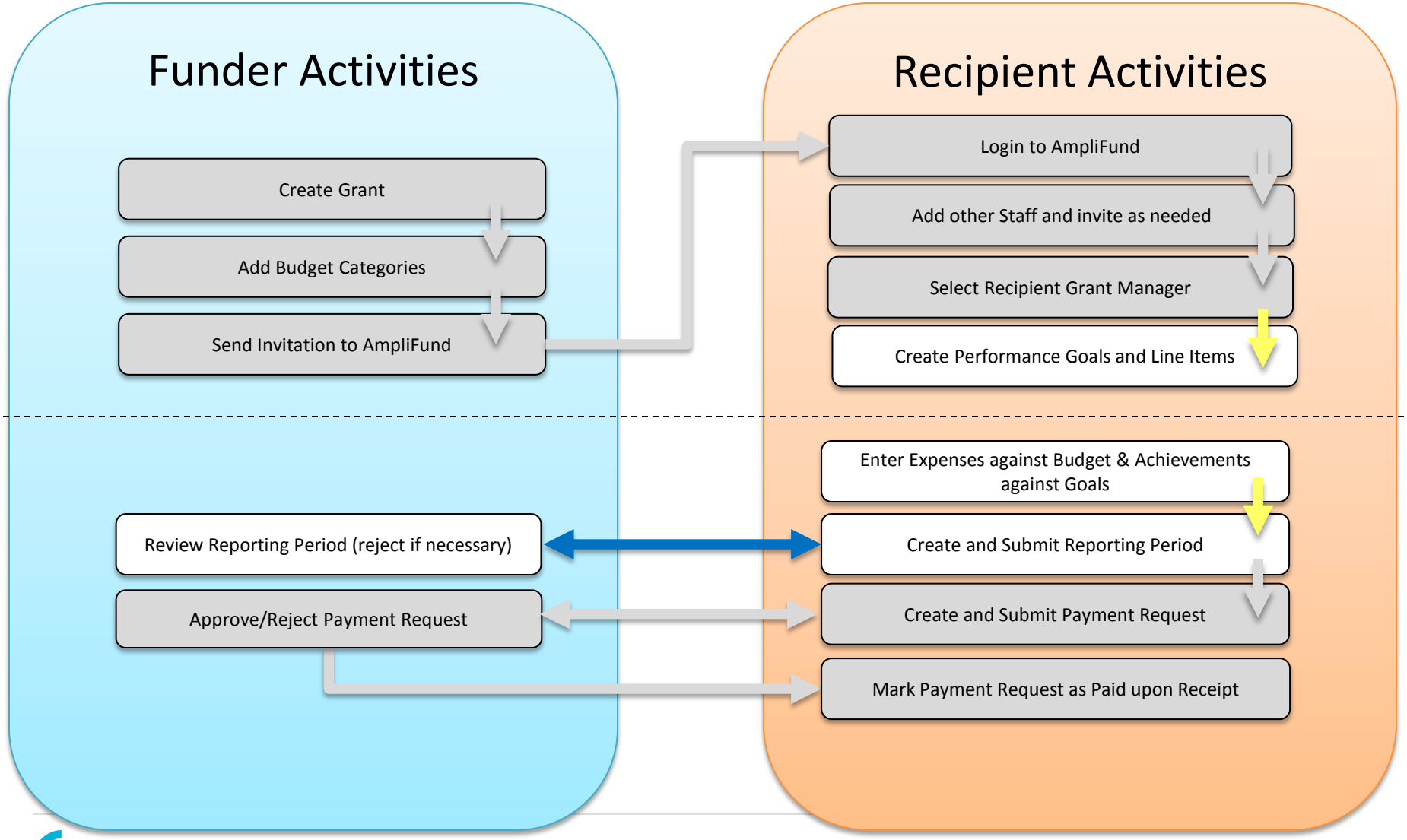
All system generated emails are sent from no-reply@gotomygrants.com

- Automated emails sent:
  - To funder upon payment request submission
  - To grantee if payment request is rejected
  - To grantee if payment request is approved

Creating & Managing a Performance Plan

- Accessing the Performance Plan
- Adding Performance Goals
- Tracking Achievements on Performance Goals
- Security for Tracking Achievements on Performance Goals
- Creating & Closing Performance Reporting Periods

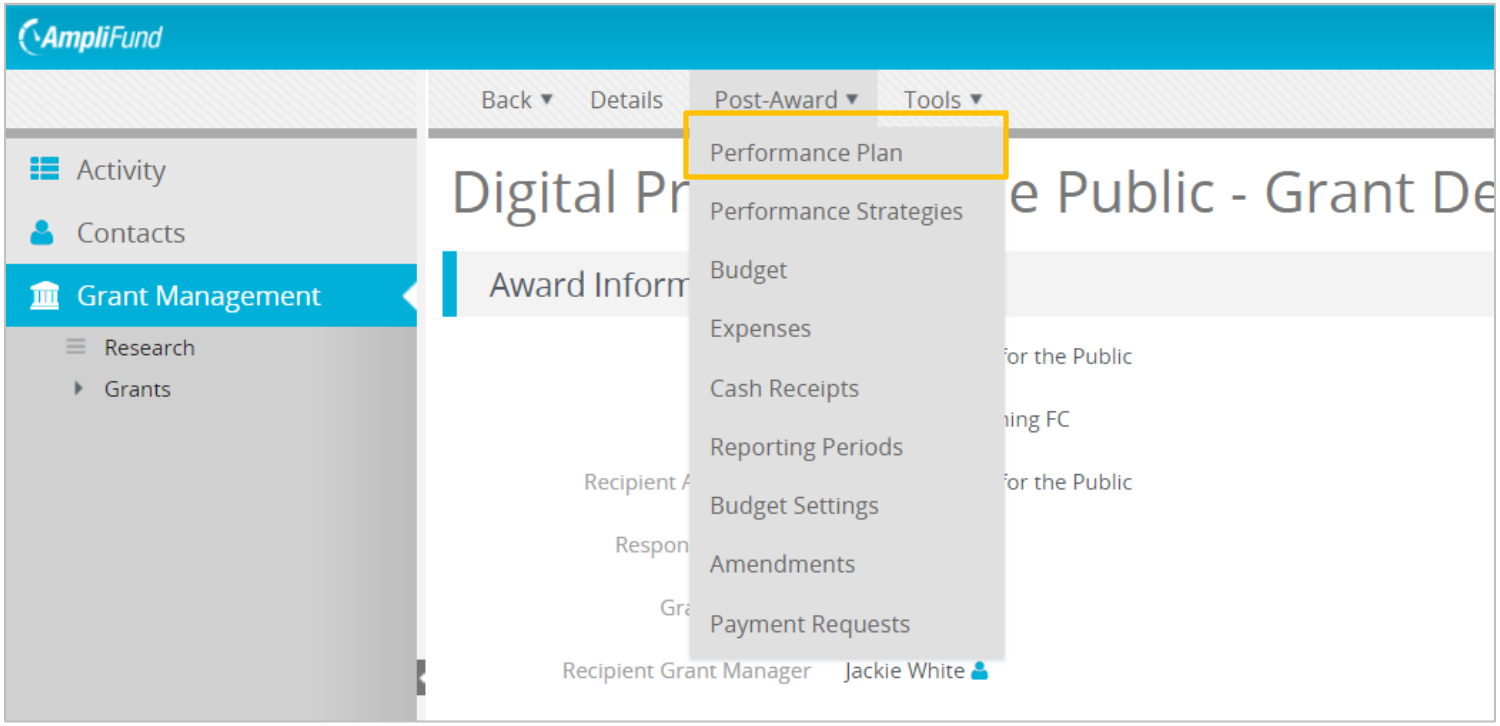
Performance Plan Process Overview



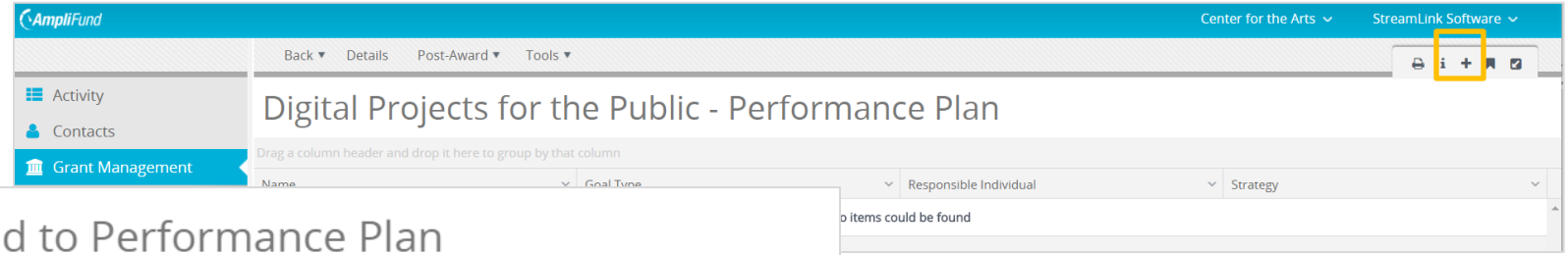
AmpliFund Grant Management

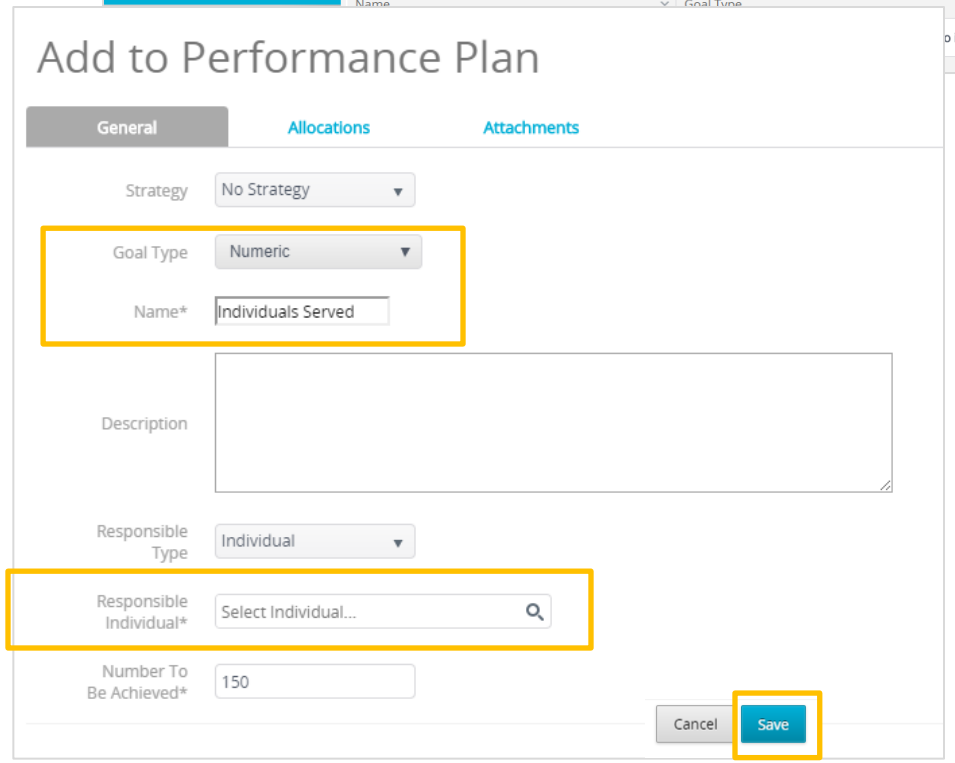
Accessing the Performance Plan

1. Go to ***Grant Management > All Grants***
2. Click the **Name** of the grant
3. From the **Post-Award tab**, select **Performance Plan**



Adding Performance Goals





1. Go to ***Grant Management > Grants > Click Grant Name > Post-Award menu > Performance Plan***
2. Click the **Create Goal (+)** icon in the icon bar
3. Select a **Goal Type**
4. Add **Goal Name***
5. Include **Goal Description** (optional)
6. Select **Responsible Individual*** from staff list
7. Add **Planned Goal Detail**
8. Click **Save** button
9. Repeat as needed

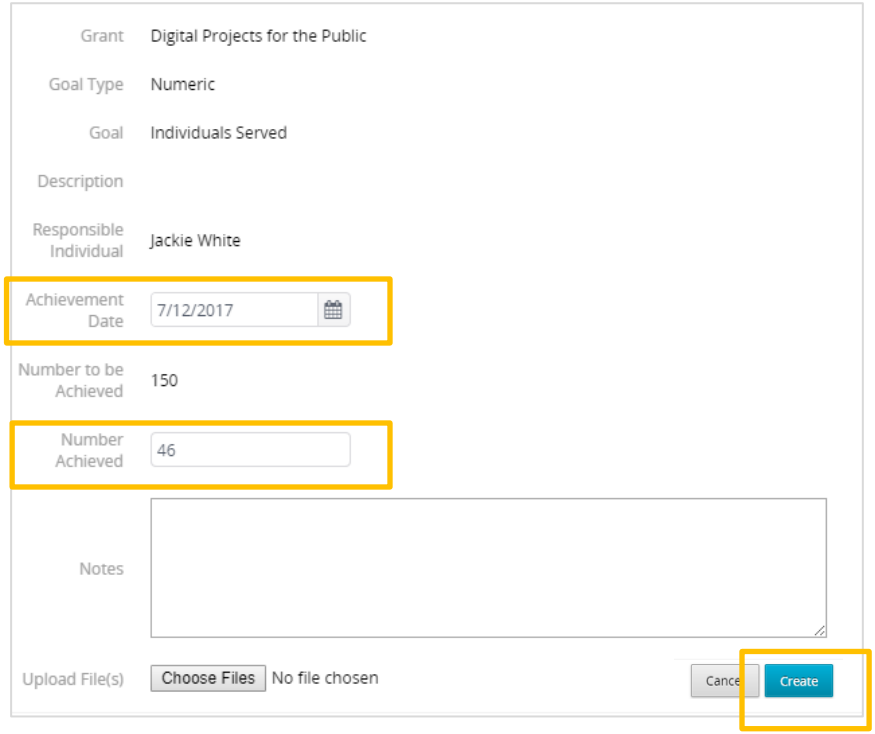
Tracking Achievements on Performance Goals

Option 1:

1. Go to ***Activity > Achievements***
2. Click the **Add Achievements (+)** icon
3. Add the achievement details in the pop-up window
4. Click **Create**

Option 2:

1. Go to ***Grant Management > Grants > All Grants***
2. Click on the award Name
3. From **Post-Award tab**, click **Performance Plan**
4. Click the **View Achievements** icon next to a performance goal
5. Click the **Create (+)** icon in the *Icon Bar*
6. Add the achievement details in the pop-up window
7. Click **Create**



Note: *The fields in the achievement details window will vary based on the goal type.*

Security for Tracking Achievements on Performance Goals

Option 1:

1. Go to ***Activity > Achievements***
2. Click the **Add Achievements (+)** icon
3. Add the achievement details in the pop-up window
4. Click **Create**

Who can access Option 1:

- Organization Administrator
- Grant Manager
- Department User (No Salary) who is also the Responsible Individual on the performance goal

Option 2:

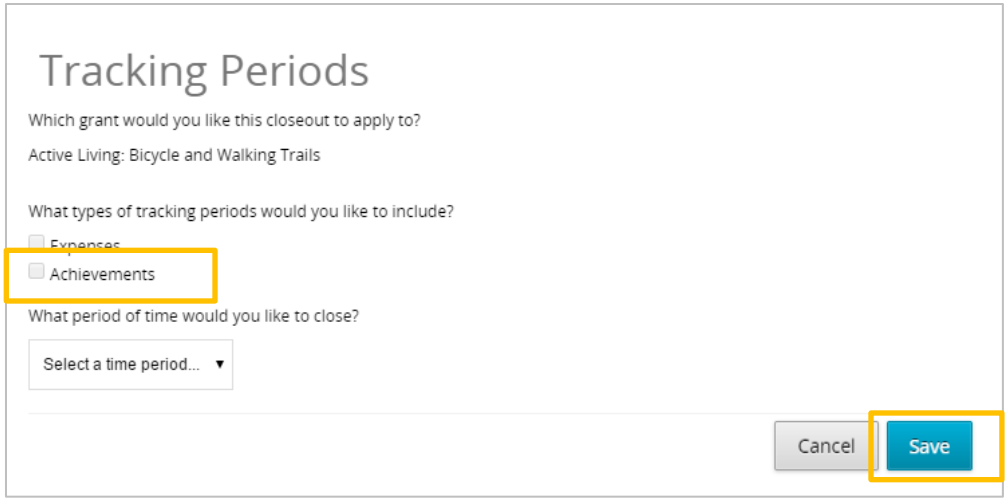
1. Go to ***Grant Management > Grants > All Grants***
2. Click on the award Name
3. From **Post-Award tab**, click **Performance Plan**
4. Click the **View Achievements**  icon next to a performance goal
5. Click the **Create (+)** icon in the *Icon Bar*
6. Add the achievement details in the pop-up window
7. Click **Create**

Who can access Option 2:

- Organization Administrator
- Grant Manager

Creating & Closing Performance Reporting Periods

1. Go to ***Grant Management > Grants > select Grant > Post-Award > Reporting Periods***
2. Click the **Create** icon in the Options bar
3. Select the **Achievements** checkbox under Types of Reporting Periods to include
4. Choose the Period of Time
5. Click the **Save** button
6. Review Reporting Period Details, including any goals lacking achievements
7. Select Achievements to Close Out
8. Click the **Close** button
9. At the confirmation pop-up, click **Close**



Support Procedures & Details

- Support Procedures
- Creating an AmpliFund Support Site Account
- Accessing AmpliFund Documentation
- AmpliFund Reference Materials and URLs
- Contacting AmpliFund Support

Support Procedures

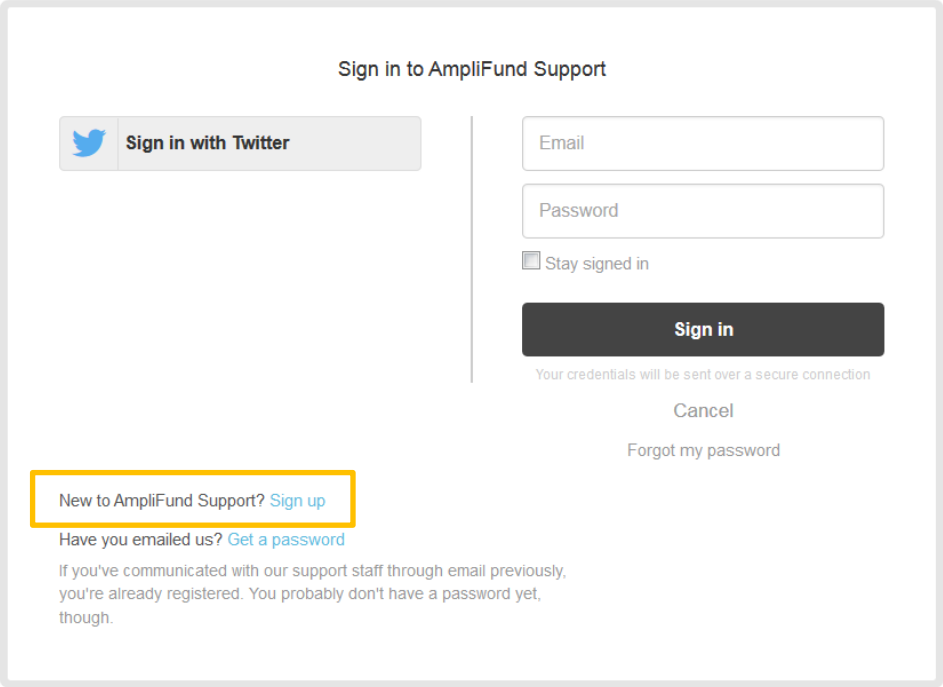
- **John Snyder** is the primary point of contact for questions related to utilizing AmpliFund to create and manage the budget and performance plans for your grants

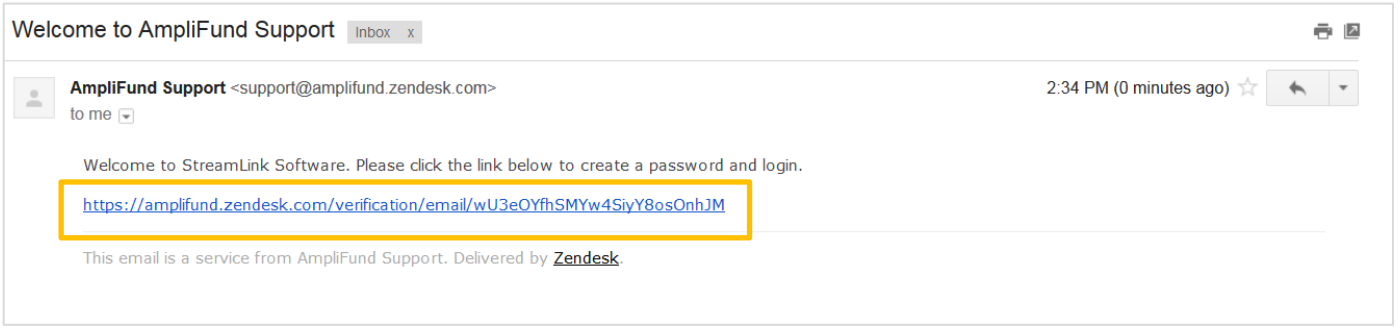
- **John Snyder** will contact StreamLink's Customer Success Team via the AmpliFund Support Portal (https://amplifund.zendesk.com) if they determine that a question requires technical assistance from StreamLink

- StreamLink Software's support hours are 8:00 AM – 8:00 PM ET (Monday – Friday)

Creating an AmpliFund Support Site Account

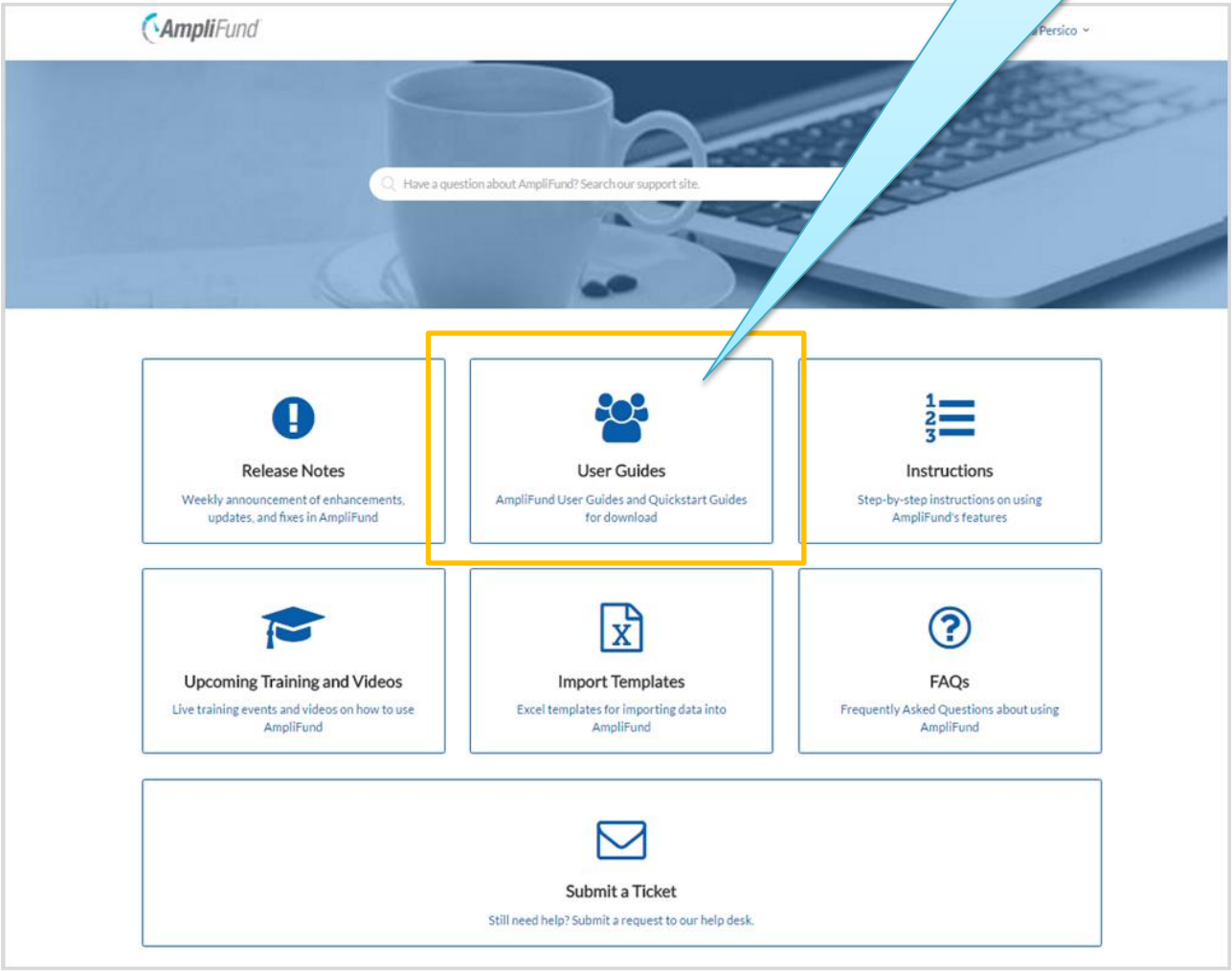
1. Go to https://amplifund.zendesk.com
2. Click the **Sign up** link
3. Enter your **full name**
4. Enter your **email address**
5. Complete the **I'm not a robot** check
6. Click the **Sign Up** button
7. A welcome email from support@amplifund.zendesk.com will be sent to you via email
8. Click the link to set your password





Accessing AmpliFund Documentation

User Guides available on the AmpliFund Support Site



AmpliFund Reference Materials and URLs

Reference Materials:

- *Recipient User Guide*
- *Amendment Guide for Grant Recipients*

> ***Note:*** Guides are accessible from the **User Guides** section of the AmpliFund Support Site. Updated documentation is posted on the AmpliFund Support Site as changes are made to system features and functionality.

Important URLs:

- AmpliFund: www.gotomygrants.com
- AmpliFund Support Site: https://amplifund.zendesk.com

Contacting AmpliFund Support

Customer Success

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 IE9 +
- Apple Safari for Mac OS X (6+)