



# Recipient Training

November 29, 2017



# Session Goal & Agenda

**Goal:** Familiarize attendees with Recipient functionality

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- **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

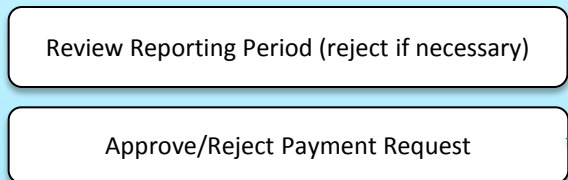
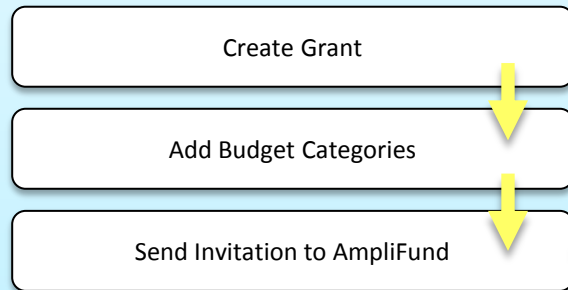
# AmpliFund Overview

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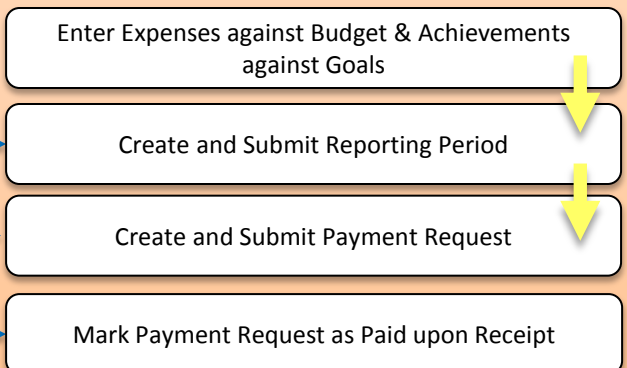
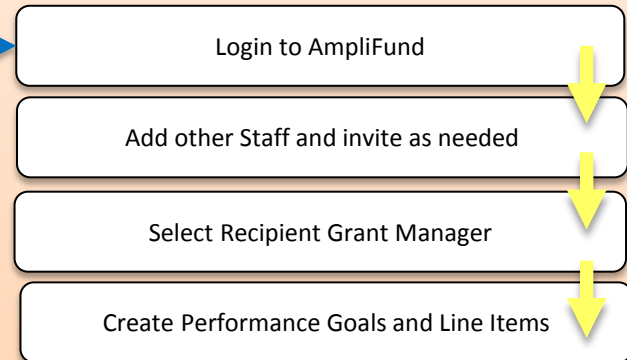
- SaaS based grants management solution
- No installation for users
- AmpliFund is accessible anywhere you have an internet connection
- AmpliFund provides a recipient organization with the ability to share information and report back to the granting organization

# Process Overview

## Funder Activities

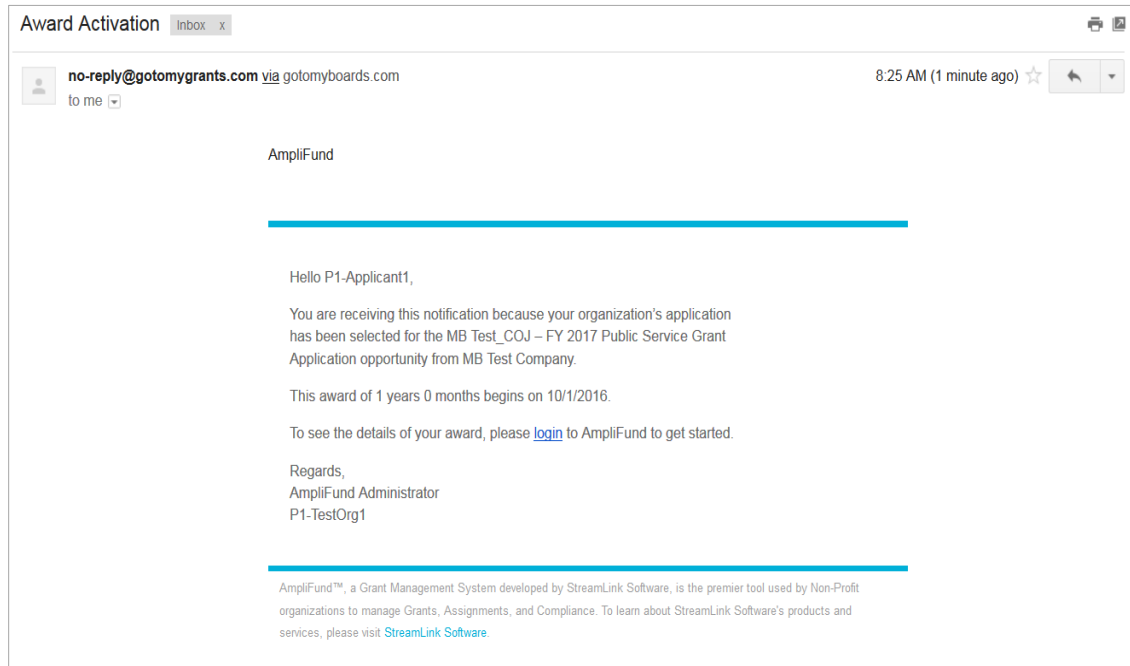


## Recipient Activities



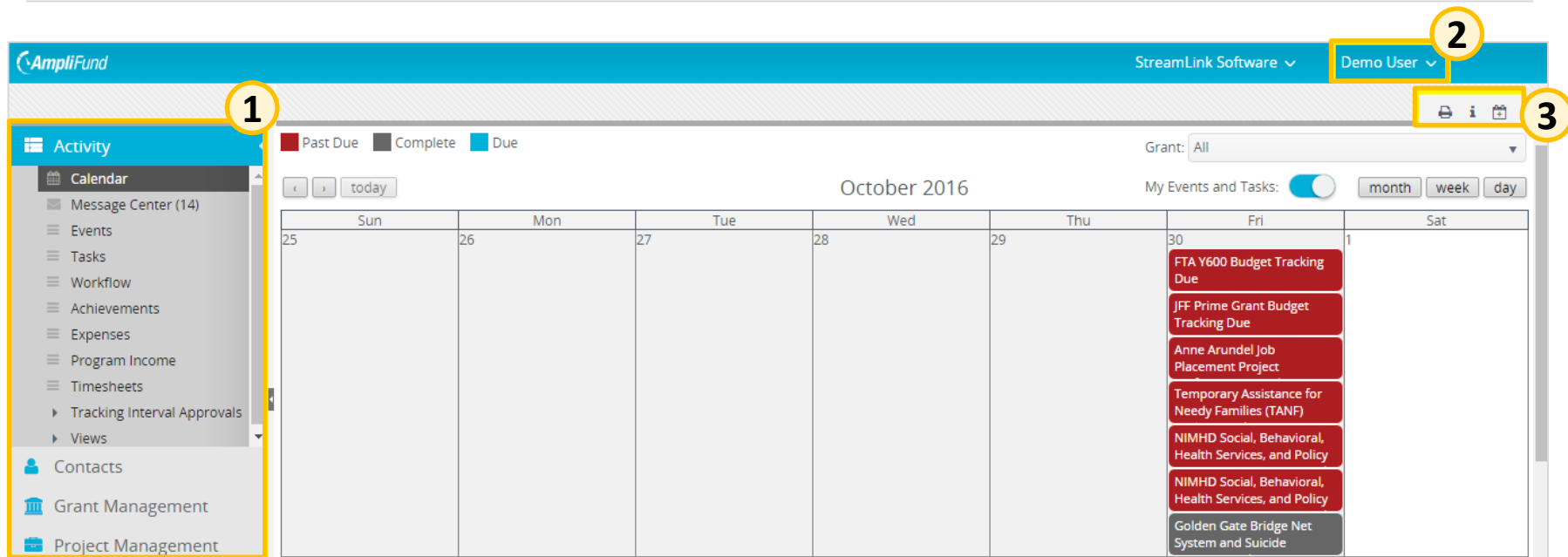
# Award Activation Email Notification

## Award Activation Email



- 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

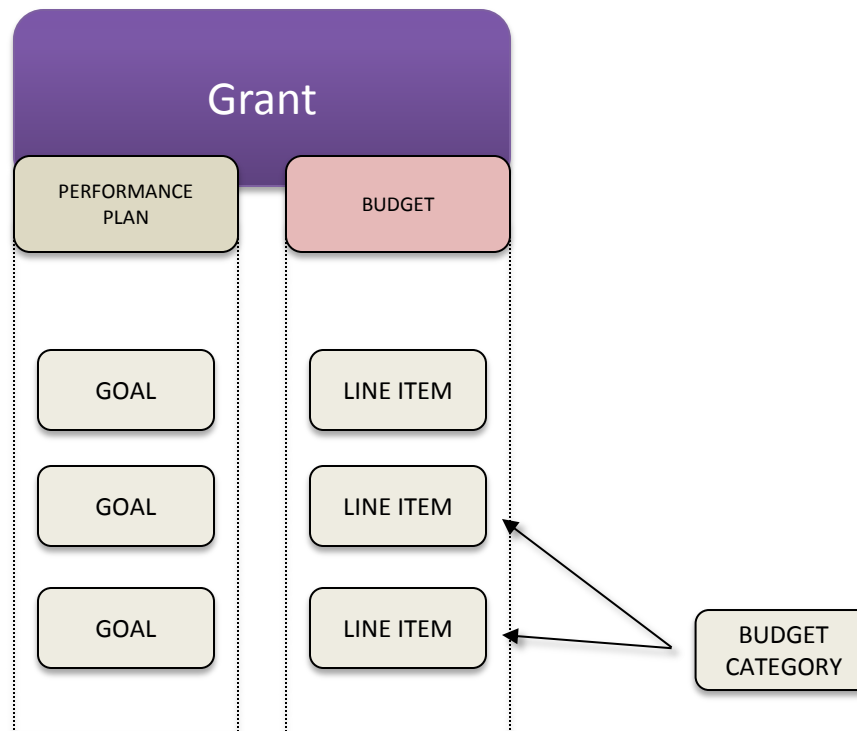
# Navigation Elements & Calendar



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

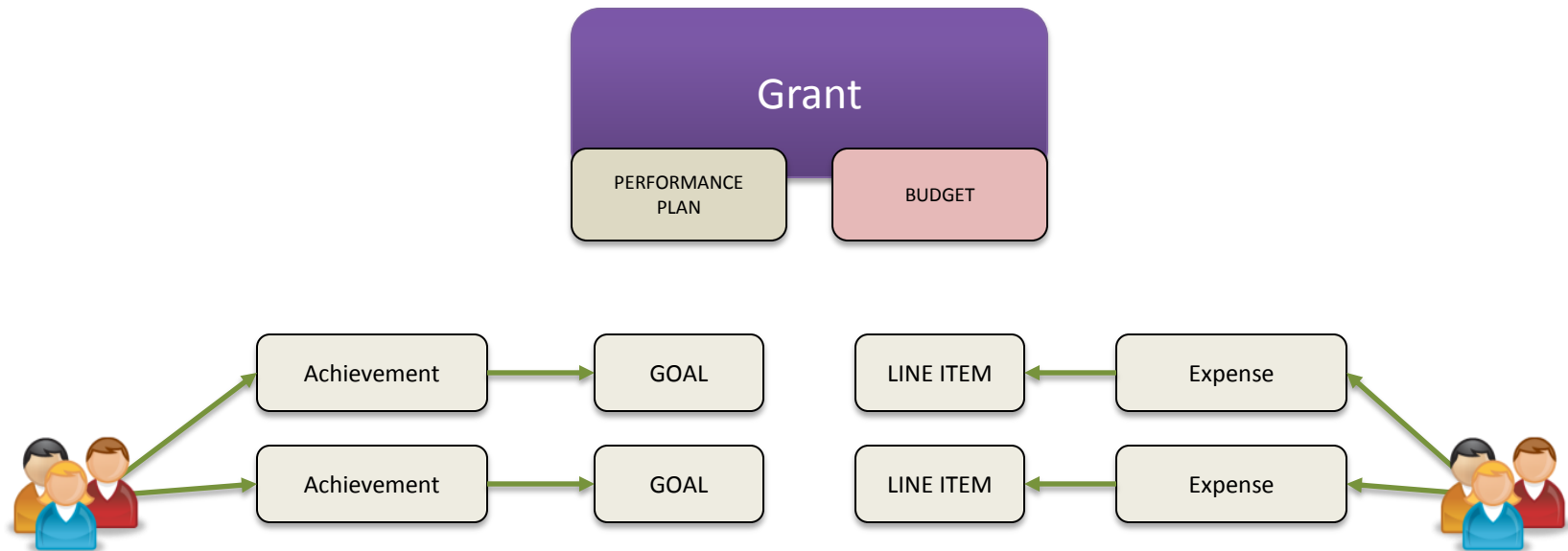
# Grant Management

## 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

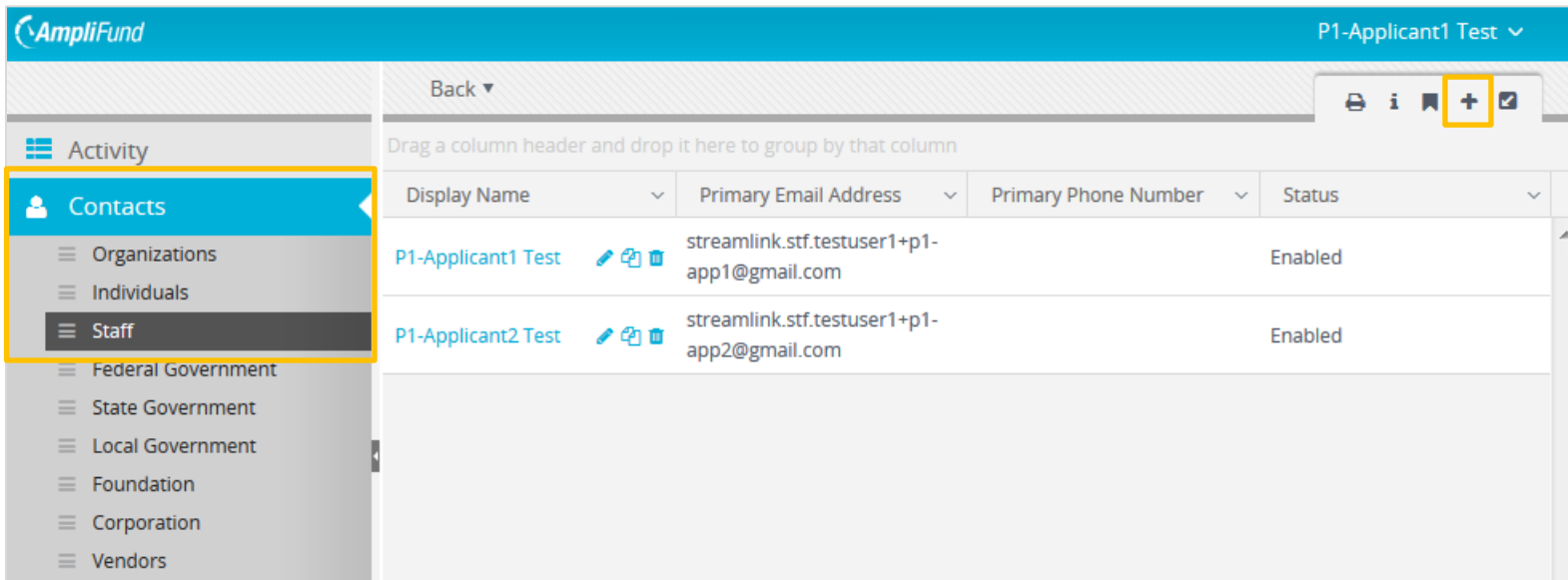
# Creating Staff

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

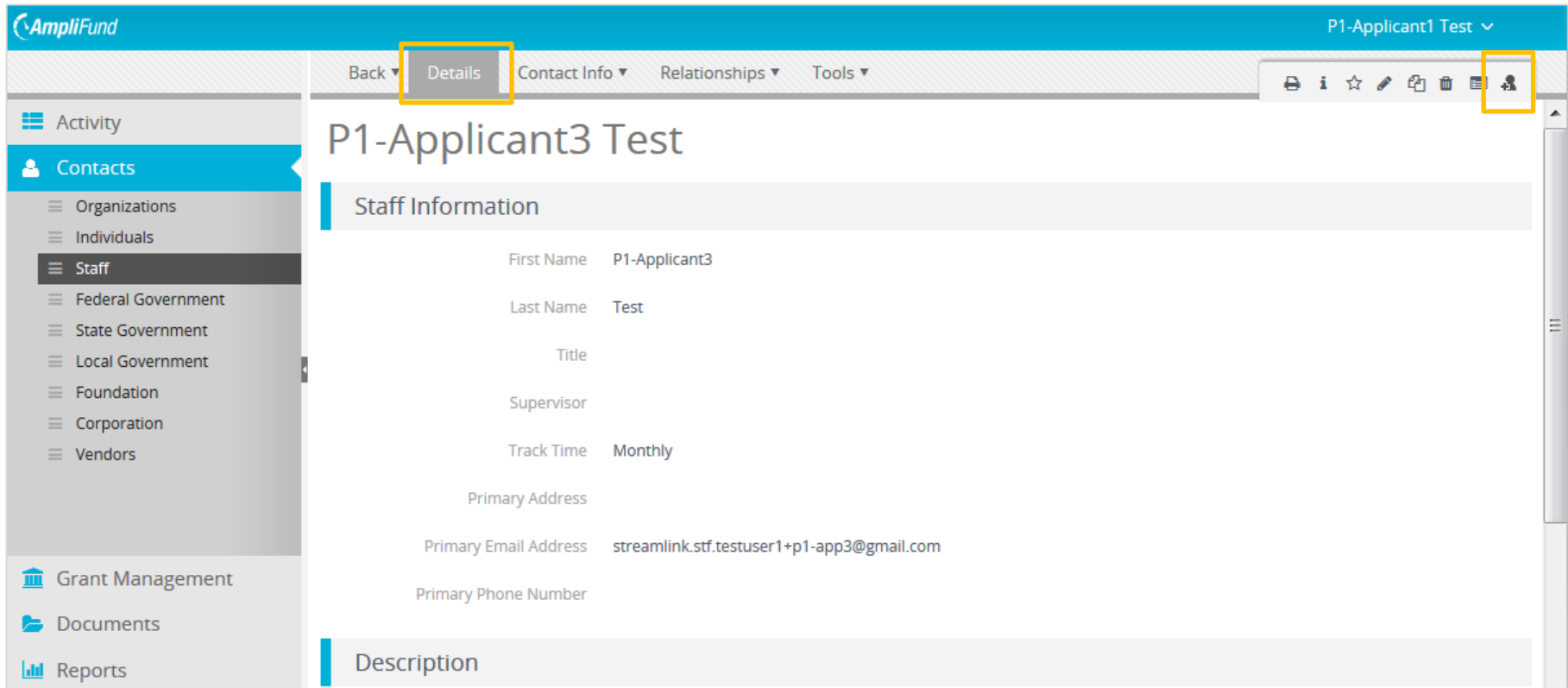


The screenshot displays the AmpliFund interface. On the left, a sidebar menu shows 'Contacts' selected, with 'Staff' highlighted. The main area shows a table of staff members. The table has columns for Display Name, Primary Email Address, Primary Phone Number, and Status. Two staff members are listed: 'P1-Applicant1 Test' and 'P1-Applicant2 Test', both with 'Enabled' status. A yellow box highlights the 'Create' icon (plus sign) in the top right corner of the table.

| Display Name       | Primary Email Address                      | Primary Phone Number | Status  |
|--------------------|--------------------------------------------|----------------------|---------|
| P1-Applicant1 Test | streamlink.stf.testuser1+p1-app1@gmail.com |                      | Enabled |
| P1-Applicant2 Test | streamlink.stf.testuser1+p1-app2@gmail.com |                      | Enabled |

# 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 of the screen



The screenshot shows the AmpliFund Grant Management interface. The top navigation bar includes 'Back', 'Details' (highlighted), 'Contact Info', 'Relationships', and 'Tools'. The right side of the top bar shows 'P1-Applicant1 Test' and a 'Create User' icon (highlighted). The left sidebar contains 'Activity', 'Contacts' (selected), 'Organizations', 'Individuals', 'Staff' (selected), 'Federal Government', 'State Government', 'Local Government', 'Foundation', 'Corporation', 'Vendors', 'Grant Management', 'Documents', and 'Reports'. The main content area displays 'P1-Applicant3 Test' with a 'Staff Information' section containing the following details:

| Field                 | Value                                      |
|-----------------------|--------------------------------------------|
| First Name            | P1-Applicant3                              |
| Last Name             | Test                                       |
| Title                 |                                            |
| Supervisor            |                                            |
| Track Time            | Monthly                                    |
| Primary Address       |                                            |
| Primary Email Address | streamlink.stf.testuser1+p1-app3@gmail.com |
| Primary Phone Number  |                                            |

The 'Description' section is visible at the bottom of the main content area.

# 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 of the screen

The screenshot displays the AmpliFund software interface for editing a user. The left sidebar contains navigation menus for 'Activity', 'Contacts', and 'Grant Management'. The 'Contacts' menu is expanded, showing 'Organizations', 'Individuals', and 'Staff'. The 'Staff' menu item is selected. The main content area is titled 'User Information' and shows the 'Username' as 'streamlink.stf.testuser1+p1-app3@gmail.com'. A yellow box highlights the 'Subscribe to Daily Emails' (Yes), 'Subscribe to Weekly Emails' (Yes), and 'Applicant Portal Access' (No) settings. Below these, the 'Role\*' dropdown menu is open, showing options: 'Organizational Admin', 'Executive', 'Department Admin', 'Department User (Salary)', and 'Department User (No Salary)'. The 'Status' dropdown menu is also highlighted with a yellow box, showing 'Enabled'. At the bottom right, the 'Create' button is highlighted with a yellow box, next to a 'Cancel' button.

AmpliFund P1-Applicant1 Test

Back

User Information

Username streamlink.stf.testuser1+p1-app3@gmail.com

Subscribe to Daily Emails Yes

Subscribe to Weekly Emails Yes

Applicant Portal Access No

Role\* Organizational Admin

Staff

Organizational Admin

Executive

Department Admin

Department User (Salary)

Department User (No Salary)

Record Information

User Identifier

Status Enabled

Create Cancel

# Converting Staff to a User *(continued)*


## User Information:

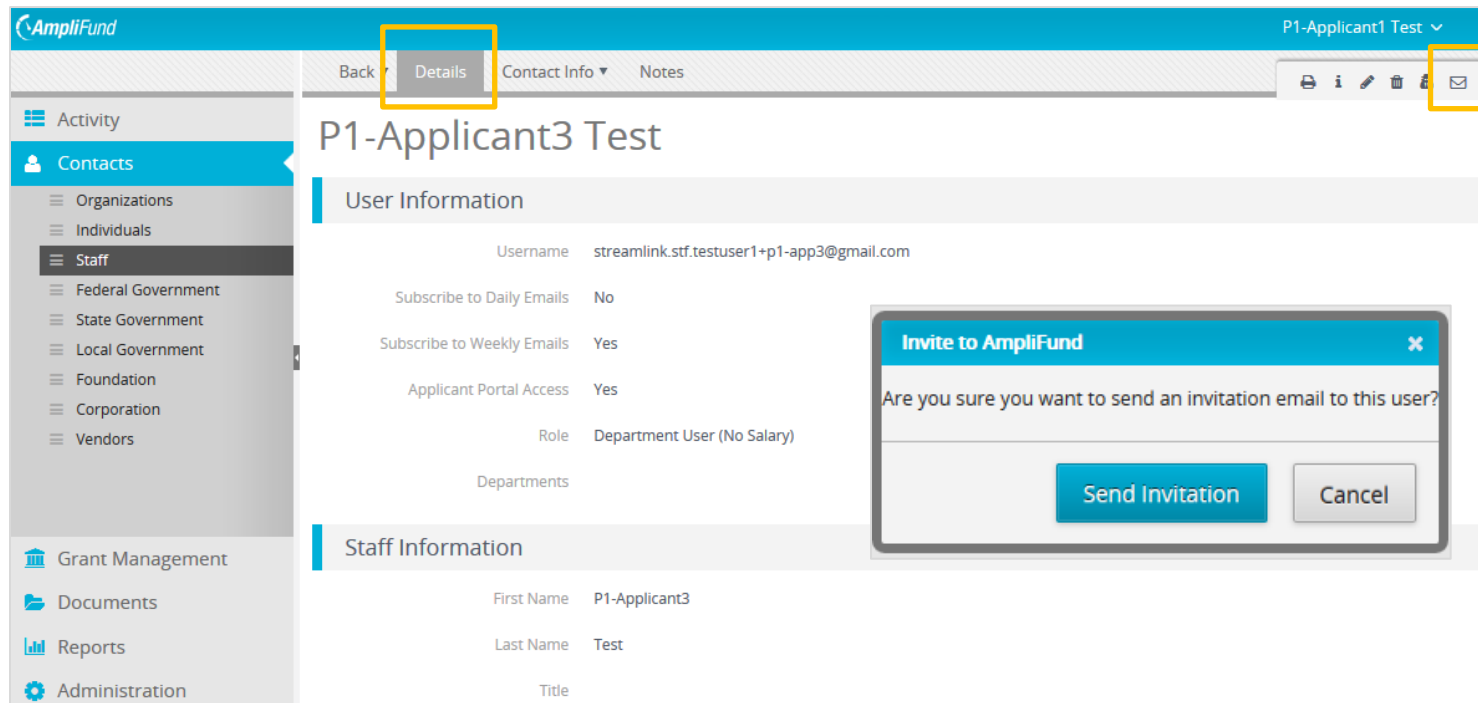
- **Subscribe to Daily Emails**
- **Subscribe to Weekly Emails**
- **Applicant Portal Access**
  - Set to **Yes** to provide a user in your organization with access to the application(s) submitted by your organization
- **Role\***
  - **Organization Admin**
    - Full view and edit access to your organization's 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

The screenshot shows the 'User Information' form. It includes fields for Username (streamlink.stf.testuser1+p1-app3@gmail.com), Subscribe to Daily Emails (Yes), Subscribe to Weekly Emails (Yes), Applicant Portal Access (No), Role\* (Organizational Admin), Staff (Organizational Admin), Record Information (User Identifier), and Status (Enabled). A dropdown menu is open for the Role\* field, showing options: Organizational Admin, Executive, Department Admin, Department User (Salary), and Department User (No Salary).

**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

AmpliFund Login Information Inbox x

 **AmpliFund Administrator** no-reply@gotomygrants.co 12:19 PM (11 minutes ago) ☆  


to me ▾

AmpliFund

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Dear P1-Applicant3,

You have been invited to use AmpliFund as part of our organization. This is the product we use to help manage our grant-related activities.

If you've never used AmpliFund, please use this [link](#) to set your password and login. 

If you are an existing user of AmpliFund, login using your current email address and password. To switch between organizations, use the dropdown in the top right of the screen.

Regards,  
AmpliFund Administrator  
P1-TestOrg1

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AmpliFund™, a Grant Management System developed by StreamLink Software, is the premier tool for organizations to manage Grants, Assignments, and Compliance. To learn about StreamLink Software services, please visit [StreamLink Software](#).

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

AmpliFund

## Reset Password

New Password\*

Confirm New Password\*

# 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.

The screenshot shows the AmpliFund user interface. On the left is a sidebar with a menu including 'Activity', 'Calendar', 'Message Center', 'Events', 'Tasks', 'Achievements', 'Expenses', 'Program Income', and 'Tracking Interval Approvals'. The main content area is titled 'P1-Applicant3 Test' and contains two sections: 'User Information' and 'Staff Information'. The 'User Information' section displays fields for Username, Subscribe to Daily Emails, and Subscribe to Weekly Emails. The 'Staff Information' section displays fields for First Name, Last Name, Title, Supervisor, Time Tracking, Primary Address, Primary Email Address, and Primary Phone Number. In the top right corner, a user navigation menu is open, showing options: 'P1-Applicant3 Test', 'Account Information', 'Change Password', 'Message Center', 'Support', 'Terms and Conditions', and 'Logout'. The menu is highlighted with a yellow border.

| User Information           |                                            |
|----------------------------|--------------------------------------------|
| Username                   | streamlink.stf.testuser1+p1-app3@gmail.com |
| Subscribe to Daily Emails  | No                                         |
| Subscribe to Weekly Emails | Yes                                        |


| Staff Information     |                                            |
|-----------------------|--------------------------------------------|
| First Name            | P1-Applicant3                              |
| Last Name             | Test                                       |
| Title                 |                                            |
| Supervisor            |                                            |
| Time Tracking         | Monthly                                    |
| Primary Address       |                                            |
| Primary Email Address | streamlink.stf.testuser1+p1-app3@gmail.com |
| Primary Phone Number  |                                            |



## Updating Grant Details

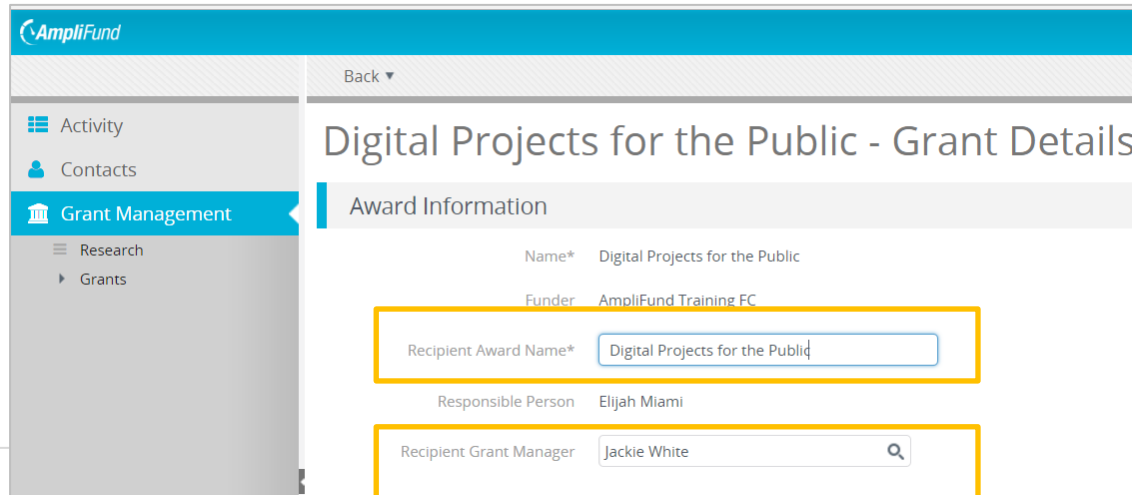
- Adding the Recipient Grant Manager

# 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



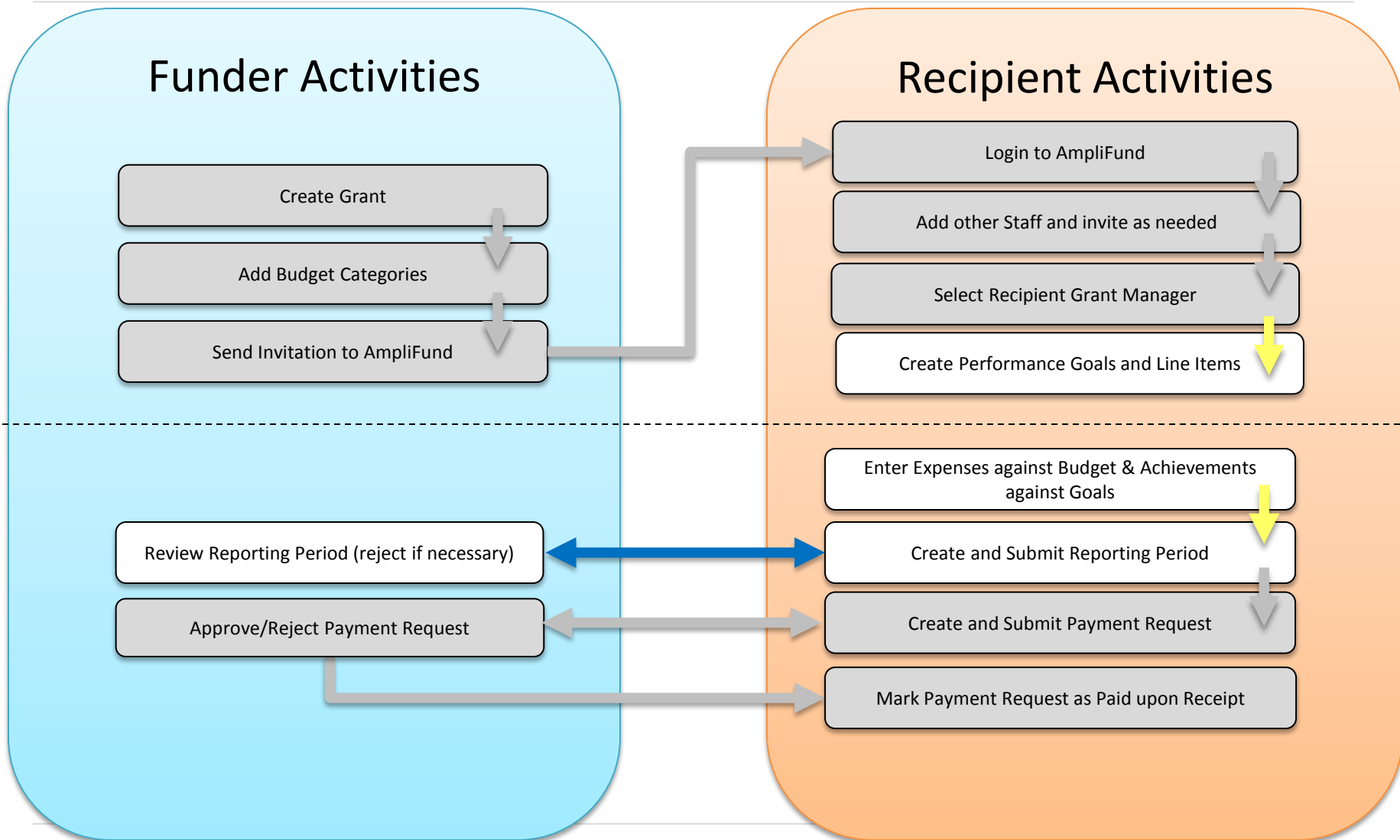
The screenshot displays the AmpliFund web application interface. On the left is a navigation sidebar with a blue header containing the AmpliFund logo. The sidebar menu includes 'Activity', 'Contacts', 'Grant Management' (which is highlighted in blue), 'Research', and 'Grants'. The main content area has a blue header with the AmpliFund logo and a 'Back' button. Below the header, the title 'Digital Projects for the Public - Grant Details' is displayed. The form contains the following fields: 'Name\*' with the value 'Digital Projects for the Public', 'Funder' with the value 'AmpliFund Training FC', 'Recipient Award Name\*' with the value 'Digital Projects for the Public' (this field is highlighted with a yellow box), 'Responsible Person' with the value 'Elijah Miami', and 'Recipient Grant Manager' with the value 'Jackie White' (this field is also highlighted with a yellow box). A search icon is visible next to the Recipient Grant Manager field.



## Accessing & Managing a Budget

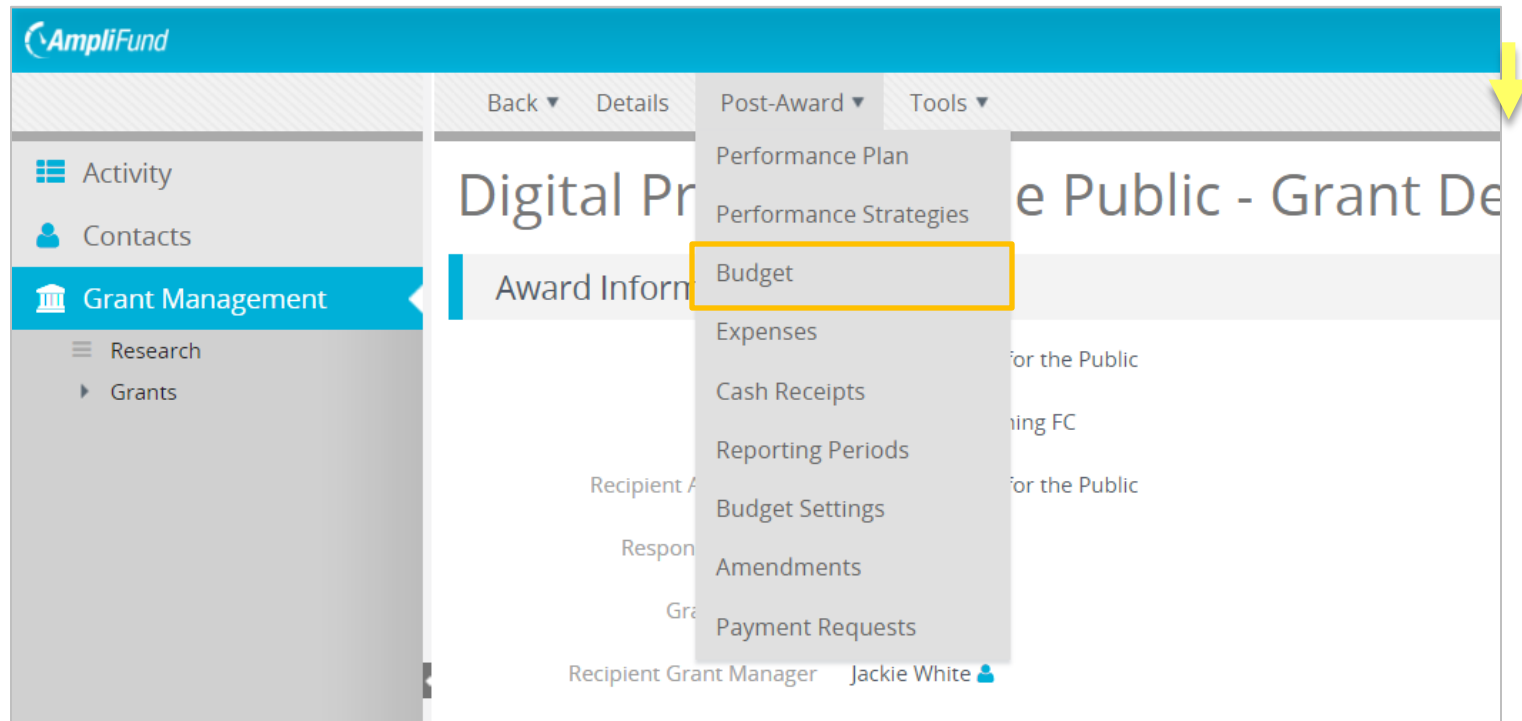
- Accessing the Budget
- Adding Line Items
- Tracking Expenses on Budget Line Items
- Security for Tracking Expenses on Budget Line Items
- Creating & Closing Budget Reporting Periods

# Budget and Reporting Process Overview



# 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

Digital Projects for the Public – Budget

Start: 6/1/2017

End: 5/31/2019

Budget View Settings

Options



Grant Year

Responsible Individuals

Budget



Expense Budget +

Grant Funded

Materials +  



Subtotal

\$0.00

Other +  



Subtotal

\$0.00

Personnel +  



Subtotal

\$0.00

Technology +  

Subtotal

\$0.00

Travel +  

Subtotal

\$0.00

Total Expense Budget Cost

\$0.00

\$0.00

Revenue Budget

Grant Funded

Total Revenue

Grant Funding

Awarded Amount

\$300,000.00

\$300,000.00

Subtotal

\$300,000.00

\$300,000.00

Category

Name\*

iPads

Direct Cost\*

☒

Exclude P

☒

Exclude P

Responsible Type

Individual

Responsible Individual\*

Jackie White

General
Financials
Configuration
Attachments

Item Type
Non Personnel

Category

Name\*
iPads

Direct Cost\*
\$1,490.00

☒ Exclude From Match

☒ Exclude From Indirect

Responsible Type
Individual

Responsible Individual\*
Jackie White

# 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**

**Add Expense**

General Financials Attachments

Grant: Digital Projects for the Public

Category: Select a Category

Line Item: Marketing Materials

Item Type: Non-Personnel Line Item

Direct Cost: \$450.00

Exclude from match

Responsible Individual: Jackie White

Created By: center@streamlinksoftware.com

Expense Date: 7/11/2017

Expense Status: Reviewed

Payee: Other Select Payee... Create New ?

Description

Cancel Save

# Security for Tracking Expenses on Budget Line Items

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## 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:

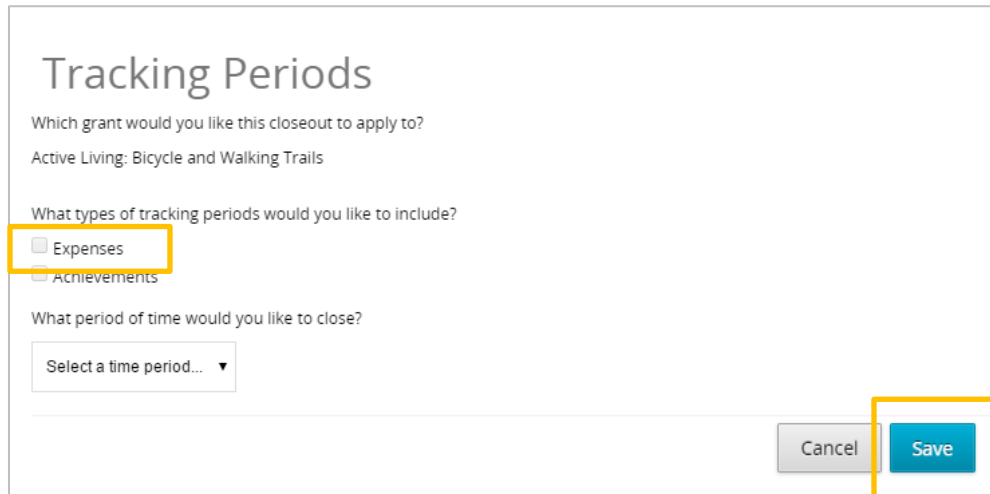
1. Go to **Grant Management > Grants > All Grants**
2. Click on the award Name
3. From **Post-Award tab**, click **Budget**
4. Click the **View Expenses (\$)** icon next to a line item
5. Click the **Create Expense (+)** icon in the *Icon Bar*
6. Add **Expense Date** and **Total Direct Cost**
7. Mark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



**Tracking Periods**

Which grant would you like this closeout to apply to?

Active Living: Bicycle and Walking Trails

What types of tracking periods would you like to include?

☒ Expenses

☐ Achievements

What period of time would you like to close?

Select a time period... ▼

Cancel Save

# 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**

### Overall Expense Details

Total Awarded Amount \$400,000.01

Total Expense Amount for Period ? \$6,130.35

Number of Unreviewed Expenses 0

Comments

Attach Documentation

Attach Documentation Choose File No file chosen

### Expenses Analytics

# of Categories within 10% of Budget 0

# of Categories over Budget 0

# of Categories under Budget 3

Variance for Period (\$27,619.65)

Variance Grant to Date (\$218,279.65)

### Expenses Closeout

Select All ☒

| Select                              | Category Name | Budgeted Amount | Total Amount |
|-------------------------------------|---------------|-----------------|--------------|
| <input checked="" type="checkbox"/> | Personnel     | \$31,250.00     | \$5,284.12   |
| <input checked="" type="checkbox"/> | Supplies      | \$1,500.00      | \$592.00     |
| <input checked="" type="checkbox"/> | Technology    | \$1,000.00      | \$254.23     |

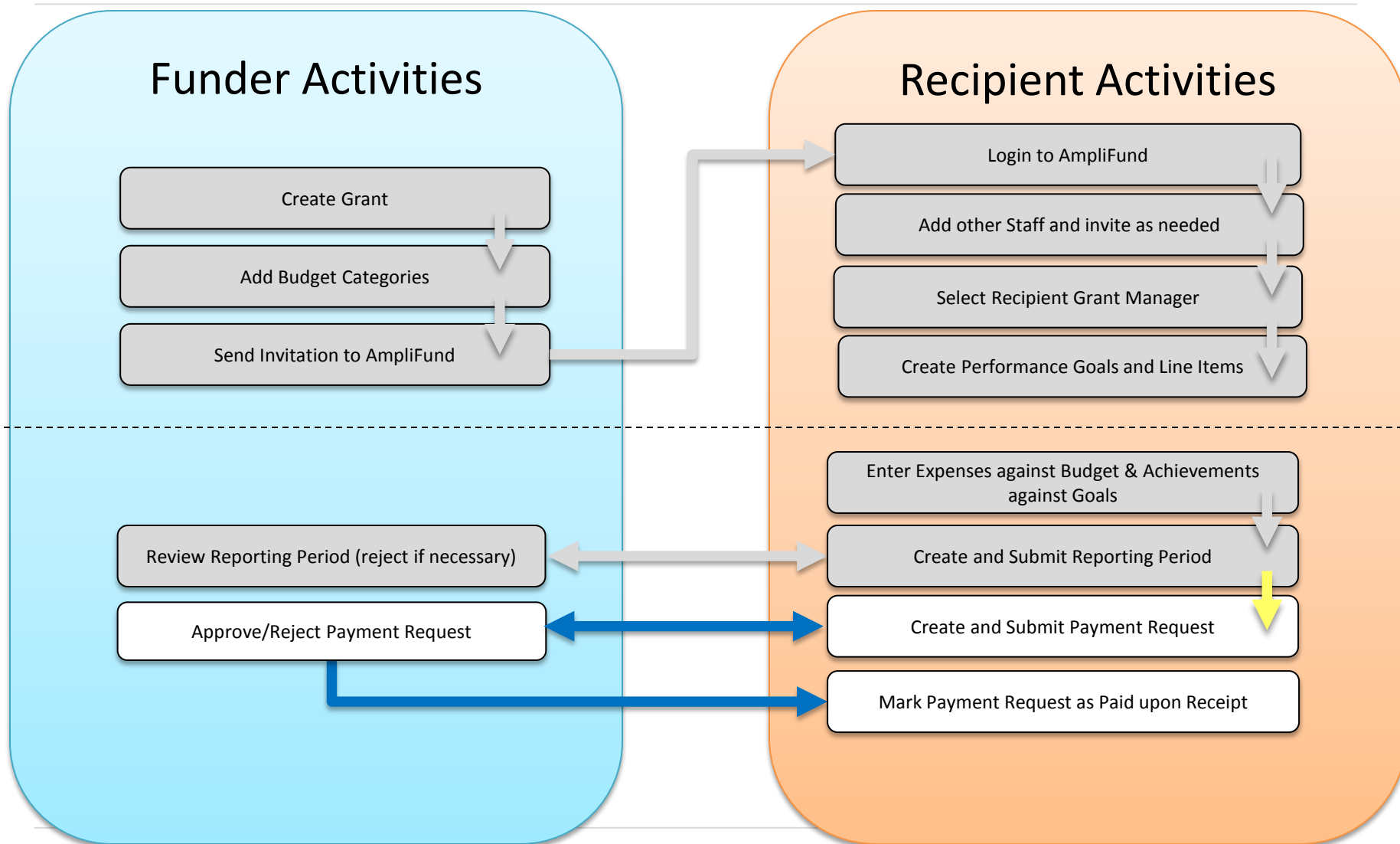
Cancel Close Save



## Creating & Submitting Payment Requests

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

# Payment Request Process Overview



# Payment Request Overview

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- 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                 | 09/30/2017               | Budget               | Open   |
| 10/01/2017                 | 12/31/2017               | Budget               | Closed |

### Payment Request

Name\*

October Payment Request

Which closed tracking periods would you like to include?

10/01/2017-12/31/2017 x

Is this a final payment request?

☐ Yes

Cancel Create

# 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

Additional Expenses   +

Net Costs \$2,017.00

**Totals**

Net Total \$2,017.00

Requested Amount\*

**Details**

Comments

Attachments  No file chosen

**Payment Request History To Date**

Total Amount Requested to Date \$690.00

Total Amount Received to Date \$0.00

# 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**

| Totals           |            |
|------------------|------------|
| Net Total        | \$7,800.00 |
| Requested Amount | \$7,800.00 |
| Approved Amount  | \$7,800.00 |

| Details            |  |
|--------------------|--|
| Recipient Comments |  |
| Attachments        |  |

| Payment Request History To Date |        |
|---------------------------------|--------|
| Total Amount Requested to Date  | \$0.00 |
| Total Amount Received to Date   | \$0.00 |

Mark as PaidCancel

# Email Notifications

All system generated emails are  
sent from  
[no-reply@gotomygrants.com](mailto:no-reply@gotomygrants.com)

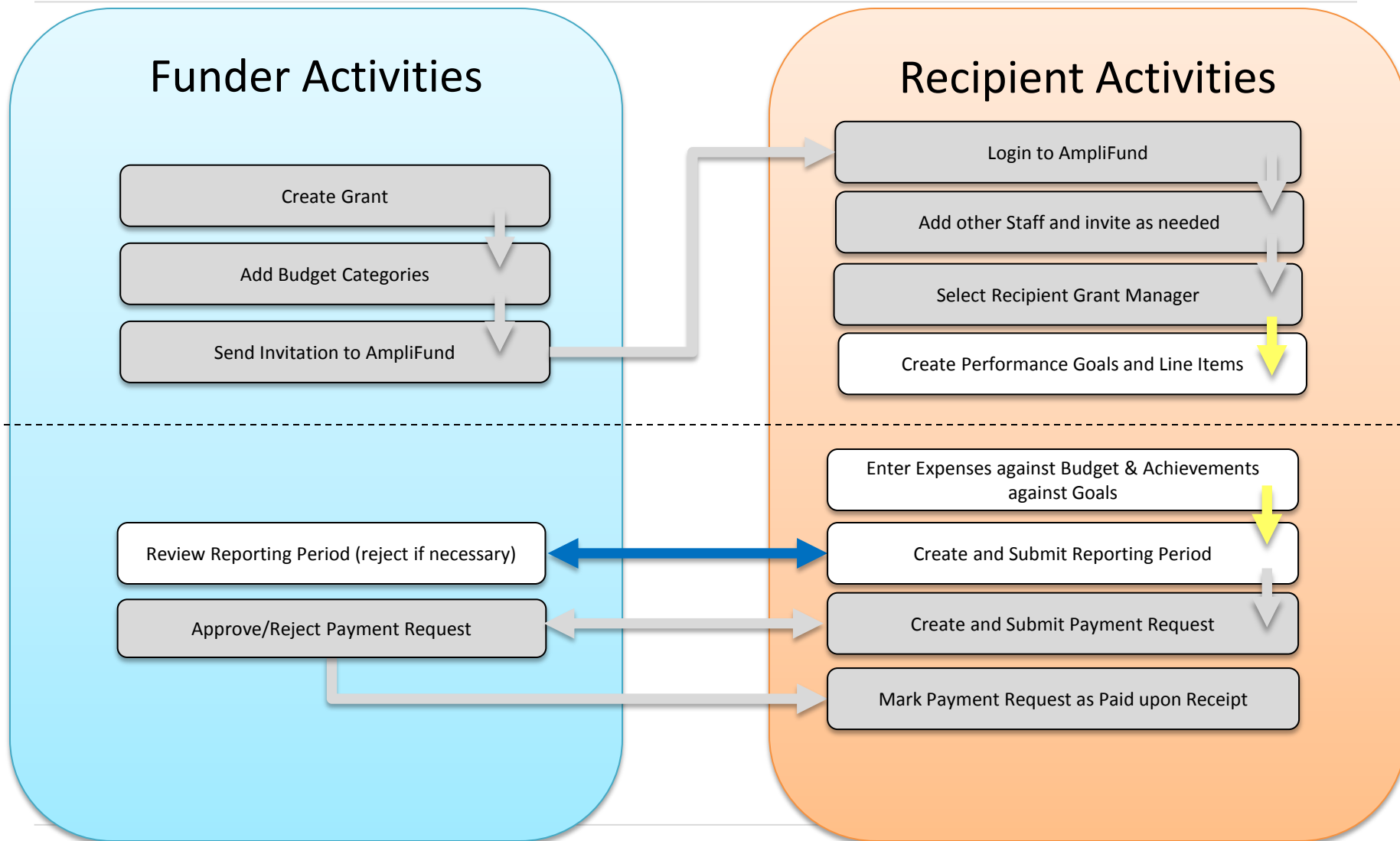
- Automated emails sent:
  - To funder upon payment request submission
  - To grantee if payment request is rejected
  - To grantee if payment request is approved



## Creating & Managing a Performance Plan

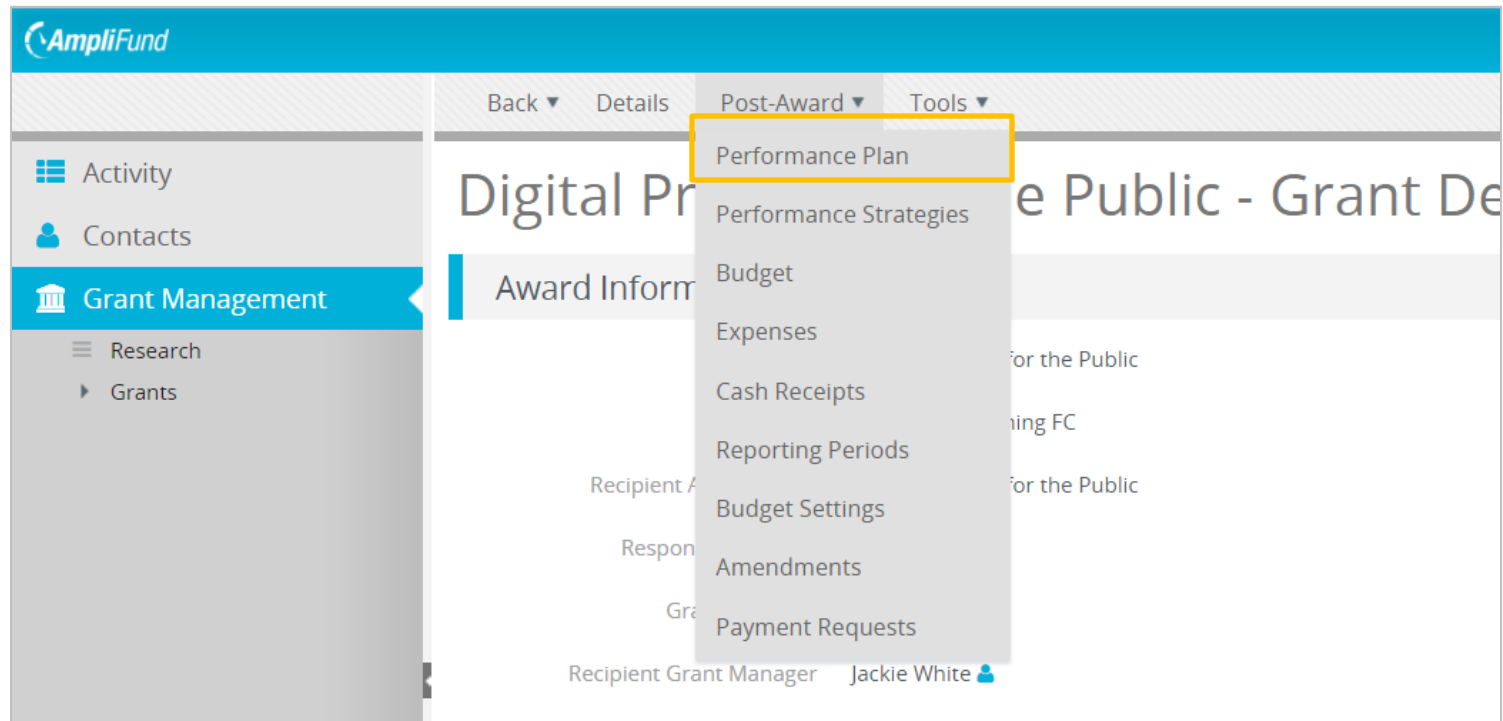
- Accessing the Performance Plan
- Adding Performance Goals
- Tracking Achievements on Performance Goals
- Security for Tracking Achievements on Performance Goals
- Creating & Closing Performance Reporting Periods

# Performance Plan Process Overview



# 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

**Add to Performance Plan**

**General** | Allocations | Attachments

Strategy: No Strategy

Goal Type: Numeric

Name\*: Individuals Served

Description:

Responsible Type: Individual

Responsible Individual\*: Select Individual...

Number To Be Achieved\*: 150

Cancel | **Save**


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

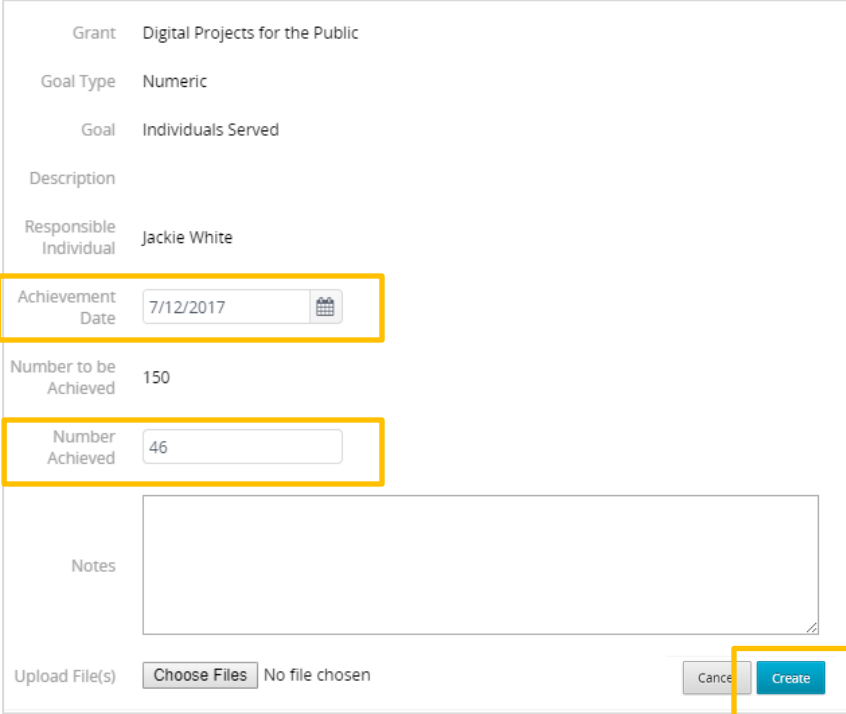
# Tracking Achievements on Performance Goals

## 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**



The screenshot shows a pop-up window for adding achievement details. The fields are as follows:

|                        |                                                                                               |
|------------------------|-----------------------------------------------------------------------------------------------|
| Grant                  | Digital Projects for the Public                                                               |
| Goal Type              | Numeric                                                                                       |
| Goal                   | Individuals Served                                                                            |
| Description            |                                                                                               |
| Responsible Individual | Jackie White                                                                                  |
| Achievement Date       | 7/12/2017  |
| Number to be Achieved  | 150                                                                                           |
| Number Achieved        | 46                                                                                            |
| Notes                  | <div></div>                                                                                   |
| Upload File(s)         | <input type="button" value="Choose Files"/> No file chosen                                    |
|                        | <input type="button" value="Cancel"/> <input type="button" value="Create"/>                   |

Yellow boxes highlight the Achievement Date, Number Achieved, and the Create button.

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

# Security for Tracking Achievements on Performance Goals

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## 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**

**Tracking Periods**

Which grant would you like this closeout to apply to?  
Active Living: Bicycle and Walking Trails

What types of tracking periods would you like to include?

☐ Expenses

☒ Achievements

What period of time would you like to close?

Select a time period... ▼

Cancel Save



## Support Procedures & Details

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

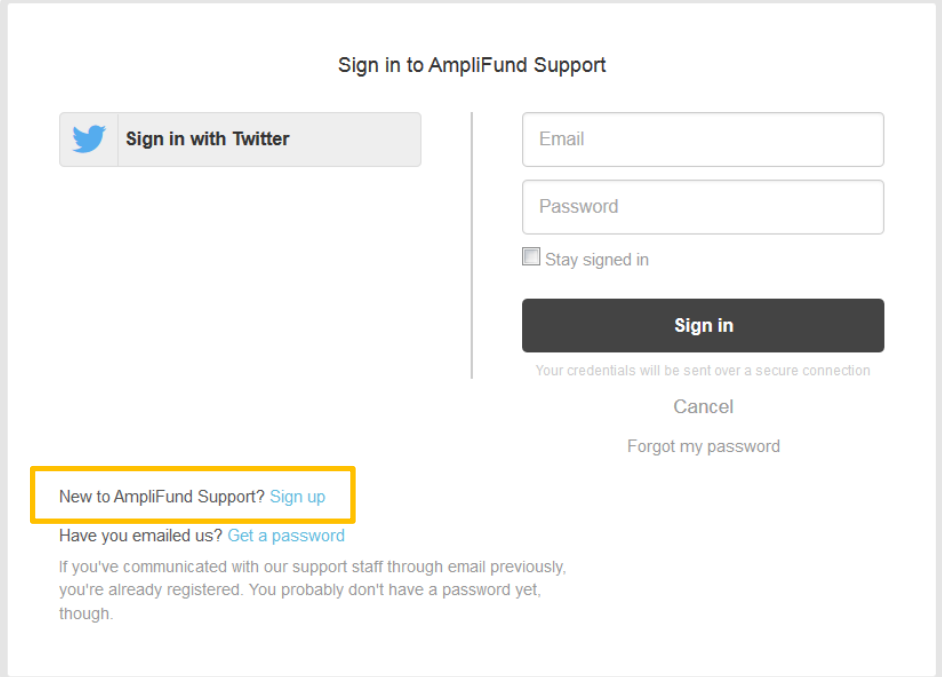
# Support Procedures

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- **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](mailto:support@amplifund.zendesk.com) will be sent to you via email
8. Click the link to set your password



Sign in to AmpliFund Support

 Sign in with Twitter

Email

Password

☐ Stay signed in

**Sign in**

Your credentials will be sent over a secure connection

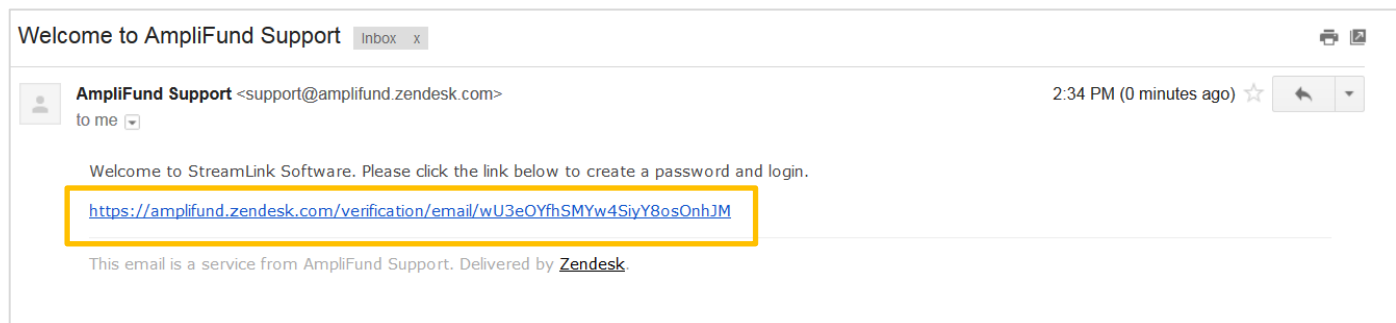
[Cancel](#)

[Forgot my password](#)

New to AmpliFund Support? [Sign up](#)

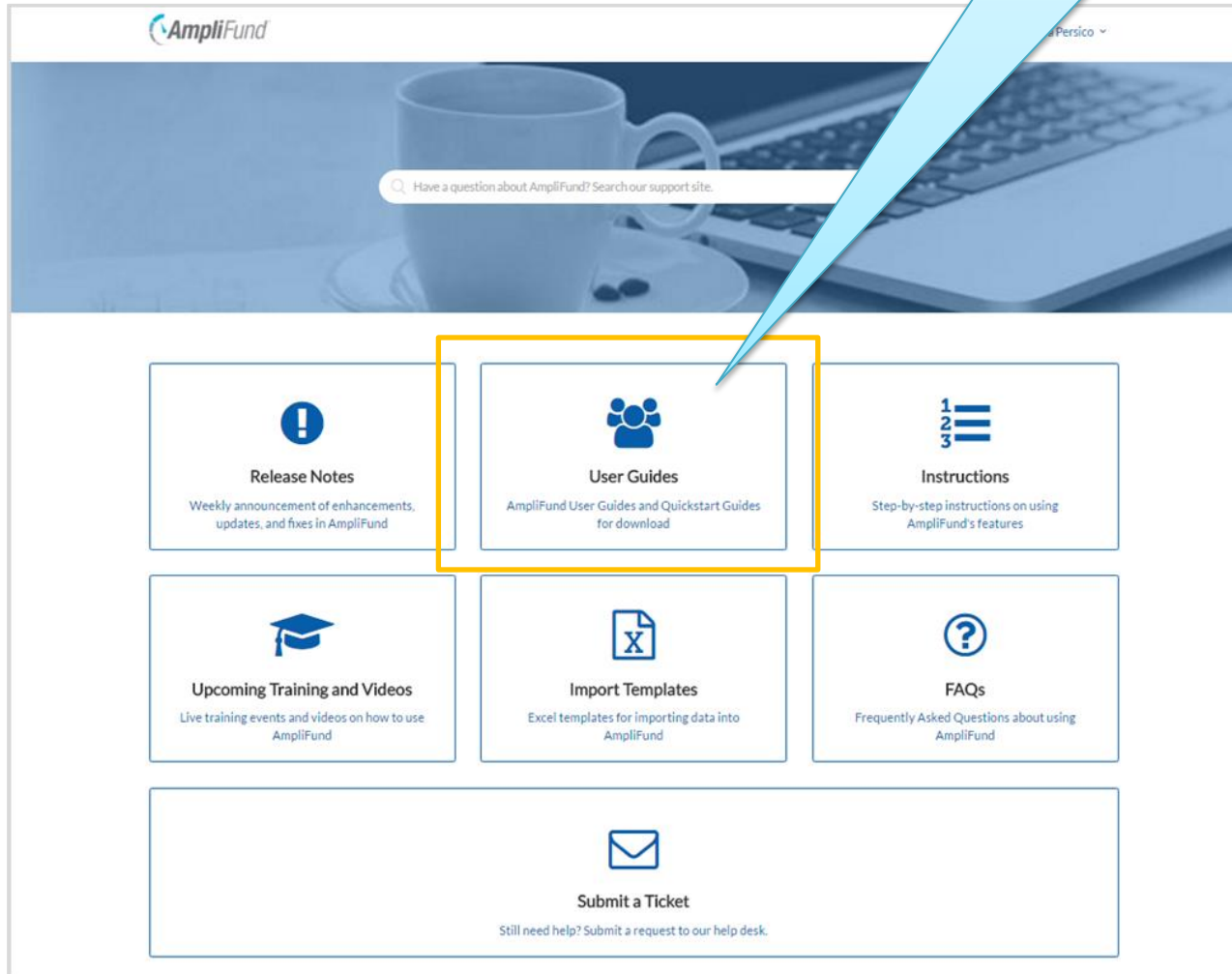
Have you emailed us? [Get a password](#)

If you've communicated with our support staff through email previously, you're already registered. You probably don't have a password yet, though.



# Accessing AmpliFund Documentation

**User Guides** available on the AmpliFund Support Site



# AmpliFund Reference Materials and URLs

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## 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](http://www.gotomygrants.com)
- AmpliFund Support Site: <https://amplifund.zendesk.com>

# Contacting AmpliFund Support

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## Customer Success

Submit a support ticket: [support@amplifund.zendesk.com](mailto: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+)