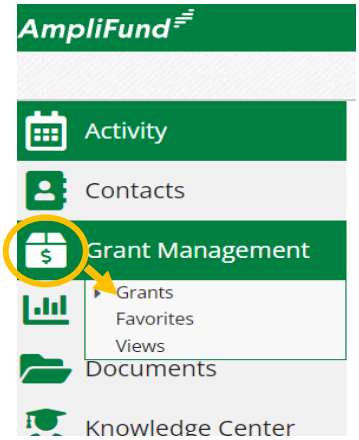
AMPLIFUND 10/17/2022

Quick Reference Guide for Grant Recipients

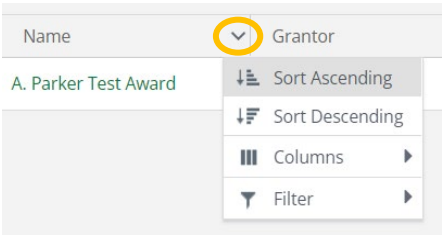
Begin by logging in at https://gotomygrants.com

Locate Your Grants

Using the navigation menu on the left side of the screen, click on the box icon with a $ symbol and then select "Grants." This will show a list of all the grants awarded to your organization in AmpliFund. Click on the name of your award to see the details of each specific award.

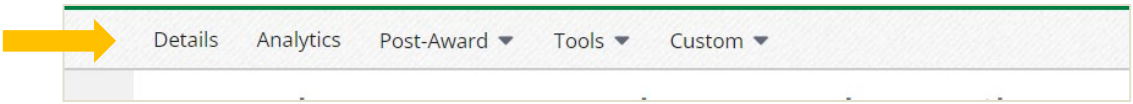


Clicking the down arrow after any column header will let you sort and filter your awards, if needed.



Navigating Within Your Grant

Within each grant, use the top menu bar to access different portions of your grant.



Details	This tab provides a summary of the award amount, start and end dates, match requirements, if any, as well as the amount spent, the amount invoiced, and the remaining funds.
Analytics	This tab opens a visual dashboard of the grant, as well as quick links for creating achievements, expenses, and other actions.
Post-Award	This tab opens a menu to access the Financials (Budget and Expenses), Performance (Plans and Achievements), Cash Flow (Payment Requests), Management (Reporting Periods and Amendments), and Settings.
Tools	This tab opens a menu to access Tasks, Documents, and Notes. The public folder within Documents is where you can find important documents from your funding department.
Custom	This tab provides access to any custom forms or reports that the grant awarding department has assigned to the grant.

Assigning Staff to a Grant

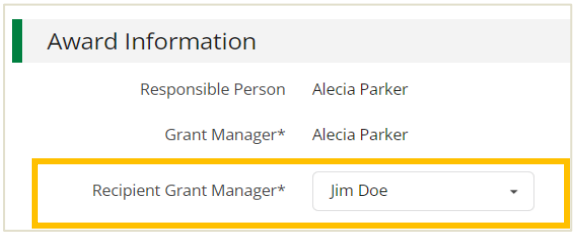
Organization Admin Users are responsible for assigning staff users to a grant. Without being assigned to a particular grant, staff users will not be able to see or interact with an organization's grant. Some organizations may choose to assign multiple people the Organization Admin user role, and these users can see and manage all grants awarded to the recipient organization.

- There are two options for assigning staff to a grant:

RECIPIENT GRANT MANAGER – This person can see and do everything related to a particular grant. They have the responsibility of entering and reviewing expenses, closing reporting periods, submitting quarterly payment requests, and entering budget amendments, if needed. Only one recipient grant manager can be assigned per grant.

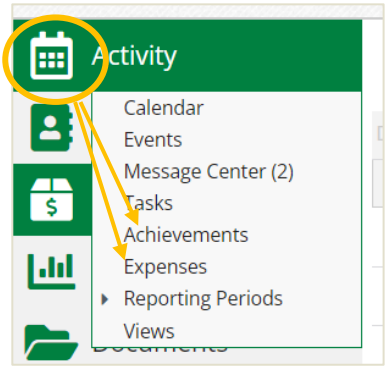
- To assign the Recipient Grant Manager: Click on the name of the award to open it. Then click on the *pencil icon* in the upper right corner to edit the Award Details.
- Then select the staff user from the drop-down list. Click Save at the bottom of the page.

  **Note: Only staff who have already been set-up as a user in your recipient account will appear on the list.*

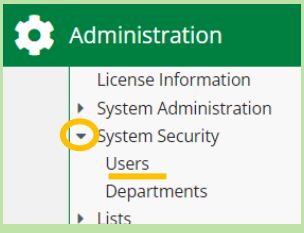


RESPONSIBLE PERSON – Users can be assigned to specific activities within the grant. This allows staff users access to enter and view certain information related to a grant without seeing the whole grant.

- Activities to which you can assign a Responsible Person:
  - **Budget Line Items** = This allows a user to enter expenses against that line item. Users can be assigned this responsibility by clicking the pencil icon next to each line item in the budget.
  - **Performance Plans (Goals)** = This allows a user to enter achievements (progress reports) against the Performance Plans for the grant. Users can be assigned by clicking the pencil icon next to the name of each goal in the performance plan



** Note: Users that only have this designation will not be able to see the grant in the grant management section. Instead, they will access their responsibilities through the Activity Menu, as seen in picture.*

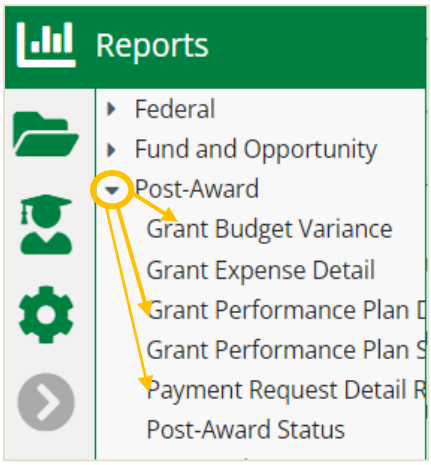


If you need to **add new staff** users to your account, an Organization Admin will need to add them under the Administration menu.

- Start by clicking the carrot next to System Security, then select Users. Additional instructions are available, if needed.

Reporting Tools to Help Manage Your Grant

AmpliFund includes several built-in reports to help you keep tabs on your grant. You can access these reports from the Reports menu on the left navigation bar, and then opening the Post-Award section.



Grant Budget Variance = Provides a grant's variance between the planned budget and the submitted expenses.

Grant Expense Detail = Displays a list of all expenses associated with the grant.

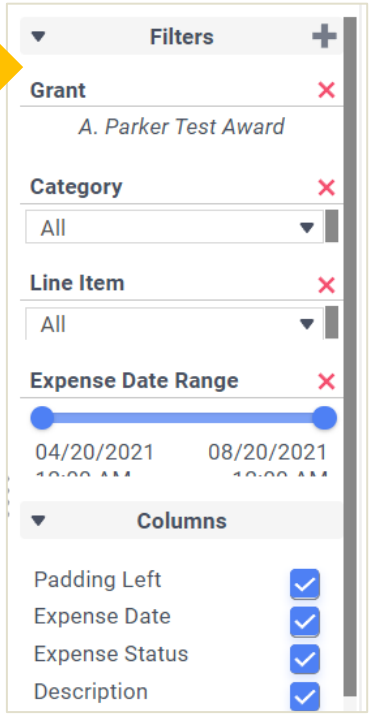
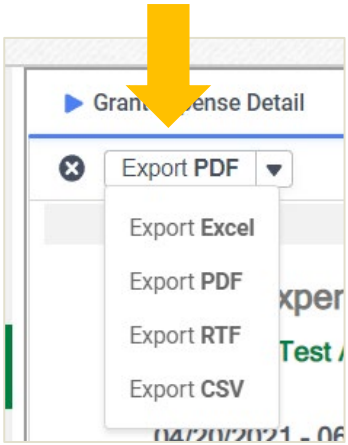
Grant Performance Plan Detail = Provides a detailed report of all the performance plan goals and achievements that have been created for the grant.

Grant Performance Plan Summary = Provides a summary report of the performance plan goals and achievements.

Payment Request Detail Report = Provides both a summary and a detailed report of the payment requests that have been created, and the expenses tied to each.

Post-Award Status = Provides and overview of the entire grant including award risk, status, and key dates.

Filters: Use the filter options on the right side of each report to show or hide different information.



Export: Once the report includes the information you want, use the export menu in the upper left corner to export the results in PDF, Excel, Rich Text Format (RFT), or CSV formats.