



AmpliFund Instructions for FWP Recreational Trail Program Grant Recipients

Updated on 9/15/2021

Logging into AmpliFund

- 1) If this is your first time logging in, you should have received an email from AmpliFund inviting you in. If you need another email sent to you, please contact me (if you are the primary user on your account) or your organizational account administrator (if you are a secondary user on your account).
- 2) If you have already logged in and set up your account once, you can now use the <https://mt.amplifund.com> to login.

Adding New Users

- 1) At FWP, we cannot add new users for you. Your organization is responsible for adding, removing, and managing its own users.
- 2) To add a new user:
 - a. Log in to Amplifund.
 - b. On the left toolbar, scroll to the bottom.
 - c. Choose the *Administration* tab.
 - d. Hover over *Administration*; then, choose *System Security*. From *System Security*, choose *Users*.
 - e. In the new page, click the + icon in the upper right corner.
 - f. Fill in the appropriate information.
 - g. Choose the type of security role. Those roles, and their respective access, are:
 - i. **Organizational Admin:** Can create, view, and edit all records in the account.
 - ii. **Executives:** Can view all records in the account.
 - iii. **Department Admin:** Can create, view, and edit all grant records linked to their department(s).
 - iv. **Department User (Salary):** Can view all grant records linked to their department(s).
 - v. **Department User (No Salary):** Can view all grant records linked to their department(s), excluding budget personnel line items.
 - h. Fill out the rest of the fields as appropriate.
 - i. Click *Create*.
 - j. In the Icon Bar, click the mail icon (an envelope icon) to send an automated email to the user to invite them into the system.
 - k. In the popup window, click *Send Invitation*.

Tasks in AmpliFund

All RTP subrecipients (with the exception of closed, nearly closed, or any 2018 extended grants) have a series of tasks to complete.

Tasks are actions assigned to you with set due dates. For most RTP subrecipients, the tasks you have assigned to you are:

- 1) Assign a Recipient Grant Manager
- 2) Submit a Status Report (if a 2019 or 2020 grantee)
- 3) Submit a Payment Request (a claim)

You will also have a performance period tracking reports due in your tasks section. Since your status reports have not been migrated over for you, for open 2019 and 2020 awards, you may have past due reporting. You can clear the tasks assigned to those past due reports.

To see the tasks assigned to you,

- 1) Go to the top toolbar.
- 2) Click *Tools*
- 3) From the dropdown, click *Tasks*.
- 4) To see all tasks (assigned to everyone under this grant), toggle the *My Tasks* off. To just see tasks assigned to you, keep this on. Users at the organization level can create tasks for their internal users.
- 5) First, we will clear all the old performance reporting period tasks. To do so,
 - a. Select the old, past due ones in the far left column. Then, click the check mark to the right of the name of the task. This will mark it as complete. From here, you can then filter your view to not include "Completed" tasks.
- 6) This should leave a few future tasks for you.
- 7) The first is to "Assign a Recipient Grant Manager". This will be the primary individual on this award, and our main contact. If that is not you, you can add an additional user if the user is not already in your organization's system.
 - a. To assign a Recipient Grant Manager, go to your grant under *Grand Administration* (in the far left toolbar), and then *Grants*, and then into the grant you wish to change.
 - b. Click the *Details* page in the top toolbar.
 - c. Scroll down this page.
 - d. Under *Award Information*, you will see a blank next to *Recipient Grant Manager*.
 - e. In the upper righthand corner, click the pencil icon (Edit).
 - f. Scroll back down. There should now be a dropdown to choose who this Recipient Grant Manager should be. If someone isn't there, you will need to add a new user.
 - g. Once filled, click *Save*.

Submitting Status Reports/Achievements in AmpliFund

For all RTP awards, a status report is due every six months.

For the time being, we will be accepting status reports via email. This includes final reports. A status report form, which can be filled out and sent in, can be found at the end of this guide. It can also be found on the RTP webpage.

Please note that we have left your Performance Plan up in AmpliFund. We may be transitioning back to AmpliFund for status reports in the future. Thank you for your patience.

Accessing grant budgets and submitting payment requests

Your grant budget has been imported for you. Categories in AmpliFund are slightly different than WebGrants. There are some other important distinctions to keep in mind with AmpliFund, and a few general reminders:

- You MUST meet the match illustrated in your overall budget. We may have revised your match down for you if it was exponentially more than the required minimum of 25% of your award (or 20% of your total project—these two formulas should equal the same number if you are supplying the minimum amount of match).
- You cannot incur expenses outside of any budget category you see in your budget, no matter how little, without prior permission from your program manager.

To see your approved grant budget:

- 1) Navigate to the top toolbar.
- 2) Hover over *Post-Award* and then *Financial* and then *Budget*.
- 3) Your approved budget will open in a new page.
- 4) We recommend that, in the middle top, you click the checkbox next to *Match*. This will show your required match per line item.
- 5) Your budget does not update in real time. It is static.

To see expenses approved against your budget,

- 1) Navigate to the top toolbar.
- 2) Hover over *Post-Award* and then choose *Financial* and then *Expenses*.
- 3) In the new window, under *Options* (middle right side), we recommend checking the following:
 - a. Budget Category
 - b. Total Expensed
 - c. Cash Match
 - d. Line Item
 - e. Total Budgeted
 - f. Total Remaining
 - g. In Kind
- 4) Click *Run*.
- 5) This will show you all entered expenses against specific line items, along with the remainder in each. Keep in mind that:
 - a. *Total Budgeted* is your match plus your award for a specific line item.

- b. *Total Expensed* is the amount approved against your award (what has been reimbursed to you).
- c. *Cash Match* and *In-Kind Match* is the match that you have provided.
- d. *Total Remaining* is the Match plus your Award remaining for each line item.

Keep in mind that your project manager adds in your expenses after reviewing and approving a submitted payment request. This may take several days or weeks after you submit a payment request.

Alternatively, you can run a prefabricated report to see your “live” budget. This report does not have the level of detail that the Expense Report does, but it does offer more functionality in terms of understanding the remaining funds in your grant award. To run this report:

- 1) Navigate to the lefthand toolbar (you do not need to be within your grant award to do this; you can be on the home screen).
- 2) Go to *Reports*.
- 3) Click the tiny side arrow next to *Post-Award*.
- 4) In the expanded dropdown, click *Grant Budget Variance*.
- 5) This will open up a new page with a prefabricated report. **Note:** if your organization has more than one active award in AmpliFund, this report will generate a one-page report for each active award. To navigate between awards, find the tiny page number/report number arrows in the middle upper right corner of the page (the upper righthand corner of just the report). This will show you a “1/x”, with “x” being the number of active awards—and one-page reports—that have been pulled through this prefabricated award. Use the little arrows to navigate to the award you wish to view.
 - a. In this report, the *Budgeted* columns are associated with your approved budget.
 - b. The *Actual* columns are associated with the expenses approved *against* your approved budget.
 - c. The *Actual Spend Down* shows you the percentage of budgeted funds you have “used” per budget category. This combines your match and awarded funds.
 - d. The *Budget Variance* shows you the remainder of match and awarded funds left per budget category. This number starts as a negative and works up to a “0”. Assuming that you spend all awarded funds and provide all match, this number will reach “0”.

Submitting a Payment Request

In AmpliFund, claims are called payment requests.

To submit a payment request,

- 1) Login to AmpliFund.
- 2) Go to *Post-Award* on the top toolbar.
- 3) Go to *Cash Flow*.
- 4) Click on *Payment Requests*.
- 5) In the upper right, click the + to start a payment request.
- 6) In the new page, name the payment request. We recommend naming it sequentially (Claim 1, 2, 3 etc.) or by date and your award number. So, RTP2102 072321, for instance.
- 7) The *Date Created* should be the date you are submitting the payment request.

- 8) *Payment Type* should ONLY be “Reimbursement”.
- 9) Under the *Financial Detail* subheading:
 - a. Under *Additional Expenses*, enter the categories on your budget that you are requesting reimbursement for AND that your match expenses will be drawn from. These should autopopulate once you start typing. **You can choose multiple categories at once.**
 - b. Every autopopulated budget category will ask you for the amount of expenses assigned to each category. Keep in mind that the number you enter here is your reimbursement + match expenses for each category. Make sure that you are not entering a number for more than you have available in your budget.
 - i. **Tip:** have your Expenses or Grant Budget Variance report open in a separate tab, so you can view your remaining balance by category.
 - c. Under *Contributions*, enter your match contributions.
 - i. Remember that, for RTP, your match MUST be 25% of your requested reimbursement for every reimbursement. AmpliFund also requires that you fully meet the match listed in your overall budget before closing out the award. You may need to include slightly more match than 25% in order to accomplish this.
 - ii. The match contribution you enter will automatically be subtracted from the *Net Cost* section. A new *Net Total* will autopopulate.
 - d. Under *Total*, enter the *Requested Amount* (which is the amount you want to be reimbursed for). This number should match your *Net Total* in the line above.
- 10) Under the *Additional Information* section:
 - a. In *Comments*, describe your payment request and your intentions with it. This will help us understand how your expenses should be allocated.
 - b. Under *Attachments*, add all attachments necessary for your payment request. As a reminder, all FWP grants require that:
 - i. You show proof of payment (cancelled check, a time and effort log, etc.).
 - ii. You show invoices and receipts (that align with your proof of payment).
 - iii. If necessary, you upload any and all procurement documents and contracts.
 - iv. You upload any and all logs necessary (volunteer logs, grooming logs, etc.).
 - v. **If you are a federal entity, a Bill of Collections and accompanying documentation is required.**

Requesting amendments

- 1) In AmpliFund, amendments can be accepted for four different reasons to negotiate changes to an award. Those are:
 - a. Award Amount: this is only used immediately after award, if a revised award amount than submitted with the application is necessary.
 - b. Duration: this is an Extension Request.
 - c. Budget Categories: this would include adding a new category, moving funds between categories, etc.
 - i. For the time being, any movement between categories, or within categories, needs an approved amendment. In the past, we allowed up to 10% movement between approved categories without any necessary approval. We may return to this, but for now, submit an amendment for any proposed change.

- d. Program Goals: this would include changing a performance goal, if it is no longer attainable, or if the project has changed to such a degree that it is no longer applicable.
- 2) To submit an amendment:
 - a. Go to *Post-Award*.
 - b. Hover over *Management*.
 - c. Choose *Amendments*.
 - d. Click the + icon in the upper righthand corner to create an amendment.
 - e. In the new window, choose the type of amendment that you are submitting (one of the four previously described).
 - f. Fill out the amendment request as necessary.
 - i. Some users are experiencing a glitch with amendments. The full form for the amendment does not display immediately. Instead, an abbreviated form displays. To ensure you submit the complete form, fill out the first page you see. Then, *Save*. Then, on the page that it takes you back to, click the green pencil icon (*Edit*). If you are a user experiencing this glitch, the full form will now display.
 - ii. The more information you include, the better. Keep in mind that all of your amendment requests need to be well-supported, reasonable, attainable, and for good cause. Amendments will be either approved or denied. Unlike Payment Requests, revisions will not be requested or accepted.
 - g. When finished, press *Submit* to submit to your program manager.

Help & Support

- 1) For program-specific questions, reach out to your program manager.
- 2) For general AmpliFund questions, we recommend first watching the recipient video series available on our AmpliFund resource page here: <https://fwp.mt.gov/aboutfwp/grant-programs/amplifund-resources>
 - a. In order to view the videos, you will need to set up a separate Zen Desk account. For ease, we recommend using your same credentials that you have for your general AmpliFund account.
- 3) There is also a help feature within your AmpliFund account. At any point, click the “i” icon to open a help request window. If you submit a request, AmpliFund will reply to you within a few hours (assuming that you request help within their business hours).

Reminders:

- 1) AmpliFund is a new system. We ask for your patience as we, too, learn the system.
- 2) The migration continues. Not all of your documents are in AmpliFund. If you need anything, ask, and we can grab it from WebGrants for you.
- 3) WebGrants is no longer in use. We will not accept claims via WebGrants.
- 4) If you have any questions, always feel free to reach out.



**Montana State Parks Recreation Grants
Semiannual Status Reporting**

Grant recipients are required to provide reporting on funds received.

Grant Recipient Contact Name:	
Grant Recipient Organization Name:	
Grant Program:	
Grant Year:	
Reporting Period:	

Respond to all questions below. Responses must be detailed and specific to the grant and reporting period.
Those with multiple FWP grant awards must report separately and uniquely on each grant.

<p>1. What were your project accomplishments during the reporting period?</p> <p>2. What problems or barriers did you encounter within the reporting period that prevented you from reaching your goals or milestones?</p> <p>3. Are you on track to programmatically and fiscally complete your program as outlined in your grant application? (Please answer either "Yes" or "No". If "No", please explain.)</p> <p>4. What percentage of your project is complete?</p> <p>5. What major project activities are planned for the next six months (the next reporting period)?</p> <p>6. Do you require technical assistance from FWP as it relates to your grant and/or project?</p> <p>Additional Comments:</p>

FWP Use Only

FWP Approving Officer Name:
Date of FWP Approval: