

Hawaii County, HI Recipient Training

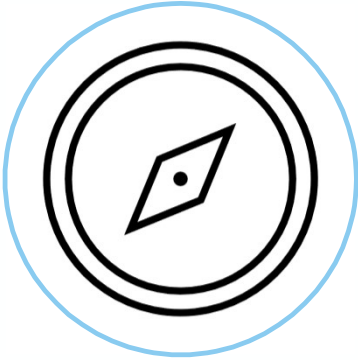
March 19, 2025

Agenda and Session Objectives



Logging In

Activation Email, Log In Credentials, Updating Account Information



General Navigation

Site Overview, Accessing Grant Records, Adding Organization Users



Grant Monitoring

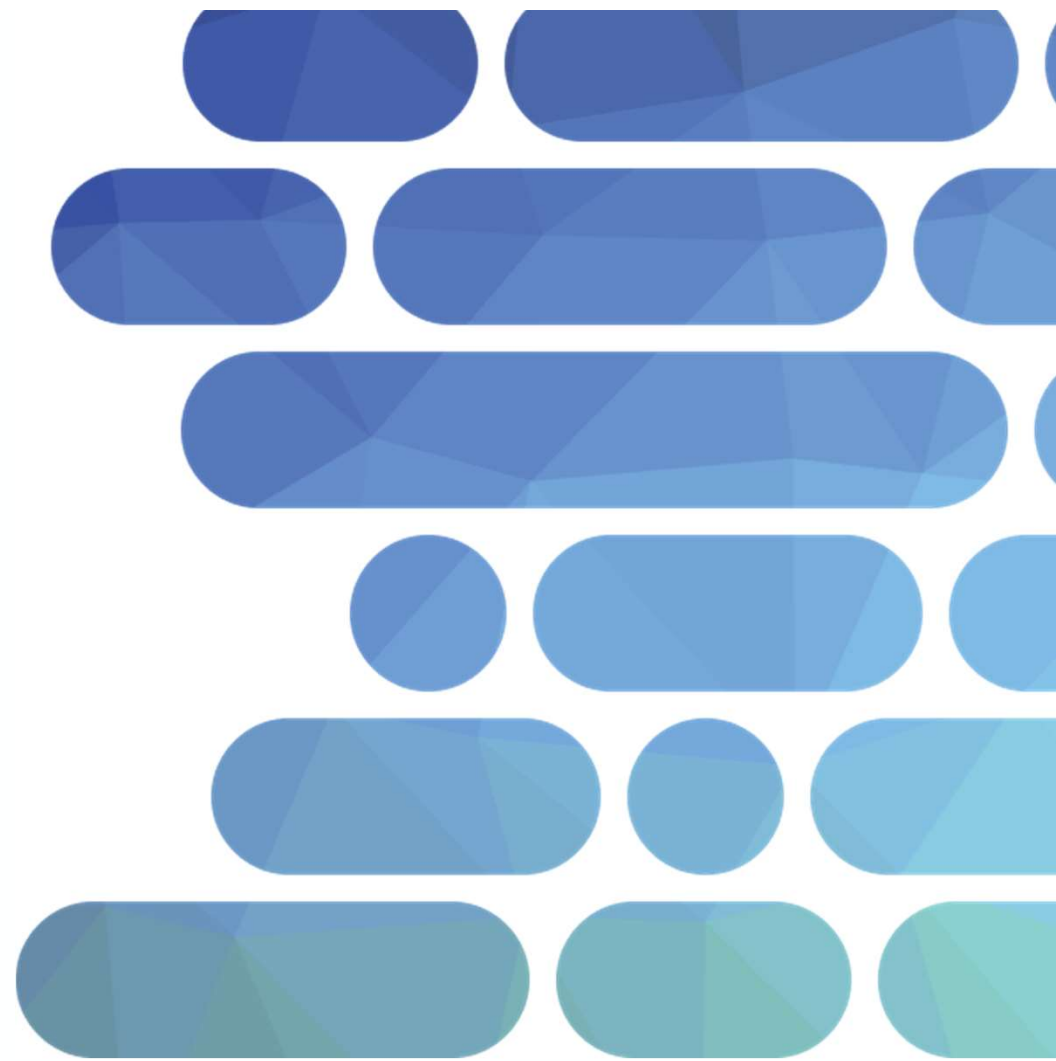
Understanding and Updating Grant Record, Accessing Budget and Tracking Expenses, Reporting



Questions and Support

Q&A, Accessing AmpliFund Support Site and Resources, Submitting a Help Ticket

Activation and Account Set Up



Activation Email

- When you receive an award, your funder will send you an email notification inviting you into AmpliFund.

o [no-reply@gotomygrants.com](mailto:reply@gotomygrants.com)

The image shows a screenshot of an email from AmpliFund. The email content is as follows:

AmpliFund

Hello **Admin**,

You are receiving this notification because your organization has been given an award from **Funder Name**

This award of 1 years 0 months 0 days begins on 4/4/2023.

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
Idaho Department of Environmental Quality

AmpliFund is the leading enterprise grant management platform designed for nonprofit and public sector organizations to manage every phase of the grant management process.

Annotations with arrows point to the following elements:

- Name of Account Owner**: points to "Admin"
- Funder**: points to "Funder Name"
- Period of Performance**: points to "1 years 0 months 0 days begins on 4/4/2023"
- Link if you have an account**: points to "login"
- Link to register**: points to "this link"

Register

- First Time in AmpliFund

Click on 2nd Link in Email



Hello Admin,

You are receiving this notification because your organization has been given an award from Idaho Department of Environmental Quality.

This award of 1 years 0 months 0 days begins on 4/4/2023.

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
Idaho Department of Environmental Quality

[this link](#)
Link to register

AmpliFund is the leading enterprise grant management platform designed for nonprofit and public sector organizations to manage every phase of the grant management process.

Create a Password

AmpliFund

Create Password

Email Address MainContact@noemail.com

New Password show

Confirm Password show

Submit Cancel

Log In

1. Log-in at:
<https://gotomygrants.com/account/Login.aspx>
2. Enter your Email
3. Enter your Password
4. Click Login

AmpliFund

Login

Email

Password show

Remember my email [Forgot your password?](#)

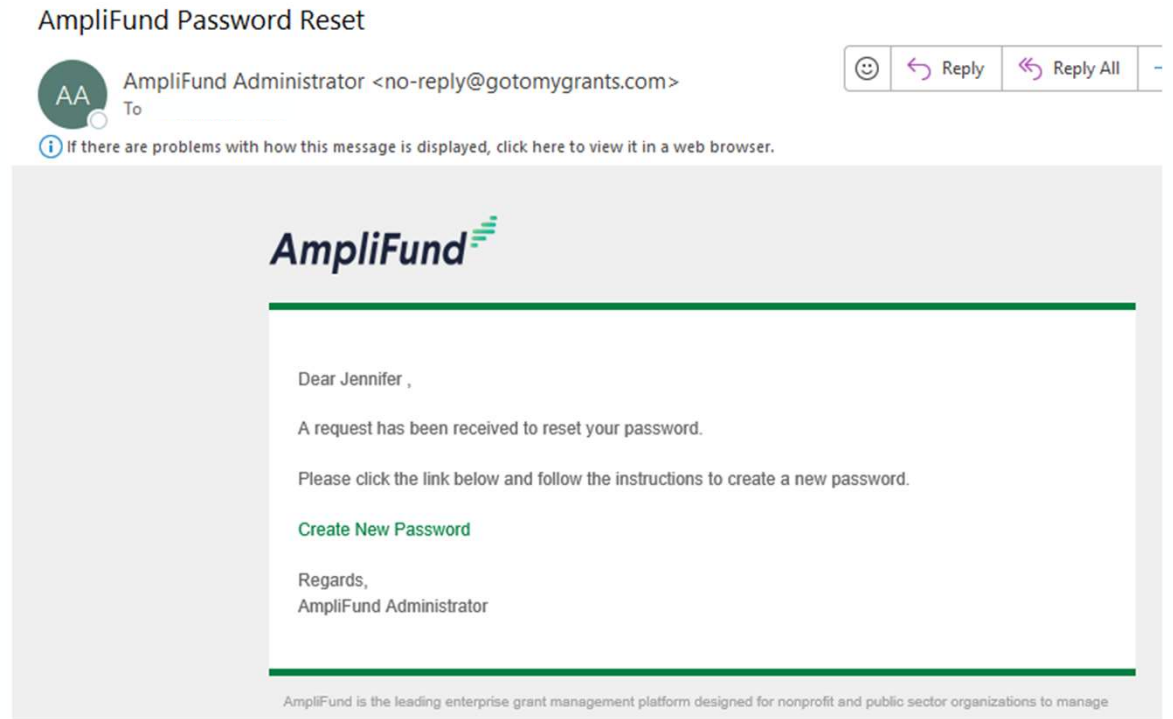
Log in with SSO

Login

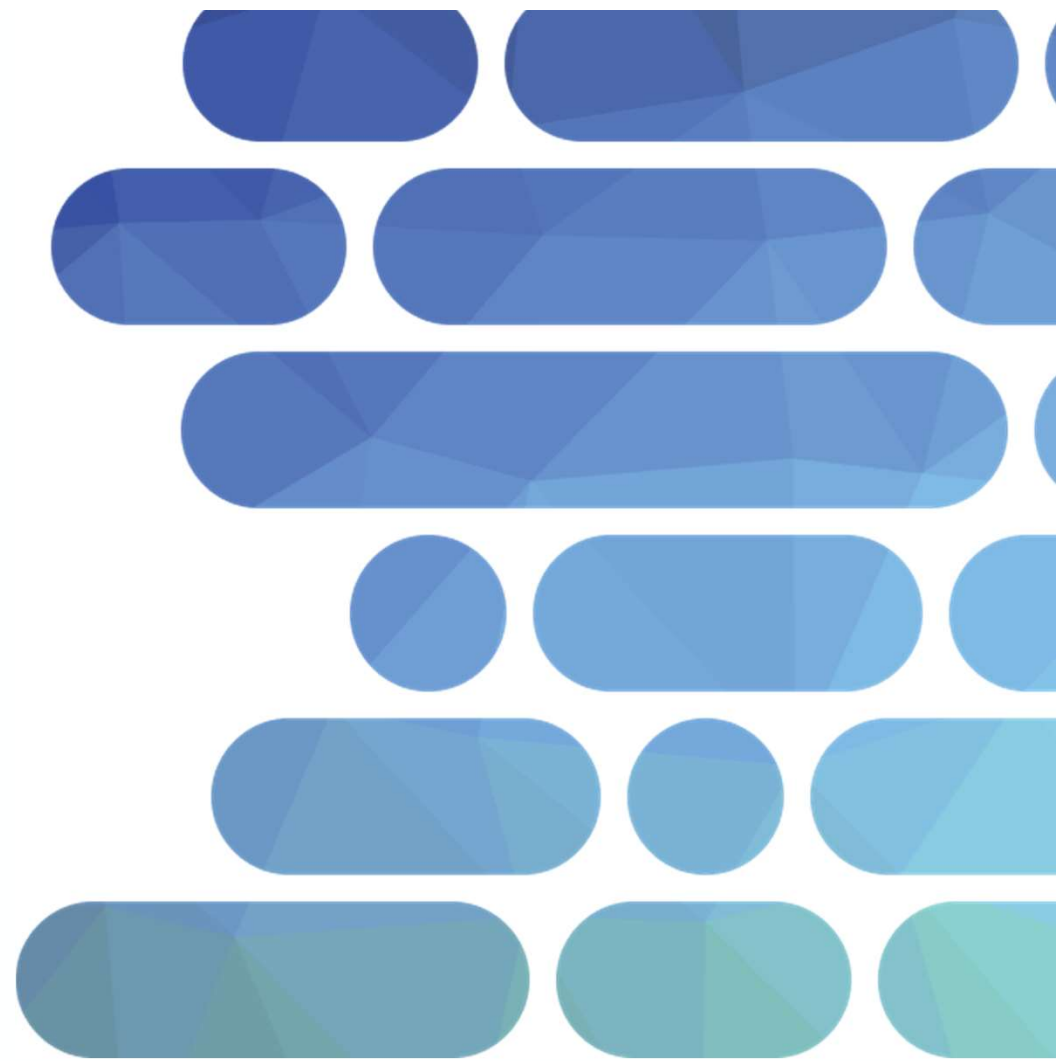
Send reset link from:
no-reply@gotomygrants.com

Password Reset

- Email from AmpliFund Administrator (no-reply@gotomygrants.com)
 - Need to add as safe sender
 - Check Spam, if not received

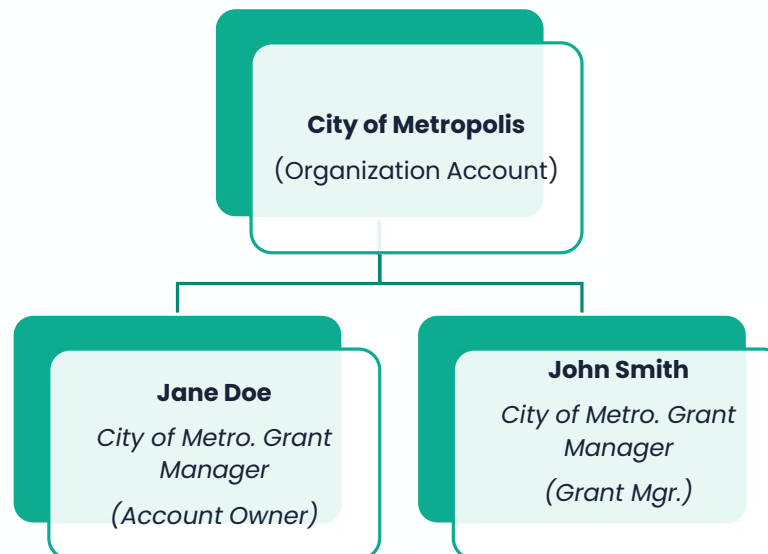


Adding Users



Your Account

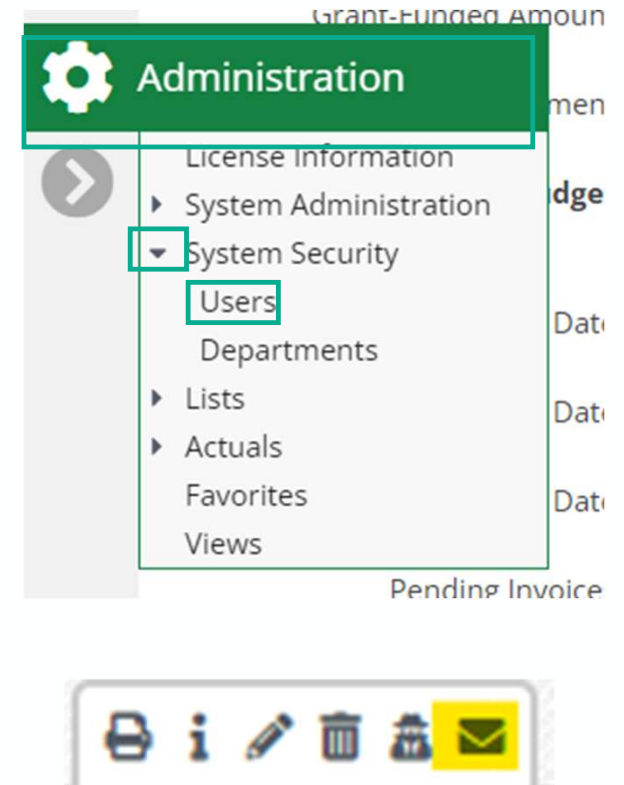
- City of Metropolis receives a grant
- Jane Doe is the account owner for the City of Metropolis.
 - Jane receives the Activation email
 - Jane needs to update the City of Metropolis' account information
 - Jane needs to add other users to the City of Metropolis' account



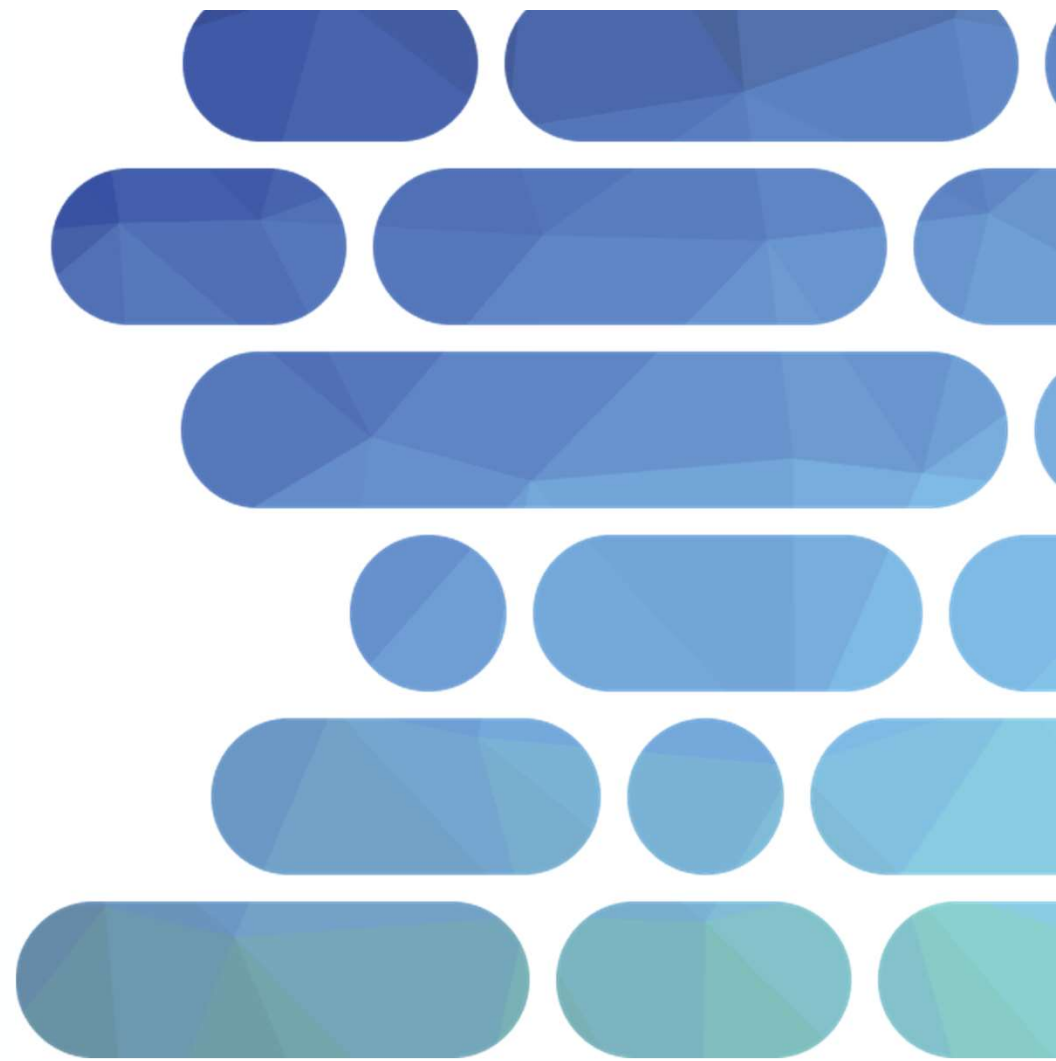
Each staff person has their own login credentials

Adding Users

- Best practice is to have at least two users in your account
- To Add Users:
 - Go to: Administration > System Security > Users > +
 - Required Fields:
 - First Name, Last Name
 - Role:
 - Email Address (Will be your Username when logging in)
 - Once Saved: **Send Invitation** (upper right icon toolbar) for user to receive email inviting them to log-in and establish password.



Accessing Your Grant



Editing Your Grant – Assigning a Recipient Grant Manager

- Left Menu > Grant Management > Grants > [Name] > Edit (pencil icon)
- To Do:
 - Assign a Recipient Grant Manager (*Required*)

Post-Award Information

Responsible Person Test User

Grant Manager*

Recipient Grant Manager*

Award Identification Number

RFID ID Number

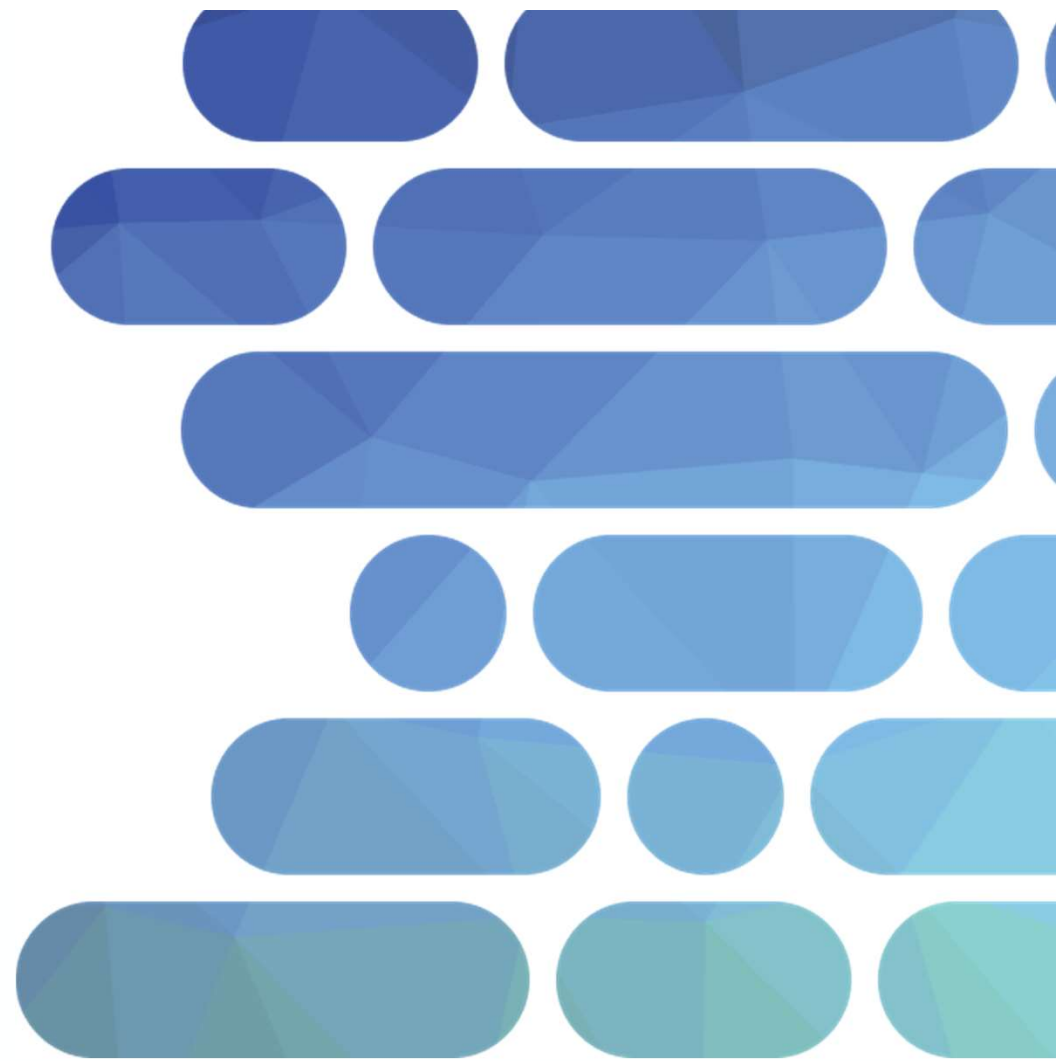
- Other Details (*optional*)
 - Recipient Award Name
 - Recipient Description
 - Unique Identifier

Award Details Screen

- *Award Details Screen:*
- Dynamic View Displays:
 - Award Amount
 - Total Expenses to Date
 - Amount Invoiced to Date
 - Buckets for Invoice Status'
 - Remaining Available Budget**
 - Based on Sum of Pending/Approved Payment Requests

Details	Analytics	Post-Award	Tools	Grant Workflow	Custom
Visit Oak Park - Award – Award Details					
Award Information and Status					
Name	Visit Oak Park - Award				
Recipient Name	Visit Oak Park				
Recipient Award Name	Visit Oak Park - Award				
Award Status	Approved				
Grant-Funded Amount	\$	209,042.00			
Match Requirement	\$	0.00			
Total Budget	\$	209,042.00			
Match Contributions To Date	\$	0.00			
Invoiced To Date	\$	0.00			
Pending Invoices	\$	0.00			
Approved Invoices	\$	0.00			
Payments Made To Date	\$	0.00			
Remaining Available Grant-Funded Amount	\$	209,042.00			
Remaining Match Requirement	\$	0.00			
Remaining Available Budget	\$	209,042.00			
Fund Activity Categories					

Budget Overview



Viewing Your Budget

Left Menu > Grant Management > Grants > [Name]

Top Menu > Post-Award > Financial > Budget

To Do:

- Update Options to show/hide essential details;
- Turn on *Line Items, Actuals, Remaining* (options save upon re-entry)

Budget						
Expense Budget	Grant-Funded Budgeted	Grant-Funded Actuals	Total Budgeted	Total Actuals	Grant-Funded Remaining	Total Remaining
Admin Fee						
Admin \$	\$1,000.00	\$0.00	\$1,000.00	\$0.00	\$1,000.00	\$1,000.00
Subtotal	\$1,000.00	\$0.00	\$1,000.00	\$0.00	\$1,000.00	\$1,000.00
Facilitator Fee						
Chronic Disease \$	\$2,000.00	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$2,000.00
Nutritional Healthy Eating \$	\$2,500.00	\$0.00	\$2,500.00	\$0.00	\$2,500.00	\$2,500.00
Physical Fitness \$	\$3,000.00	\$0.00	\$3,000.00	\$0.00	\$3,000.00	\$3,000.00
Subtotal	\$7,500.00	\$0.00	\$7,500.00	\$0.00	\$7,500.00	\$7,500.00
Food						
Nutritional Supplies (Ingredients) \$	\$3,000.00	\$0.00	\$3,000.00	\$0.00	\$3,000.00	\$3,000.00
Subtotal	\$3,000.00	\$0.00	\$3,000.00	\$0.00	\$3,000.00	\$3,000.00
Program Equipment						
Printing, Paper, Ink, Certificates \$	\$400.00	\$0.00	\$400.00	\$0.00	\$400.00	\$400.00
Subtotal	\$400.00	\$0.00	\$400.00	\$0.00	\$400.00	\$400.00
Program Supplies						
Cooling towels \$	\$200.00	\$0.00	\$200.00	\$0.00	\$200.00	\$200.00
Jump ropes \$	\$210.00	\$0.00	\$210.00	\$0.00	\$210.00	\$210.00
Subtotal	\$410.00	\$0.00	\$410.00	\$0.00	\$410.00	\$410.00
Total Expense Budget Cost	\$12,310.00	\$0.00	\$12,310.00	\$0.00	\$12,310.00	\$12,310.00

Tracking Expenses

- From the Payment Request Screen:
- Under Financial Detail: Click the **Create New Expense +** to create a new expense entry
 - Identify:
 - Category*
 - Line Item*
 - Direct Cost*
 - Expense Date*
 - > Expense date MUST reflect the date range for which you will submit your reporting period and reimbursement request
 - Expense Status**
 - Description
 - Attachment (upload source docs)*
- *Required Field(s)
- **Expenses must be marked as Reviewed to be eligible for Payment Request

General	Financials
Grant	Oak Park Test Recipient - Award
Category	Equipment
Line Item	Event Rentals
<input type="button" value="Clear all filters"/>	
Item Type	Non-Personnel Line Item
Direct Cost *	\$10.00
	<input type="checkbox"/> Exclude From Match
Assignee(s)	
Created By	whitney.r.sikora@gmail.com
Expense Date *	1/10/2025
Expense Status	Reviewed
Payment Status	New

Modifying/Deleting an Expense

- From the Expense Screen:
- Run Expense report using appropriate filter(s) to view the line item(s) required modification**
 - Next to the line item, click the Pencil Icon to open up the expense in Edit Mode
 - Make all required modification(s) and click **Save**
- To Delete an expense:
 - After running the expense report click on the check box next to the appropriate line item(s)
 - Under the **Actions** click the Trash icon to delete the selected item(s)

All Expenses			
Actions			
+ ✓ 🗑️			
Drag a column header and drop it here to group by that column			
<input type="checkbox"/> Select All	Expense Date	Description	
<input type="checkbox"/>	11/1/2024	Expense	
<input type="checkbox"/>	11/11/2024	Expense	
<input type="checkbox"/>	11/20/2024	Expense	
<input type="checkbox"/>	11/30/2024	Expense	
<input type="checkbox"/>	11/30/2024	Expense	

Viewing Your Expenses

- *Left Menu > Grant Management > Grants > [Name]*
- *Top Menu > Post-Award > Financial > Expenses*
- To Do:
 - ❑ Filter expense Report by selecting Category, Line Item, and/or Time Frame
 - ❑ If not selecting filter(s), clicking Run will display all historical expenses

Filter By

Grant

Category

Line Item

[Clear all filters](#)

Time Frame [Run](#)

All Expenses

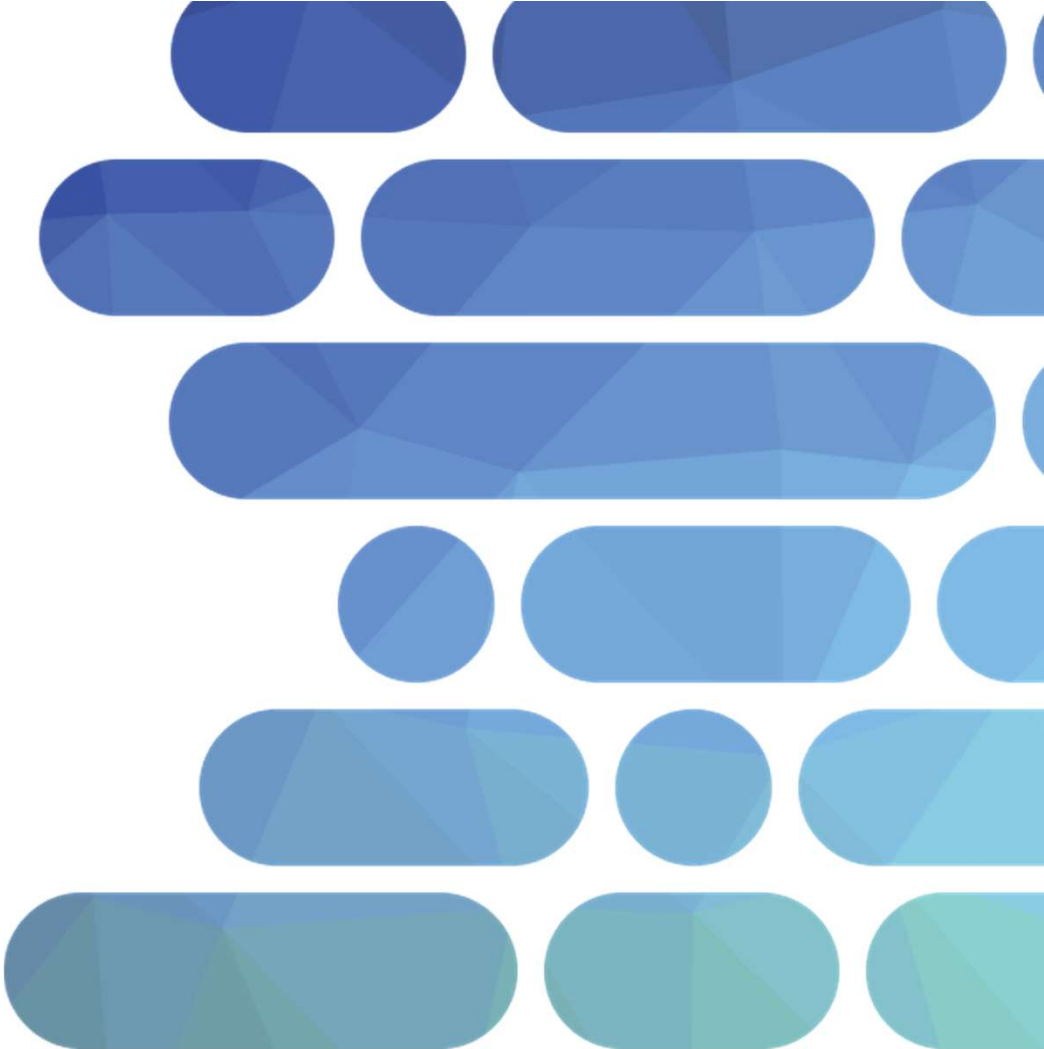
Actions

[+](#) [v](#) [i](#)

Drag a column header and drop it here to group by that column

<input type="checkbox"/> Select All	Expen...	Descri...	Paym...	Expen...	Paym...	Origin	GL Ac...	Line It...	Respo...	Creat...	Payee	Cash ...	In Kind	Other ...	Amount
<input type="checkbox"/>	11/1/2024	Expense	Payment Request #1	Reviewed	New	Manual		Printing, Paper, Ink, Certificates	Recipient User	Recipient User		\$0.00	\$0.00	\$0.00	\$200.00
<input type="checkbox"/>	11/11/2024	Expense	Payment Request #1	Reviewed	New	Manual		Nutritional Supplies (Ingredients)	Recipient User	Recipient User		\$0.00	\$0.00	\$0.00	\$100.00
<input type="checkbox"/>	11/20/2024	Expense	Payment Request #1	Reviewed	New	Manual		Physical Fitness	Recipient User	Recipient User		\$0.00	\$0.00	\$0.00	\$250.00
<input type="checkbox"/>	11/30/2024	Expense	Payment Request #1	Reviewed	New	Manual		Admin	Recipient User	Recipient User		\$0.00	\$0.00	\$0.00	\$125.00
<input type="checkbox"/>	11/30/2024	Expense	Payment Request #1	Reviewed	New	Manual		Admin	Recipient User	Recipient User		\$0.00	\$0.00	\$0.00	\$255.00

Final Report Narrative



In-System Structure

- Strategies
 - Goals
 - Achievements

Name	Goal Type	Assignee(s)	Strategy
Project Activities	Narrative		Final Report Narrative
Allocated Funds	Narrative		Final Report Narrative

All Final Report Narrative goals are outlined. To access, click on:

Post-Award > Performance > Performance Plan

From here, you will be able to click the trophy icon next to any one of the goals and track an achievement toward your goal. You will NOT have to wait until the final report is due to complete this – you are able to track as you go.

Click on the goal > Plus Sign in the Upper Right Corner
Enter any relevant information and click **Save**



Grant Training Recipient Organization - Award

Strategy Final Report Narrative

Goal Type Narrative

Goal Project Activities

Description

Assignee Whitney Sikora

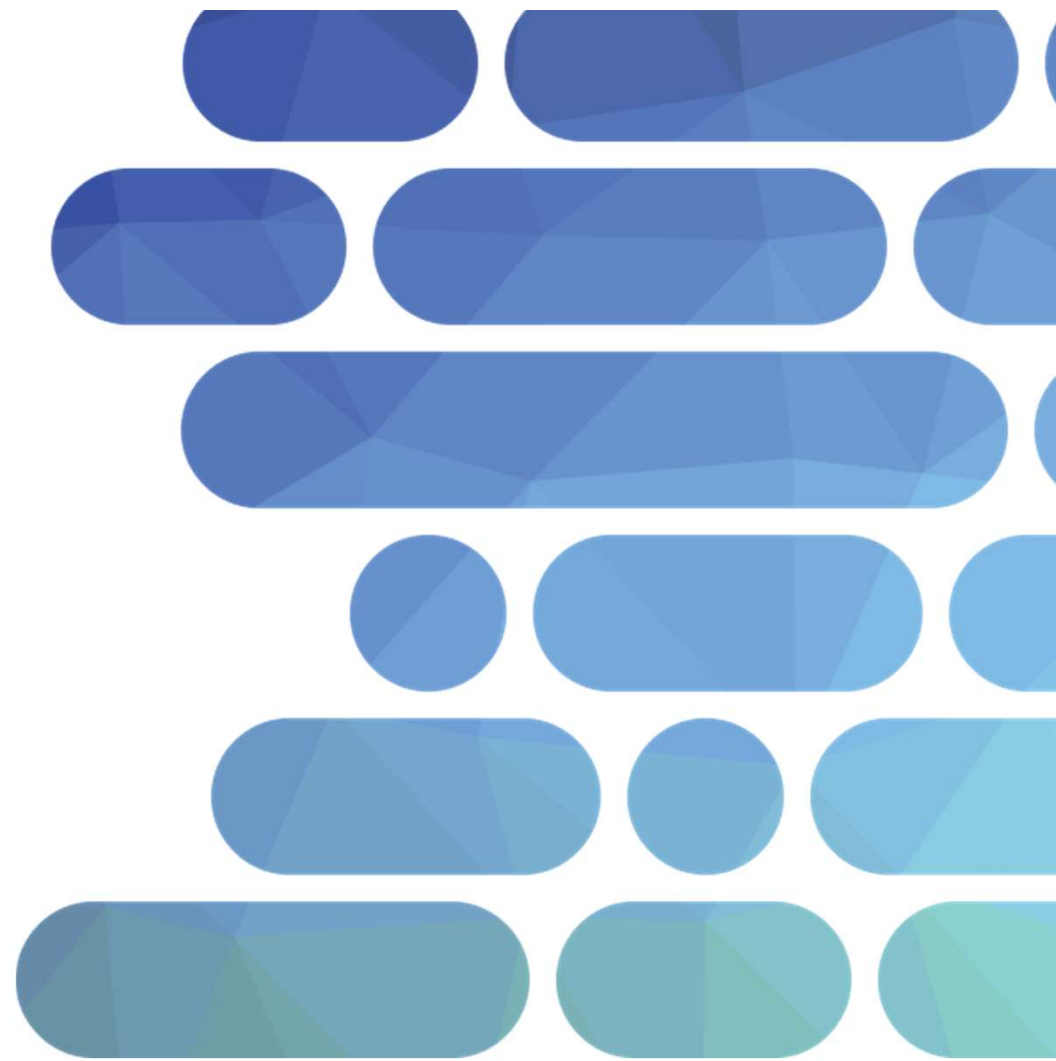
Achievement Date 7/18/2025

Question Describe project activities in detail noting anything that was different than in the original proposal.

Answer*

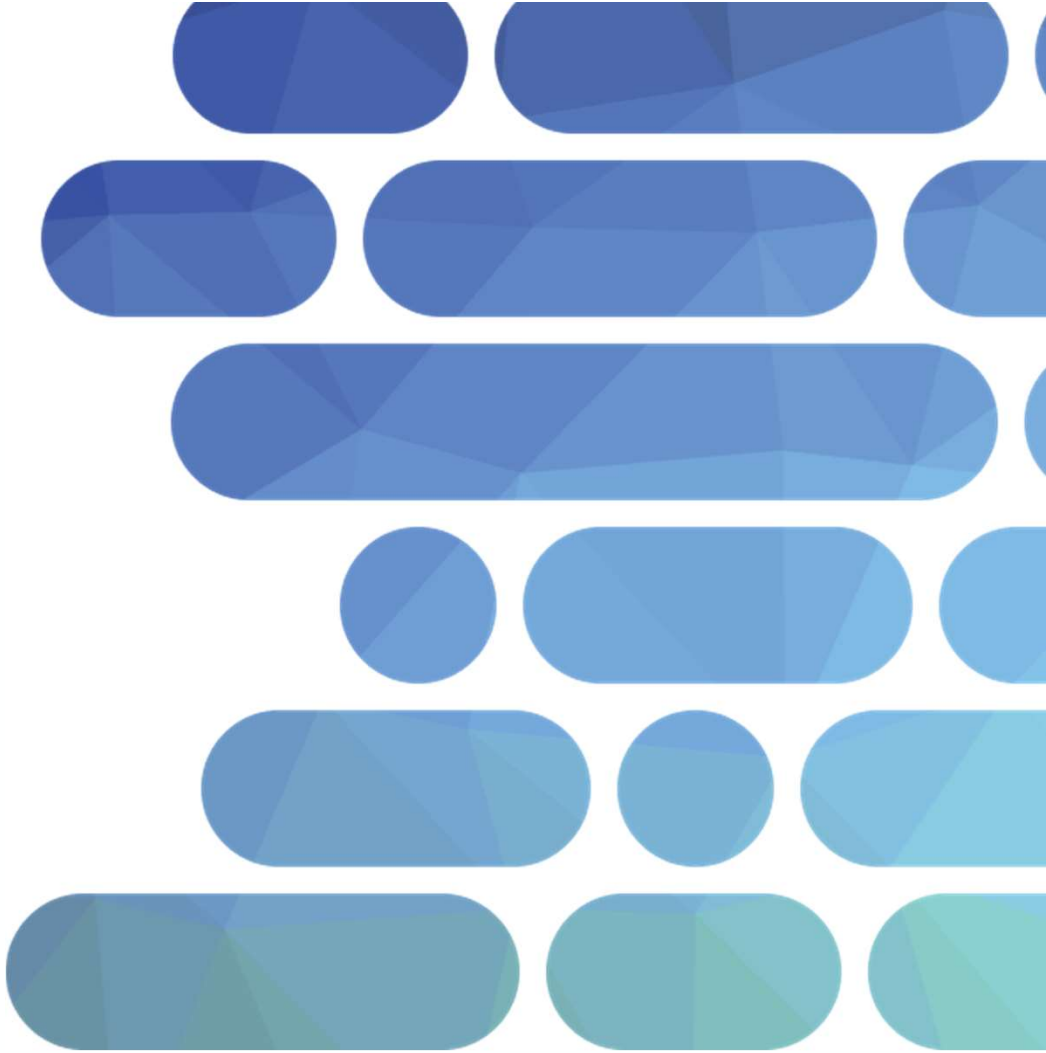
Complete

Save Cancel



In-System Demo

Help and Support



Resource Center

- Bottom-left corner
- Guides and Walkthroughs

AmpliFund ID DEQ Test Recipient

Past Due Complete Due Grant: All

August 2023 Events and Tasks: today

Sun	Mon	Tue	Wed	Thu	Fri
30	31	1	2	3	
6	7	8	9	10	

Customer Support

Visit the support portal

<https://amplifund.zendesk.com>

Submit a support ticket

support@amplifund.zendesk.com or in product

Call the help desk

(216)377-5500 ext. 2

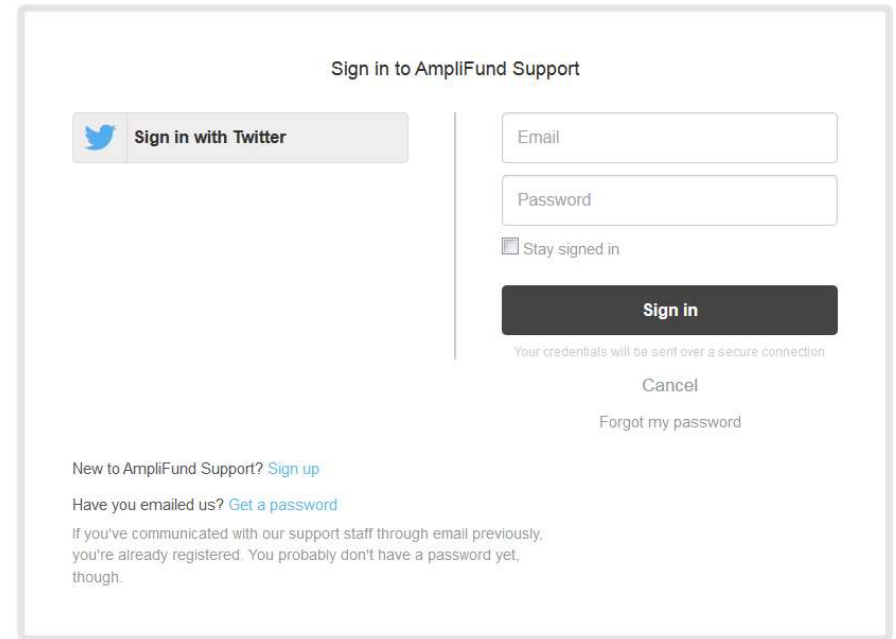
Customer Support Hours

8:00am – 8:00pm ET, Monday through Friday, excluding holidays




AmpliFund Support Site

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



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

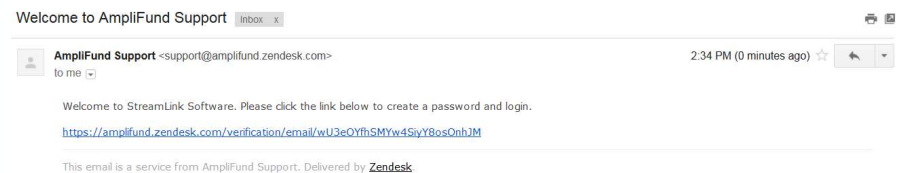
Cancel

[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.



Support Site Resources



 Release Notes Weekly announcement of enhancements, updates, and fixes in AmpliFund	 User Guides AmpliFund User Guides and Quickstart Guides for download	 Instructions Step-by-step instructions on using AmpliFund's features
 Upcoming Training and Videos Live training events and videos on how to use AmpliFund	 Import Templates Excel templates for importing data into AmpliFund	 FAQs Frequently Asked Questions about using AmpliFund
 Submit a Ticket Still need help? Submit a request to our help desk.		

References

- Account
 - [How to Change your Password](#)
 - [How to Edit account Details](#)
 - [How to Add a New User](#)
 - [How to Edit a User](#)

- Navigation
 - [Navigation Video](#)
 - [Navigation Guide](#)

- Grant
 - [How to Edit a Grant](#)

- Reports
 - [Report user guides](#)

- Expenses
 - [How to Add Expenses](#)