SRBC GRANT RECIPIENT USER GUIDE

Contents

Section 1: Navigation and Overview

The Left Navigation Menu:

- **Purpose:** Allows you to navigate throughout the system to perform different tasks.

Icon Tool Bar (Top Right Corner):

- **Purpose:** Allows the user to choose which action they would like to take on a certain page in AmpliFund. This tool bar will change throughout AmpliFund as each page has different actions available.

Calendar:

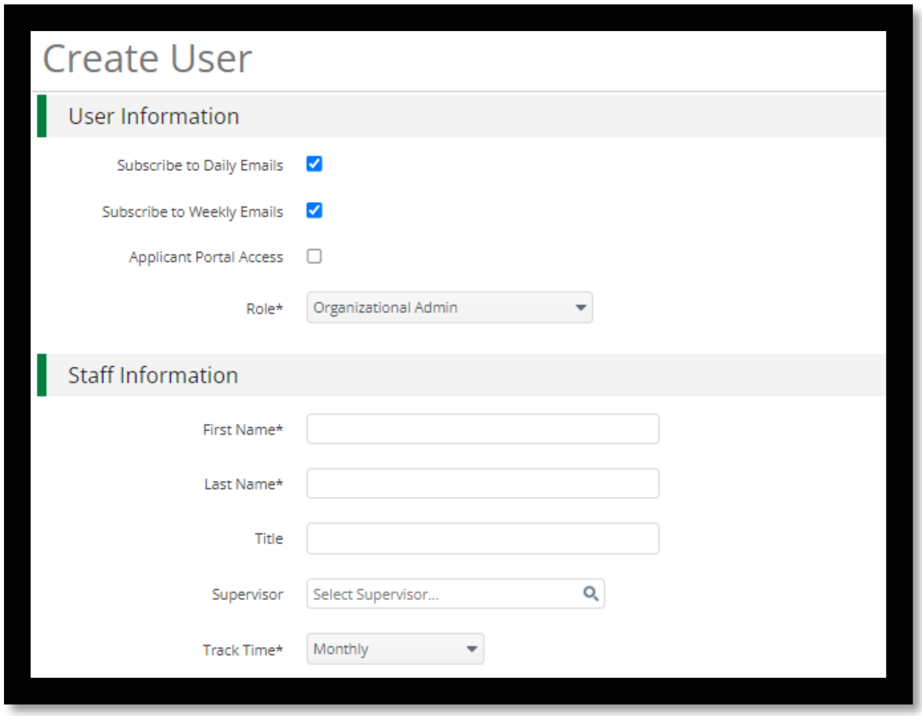
- **Purpose:** Creates a visual of timelines, tasks, and deadlines assigned to and created by a user. Budget and Performance Reporting dates will be populated here for you to monitor. **Completing a Task:** Click on the calendar task entry and mark it as complete once you have performed the task. This will send an email to SRBC that you have completed the task by its due date.

Section 2: How to Add a User

Adding a User:

- **Purpose:** Allows those involved in the Grants Management process access to AmpliFund.
- **Navigation:** Administration > System Security >Users > Plus Sign
- **Creating and Inviting a User Details:**
    - After clicking the plus sign, there will be a pop up box prompting for new user information to be entered (see subsequent page for a preview).
    - Decide what user role you would like the new user to have and add in other required information as noted by an *.
        - For example, many recipients will assign Organizational Admin roles to those who will need to view and edit in the system. Additionally, recipients will likely assign Executive roles to those who they intend on just viewing the system.
        - More information on user roles can be found here: https://amplifund.zendesk.com/hc/en-us/articles/214530003-Security-Roles-Matrix
    - Click ***Create.***

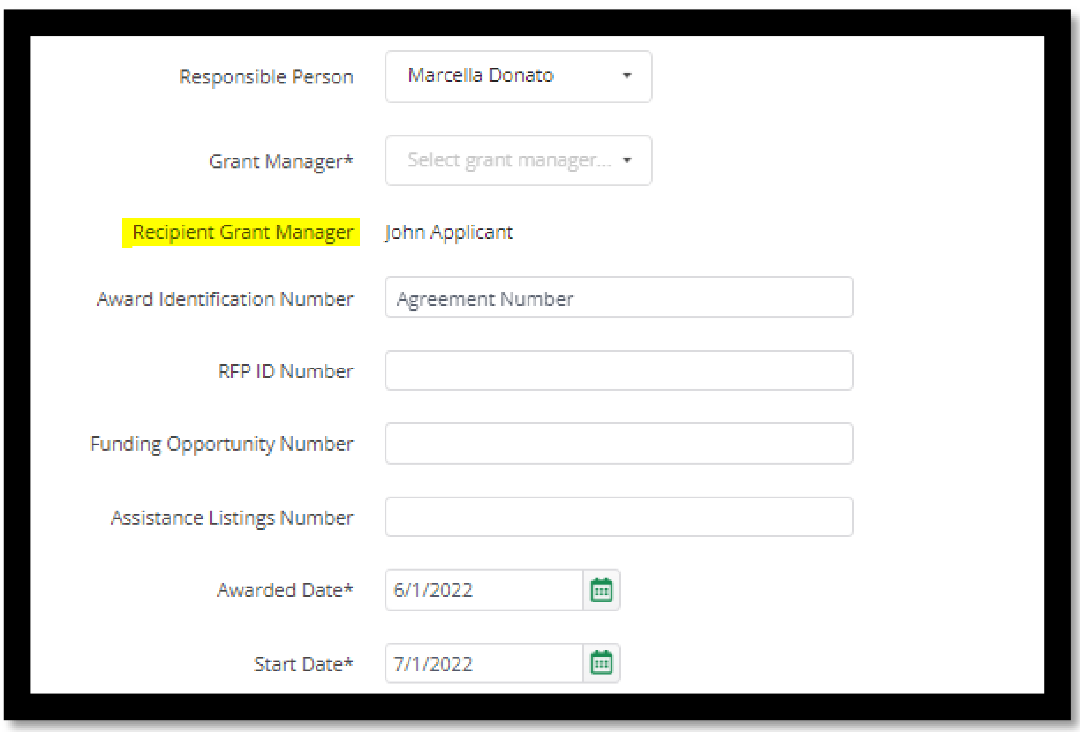
- Next, click on the ***envelope icon*** in the top right corner. The system will send an automated login email and instructions to the new user.



Section 3: How to Add a Grant Manager

Adding a Grant Manager to Your Grant:

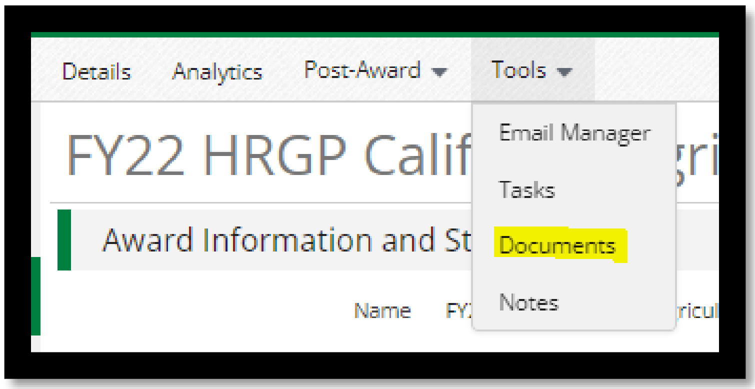
- **Purpose:** By adding a Grant Manager to a grant, the assigned Grant Manager will be updated with system-generated notifications regarding the grant, its requirements, and its deadlines.
- **Navigation:** Grants Management > Grants > Click on the Grant Name > Pencil Icon
- **Adding a Grant Manager Details:**
    - Scroll to the ***Recipient Grant Manager*** field and input the user or pre-populated staff member that is to be the grant manager. Click ***Save*** button.
    - **Please Note:** For a person to be the Grant Manager, they must have already been entered into the system as a ***User***. The Grant Manager field only pulls names from the User List in AmpliFund.



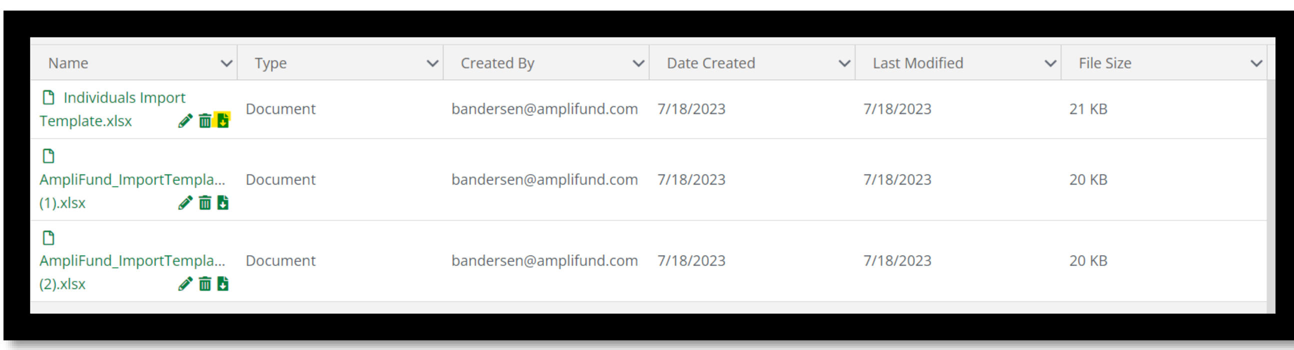
Section 4: How to Review, Download, and Upload Documents

Reviewing SRBC Documents:

- **Purpose**: AmpliFund allows recipients to review shared documents uploaded by SRBC.
- **Navigation (To View a Document)**: Grant Management > Grants > Grant Name > Tools > Documents > Public Folder > Document Name



  - **Navigation (To Download a Document)**: Once in the Public Document Folder, click the download button next to the document name (see highlighted icon below).



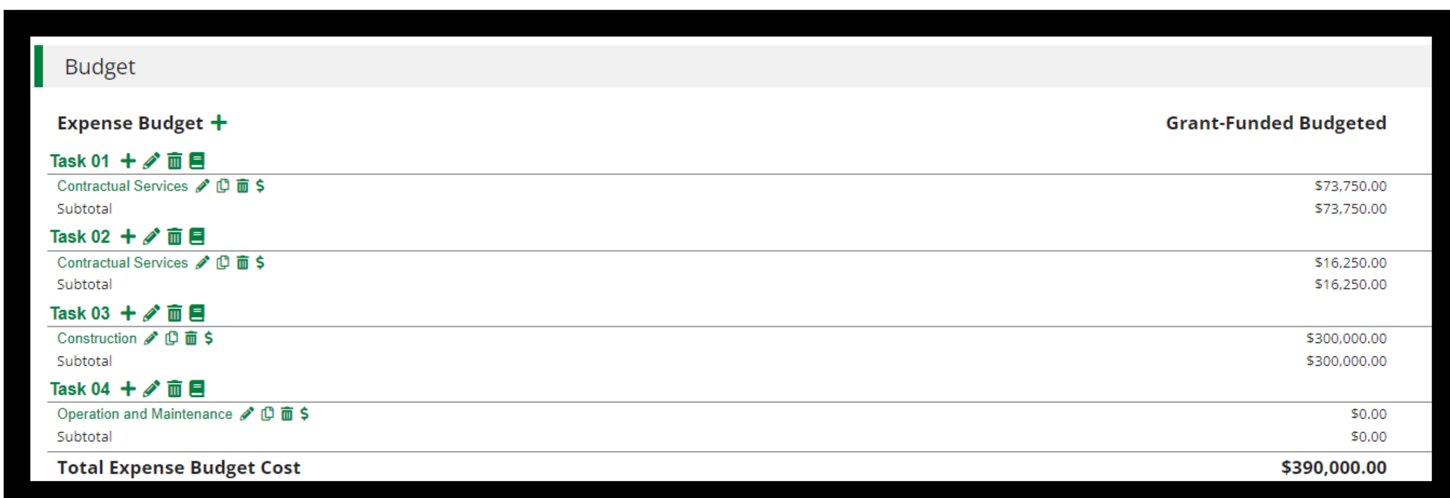
Name	Type	Created By	Date Created	Last Modified	File Size
Individuals Import Template.xlsx	Document	bandersen@amplifund.com	7/18/2023	7/18/2023	21 KB
AmpliFund_ImportTempla... (1).xlsx	Document	bandersen@amplifund.com	7/18/2023	7/18/2023	20 KB
AmpliFund_ImportTempla... (2).xlsx	Document	bandersen@amplifund.com	7/18/2023	7/18/2023	20 KB

  - **Navigation (To Upload a Document):** Once in the Public Folder > Upload Documents Folder > Click the Upload button in the top right corner (see highlighted icon below).
    - **Note:** This action will automatically share the uploaded document with SRBC for their review and records.

<u>Section 5: How to View the Budget</u>

Viewing Your Budget:

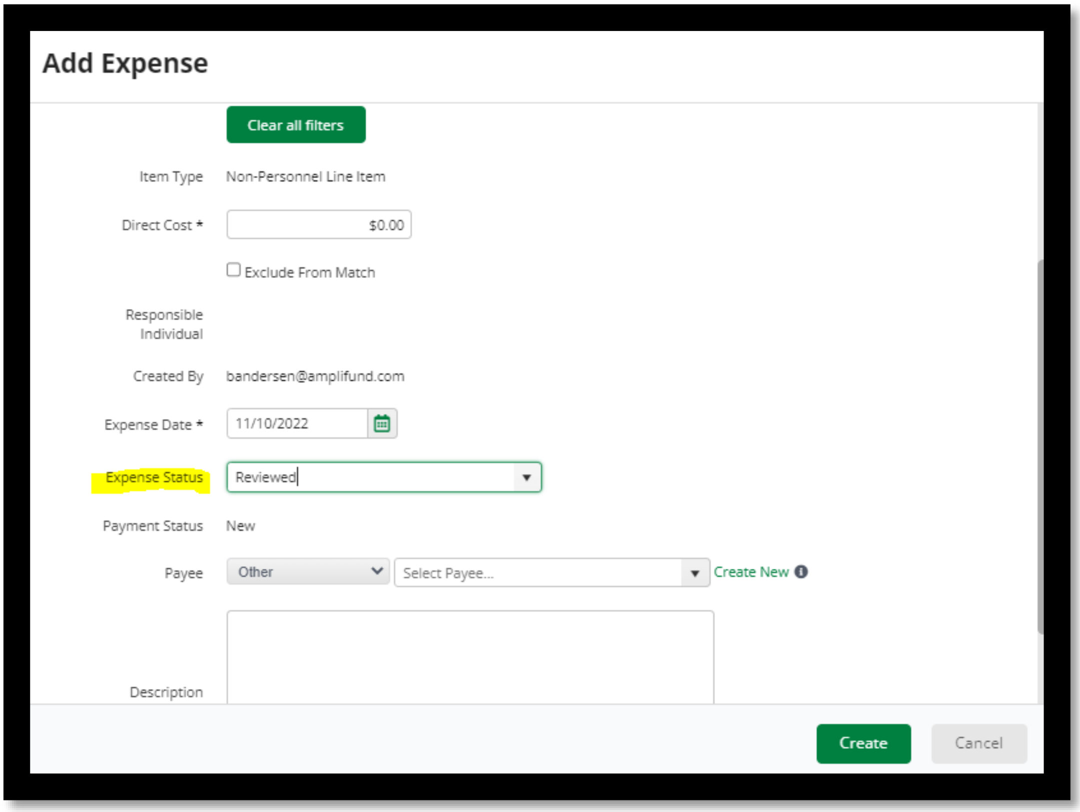
- **Purpose**: Viewing a budget will give the opportunity to review budget categories and line items as you track and report your expenses.
- **Navigation**: Grant Management > Grants > Click on the Grant Name > Post-Award Tab > Financial > Budget
- **Viewing your Budget Details:**
    - **Please Note:** If you would like to view budget line items, grant years, and match columns, then check the boxes next to the appropriate item. These checkboxes can be located just below the heading titled ***Options***.
    - **Please Note:** The budget for each task has been set by SRBC to be equal to those within your grant agreement. The SRBC has also set budget line items based on your original grant application. Therefore, you will not be able to edit line items and categories on your budget.
    - **Please Note:** Once expenses are entered (next section) you will be able to enable "actuals" on your budget to compare actual expenses vs. budgeted line items.



Section 6: How to Add an Expense

Adding an Expense:

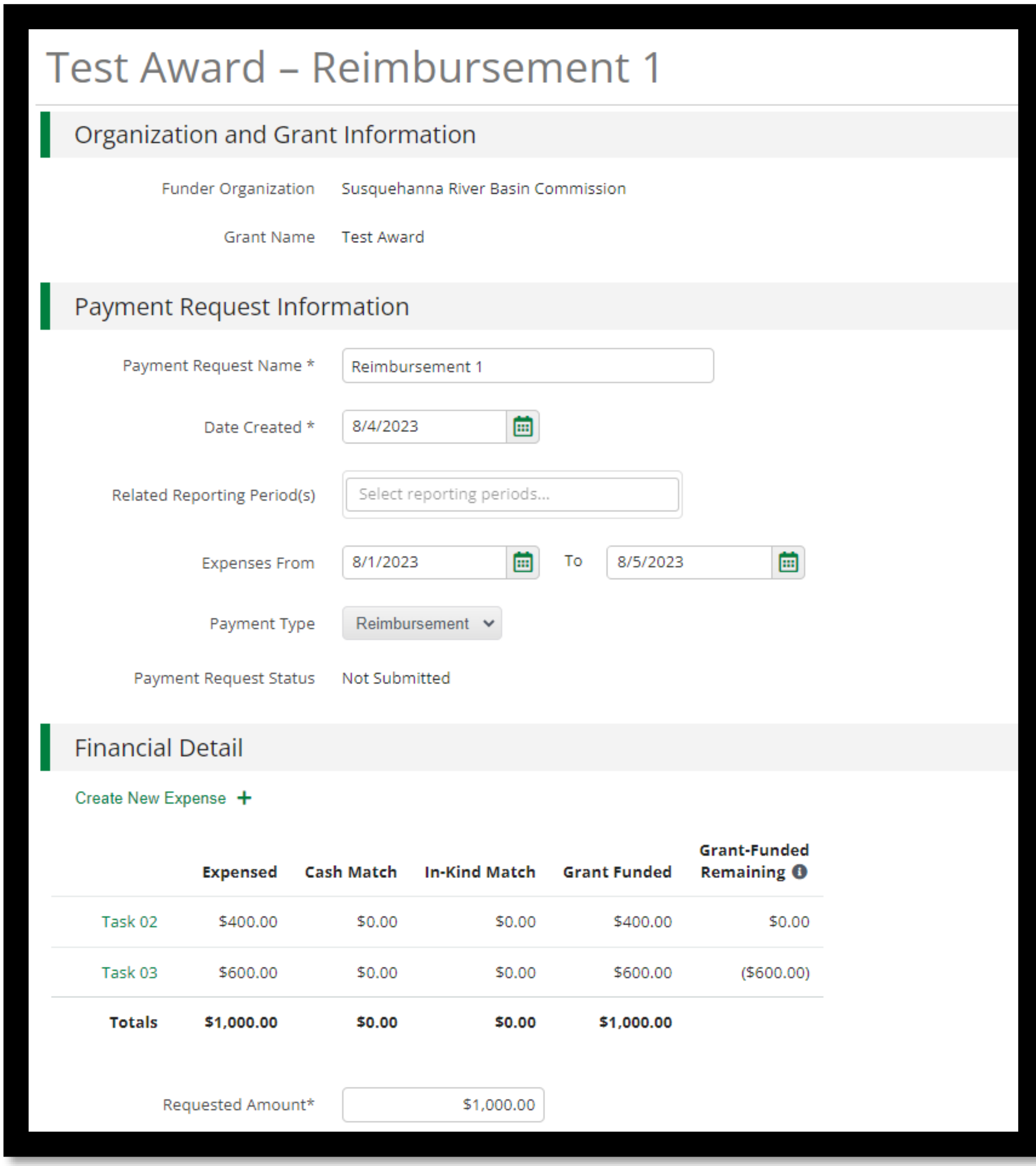
- **Purpose:** By adding an expense to AmpliFund, both you and SRBC can track actual expenditures against budgeted items.
- **Navigation:** Grants Management > Grants > Click on the Grant Name > Post-Award Tab > Financial > Expenses
- **Reviewing and Adding Expense Details:**
    - To see expenses that have already been entered into the system, click ***Run.***
    - To add a new expense, click the '***+' sign*** under the title ***Actions.***
    - Select the Budget Category that the new expense will fall under. Then, select the line item that the expense is related to. Set the ***Expense Status*** to ***Reviewed*** (see subsequent page for preview)***.*** SRBC requires that you provide a brief description of the expense in the ***Description*** field.
    - Additionally, SRBC requires that you populate the ***Payee*** field. To add in the ***Payee,*** select **Create New**, and type in the name of the ***Payee.***
    - To document Cash Match or In-Kind Match contribution to an expense, click on the ***Financials*** tab. Then click on the dollar sign next to Cash Match or In-Kind Match and enter in the dollar amount for this expense that is covered by either.
    - Finally, it is necessary to add a copy of the receipt or invoice associated with the expense in the ***Attachments*** tab. Click the Attachments icon to upload the receipt or invoice and then click Save.
    - To create the expense, click on ***Create.***


Add Expense
Clear all filters
Item Type
Non-Personnel Line Item
Direct Cost *
$0.00
Exclude From Match
Responsible Individual
Created By
bandersen@amplifund.com
Expense Date *
11/10/2022
Expense Status
Reviewed
Payment Status
New
Payee
Other
Select Payee...
Create New
Description
Create
Cancel

Section 7: How to Create a Payment Request

Creating a Payment Request:

- **Purpose:** By creating a payment request, you will be able to compile all 'Reviewed' expenses for the period and submit them to SRBC for approval.
- **Navigation:** Grant Management > Grants > Grant Name > Post-Award > Cashflow > Payment Requests
- **Creating a Payment Request:**
  - To create a new payment request, click on the plus sign in the top right corner of the screen.
  - Enter in the name of this request using the following naming convention: ***Type of Request*** (i.e., Advance or Reimbursement) immediately followed by the ***Request Number*** (see subsequent page for preview)***.*** For example, if you are submitting your very first payment request for reimbursement, then you should name it "Reimbursement 1". If it is your first advance request, then you should name it "Advance 1". Subsequent requests should then use 2, 3, and so on.
  - Then add the date and any additional information that applies in the Payment Request Information section.
    - To pull in the expense(s) you created, populate the ***Expenses From and To*** fields with the date or date range of the expense(s) you are looking to submit.
    - Once you have done this, the expense(s) you created should automatically populate in the ***Financial Details Section.***
    - Add in the total amount you are looking to get approved in the ***Requested Amount*** field.
  - Click ***Create/Save*** or if you are ready to submit, click ***Submit.***
    - If you click ***Create/Save***, you will be able to come back to the payment request later to review and make edits before submitting.
    - If you click ***Submit***, then SRBC will be notified that your Payment Request is ready for review, and you will not be able to make any further edits.



Test Award – Reimbursement 1

Organization and Grant Information

Funder Organization: Susquehanna River Basin Commission

Grant Name: Test Award

Payment Request Information

Payment Request Name *: Reimbursement 1

Date Created *: 8/4/2023

Related Reporting Period(s): Select reporting periods...

Expenses From: 8/1/2023 To 8/5/2023

Payment Type: Reimbursement

Payment Request Status: Not Submitted

Financial Detail

Create New Expense +

	Expensed	Cash Match	In-Kind Match	Grant Funded	Grant-Funded Remaining
Task 02	$400.00	$0.00	$0.00	$400.00	$0.00
Task 03	$600.00	$0.00	$0.00	$600.00	($600.00)
Totals	**$1,000.00**	**$0.00**	**$0.00**	**$1,000.00**	

Requested Amount*: $1,000.00

Section 8: How to Submit a Payment Request If You *Saved* in the Previous Step

Submitting a Payment Request:

- **Purpose:** By submitting a payment request, SRBC will be notified of the expenditures in which you request reimbursement.
- **Navigation:** Click the pencil icon next to a payment request > Verify all information is correct > Click ***Submit***
- **Submitting a Payment Request Details:**
  - **Please Note:** When the Submit button is clicked, you will not be able to edit the payment request, unless SRBC sends it back for revisions. Thus, ensure your organization uses the Create/Save button until all information is entered and authorized.

Section 9: Performance Reporting

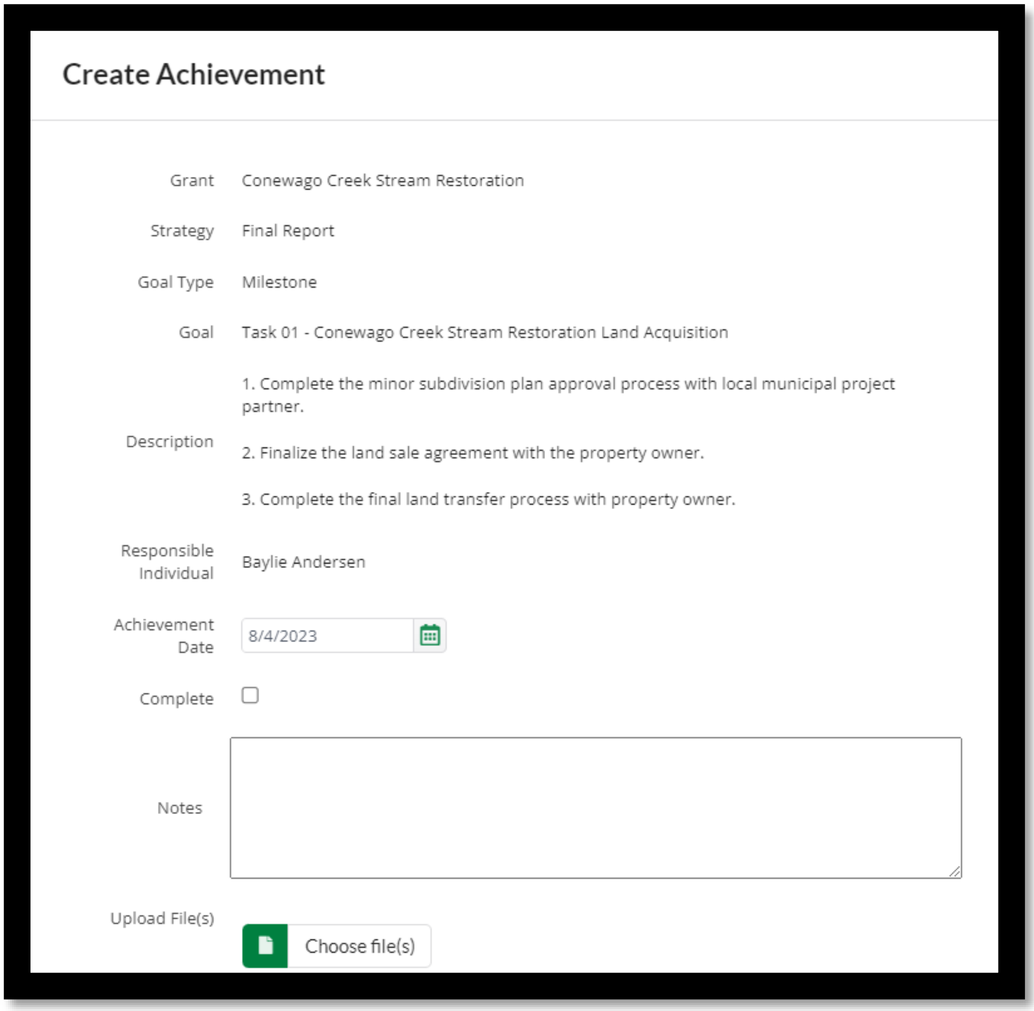
Adding an Achievement:

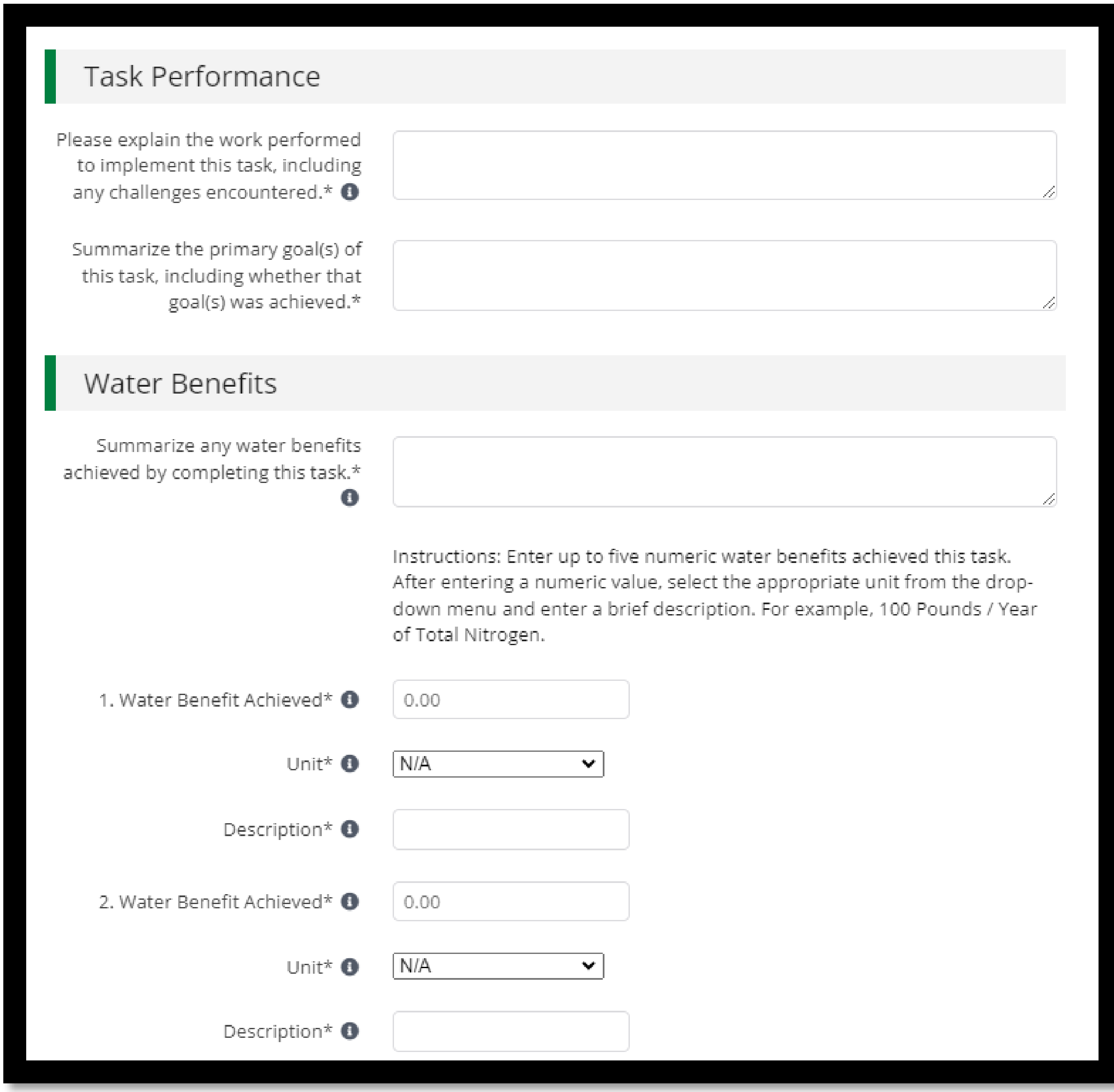
- **Purpose:** To report and track your programmatic progress, you will add achievements to goals that have been prepared for you. This will give visibility into performance progress and developments for yourself and SRBC.
- **Navigation:** Activity > Achievements > Goal you wish to report on > + > Fill in achievement information > click ***Create*** (see subsequent pages for preview).
  - First, read over the description of the task to better understand what is expected by SRBC. Then enter the date of the achievement. If all of the elements in the description have been met, click the ***Complete*** button.
  - Second, scroll down to the Task Performance section and complete the required questions with the appropriate level of detail, if applicable.
  - Next, scroll down to the Water Benefits section. Add up to 5 numeric water benefits achieved through this task. Enter in the number value, then select the unit and provide a brief description.
    - Example: 100 Pounds/Year of Total Nitrogen Reduction

    If the requested information in the Water Benefits section is not applicable to the specific task, then enter either "N/A" or "0".
  - Then, complete the Other Benefits section. Enter "N/A" if you did not achieve any non-water benefits by the end of the task.
  - Finally, please feel free to provide SRBC with any feedback regarding the Consumptive Use Mitigation Grant Program.

- Click ***Create*** when finished.

- **Please Note:** You can view past achievements by clicking on the trophy icon next to the goal name.





Task Performance

Please explain the work performed to implement this task, including any challenges encountered.*

Summarize the primary goal(s) of this task, including whether that goal(s) was achieved.*

Water Benefits

Summarize any water benefits achieved by completing this task.*

Instructions: Enter up to five numeric water benefits achieved this task. After entering a numeric value, select the appropriate unit from the drop-down menu and enter a brief description. For example, 100 Pounds / Year of Total Nitrogen.

1. Water Benefit Achieved* 0.00

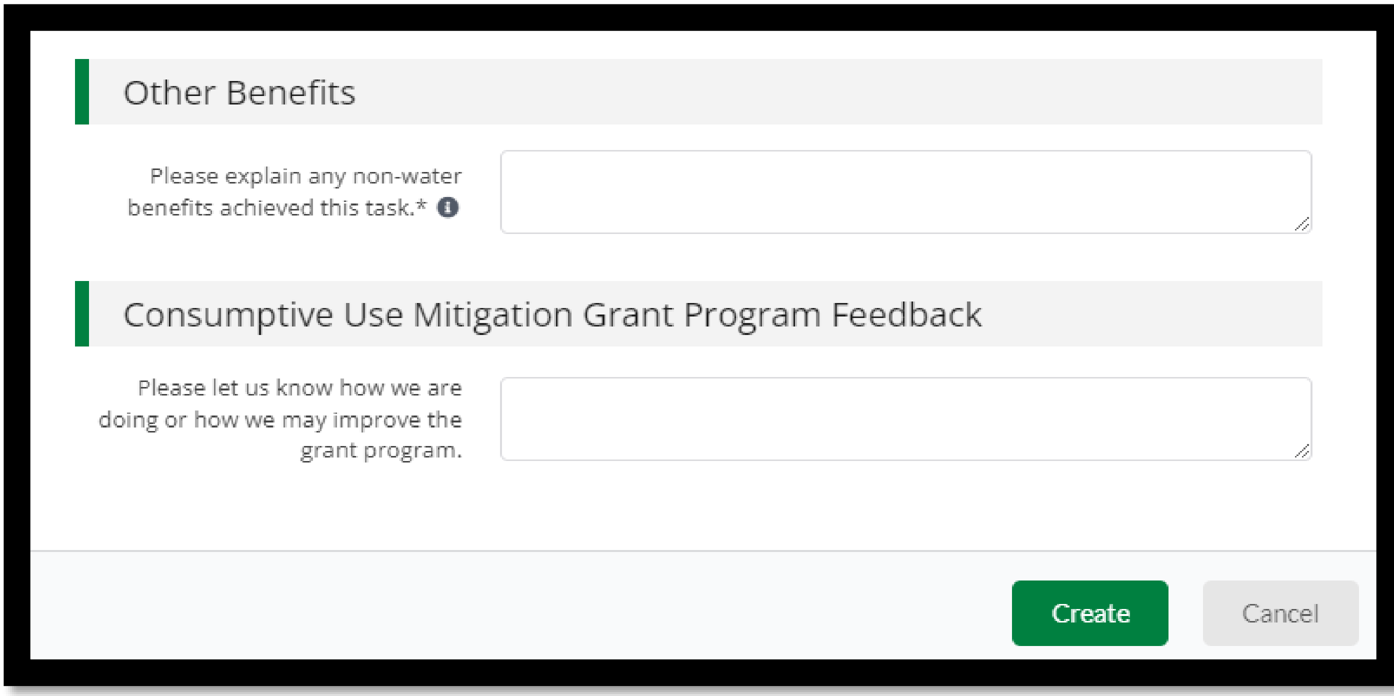
Unit* N/A

Description*

2. Water Benefit Achieved* 0.00

Unit* N/A

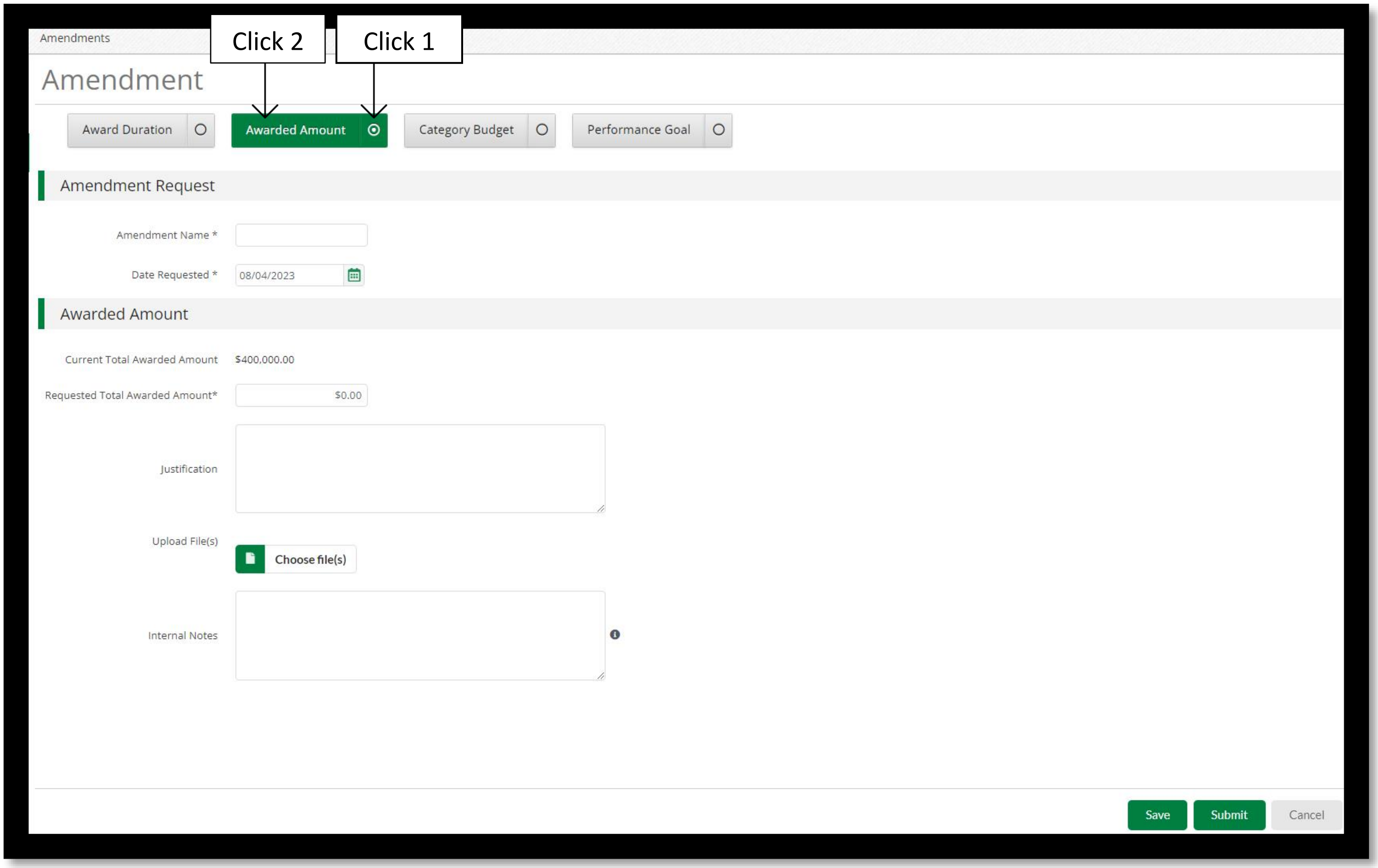
Description*



Section 10: Requesting an Amendment

Creating and Submitting an Amendment

- **Purpose:** If there is ever a need to request a change to your award duration, awarded amount, category budget, or performance goals, you can submit for that change through AmpliFund Amendment Functionality.
- **Navigation:** Grants Management > Grants > Grant Name > Post-Award > Management > Amendments > + > click on the circle next to the name of the type of Amendment you wish to submit > Then click on the name type of the amendment type itself > Fill in required information > Click ***Save*** to access later > or click ***Submit*** to send the amendment to SRBC.


Amendments
Click 2
Click 1
Amendment
Award Duration
Awarded Amount
Category Budget
Performance Goal
Amendment Request
Amendment Name *
Date Requested *
08/04/2023
Awarded Amount
Current Total Awarded Amount
$400,000.00
Requested Total Awarded Amount*
$0.00
Justification
Upload File(s)
Choose file(s)
Internal Notes
Save
Submit
Cancel