Emergency Management Performance Grant (EMPG)

AmpliFund Step-by-Step Guide
for Sub-Recipients

Last updated December 2021

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How to View and Edit your Grant

View your Grant and add a Grant Manager by completing the following steps:

1. Navigate to **Grant Management > Grants** and then **click on the name of your Grant**
2. Click on the **'pencil' icon** in the icon toolbar to edit the Grant Details page

3. Upon clicking **Edit**, you will be able to edit the Grant Name and add a Recipient Grant Manager
4. Click the dropdown menu in the Recipient Grant Manager field to add a Sub-Recipient Grant Manager to the record.
   a. The Recipient Grant Manager will receive all automatic notifications regarding Approvals and Rejections communicated from DES
   b. *Note: The User must be created in AmpliFund in order for you to select them from the dropdown list.*
5. To save changes, click **Save**

How to Add Users in AmpliFund

Once you have accessed your AmpliFund account, you will be able to add additional Users to view and manage your Grant. To add Users, complete the following steps:

1. Navigate to **Administration > System Security > Users**
2. Click the **'+' icon** in the top right-hand corner
3. Complete the *User Information section*
   a. **Subscribe to Daily Emails:** This option allows Users to receive notification, reminder, and update emails on the date they are scheduled
   b. **Subscribe to Weekly Emails:** This option allows the User to receive all notifications, reminders, and updates once a week in their inbox
   c. **Applicant Portal Access**: Check this box if the User should have access to the Applicant Portal to view the application submitted, and apply for future DES opportunities
   d. **Role:** Organizational Admin is the recommended role, and allows users to view, edit, create all awards in your account
4. Complete the *Staff Information* section
   a. **First Name, Last Name,** and **Email Address** are all required to create a User
5. Click the **Create** button to create the User
6. Complete steps on "How to Invite Users into AmpliFund" found on the next page

How To Invite Users into AmpliFund

Once Users are created, there are two ways to invite them into the system:

1. Upon creating the User, you will be able to click the 'envelope' icon in the top right-hand corner to invite that User into the system

2. Navigate to **Administration > System Security > Users** to access the list of Users and click the envelope icon next the name of the User you want to invite in

Note: Upon creating a user, they will receive an email invitation from AmpliFund and will be prompted to click on a link to establish their own unique password

How To Mark a Task Complete

Tasks can be system-generated or user-created. Once a task has been assigned, the assignee(s) will receive up to three email reminders based on the task settings. Once a task is completed, no further email reminders will be sent. If a task is not completed by its due date, daily email reminders will be sent to the assignee until the task is completed.

1. Open **Activity > Tasks**.

3. In the confirmation pop-up window, click **Mark as Complete**

OR

4. Open **Activity > Calendar**.
5. Click on a **task**.
6. In the pop-up window, click **Mark as Complete** expenses

How to Submit a Performance/Status Report

1. Open **Grant Management tab > Grants > Select the Corresponding EMPG Grant**
2. Open **Custom>Performance Report Form (EMPG 2021)**
3. Click on the **+ icon (Create)** at the top of the page
4. Fill out all required fields accordingly to reflect your Grant, the quarter, district, and jurisdiction information.
5. Fill out all the sections in the report to reflect activities completed in the quarter.
6. Once finished click **Create** at the bottom.
   a. Note: **Only hit the Create button once!** It will seem as though nothing happens after you hit Create but the system will accept your submittal. If you hit Create multiple times it will create a performance report for each time you hit Create. Let's say you hit Create 3 times, the system will create 3 reports for that corresponding quarter. If this happens the sub-recipient will need to delete any extra reports that were created.
7. After hitting **Create** you have successfully submitted your performance/status report for the corresponding quarter. MT DES will conduct their review and reach out should additional information be needed.

How to Submit a Quarterly Claim

Sub-recipients **MUST Complete all Four Steps** when submitting a claim to MT DES.

1. Create Expenses
2. Create a Reporting Period
3. Close the Reporting Period
4. Create and Submit a Payment Request

How To Create an Expense

Creating an Expense:

1. Select one of the three ways noted below to access the page necessary for Expense creation:
   a. **Activity > Expenses**
   b. **Grant Management > Grants > Click on the Grant Name > Post-Award > Financial > Expenses**
   c. **Grant Management > Grants > Click on the Grant Name > Post-Award > Financial > Budget >** click the **$** icon next to a line item
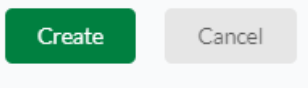2. From the **Expense** page, click the **+** to add an expense

Actions

3. The expense window will appear where you can add an expense record
4. Choose a **budget Category** from the dropdown menu
5. Select a **Line Item** from the dropdown menu
6. Enter the total amount for the Expense in the **Direct Cost field**
7. Select a Date for the Expense in the **Expense Date** field
   a. Note: This should be the date the expense occurred. NOT the date you are entering the expense.
8. Choose **Reviewed** in the Expense Status dropdown menu
9. Add in any details you would like to record in the Description field.
   a. **Mileage Expense:** Enter Total Milage and Rate per Mile
   b. **Equipment Expense:** Fill in the Equipment Inventory on the Custom Tab
10. Click the **Financial** tab
11. In the Cash Match Amount field type **0.50 Percentage**

12. For EMPG you can skip the Attachments or Custom tabs.
    a. Note: you will upload supporting documentation attachments in a later step.
13. Click **Create** to create the expense

14. Enter in all expenses for that quarter by repeating the above steps.
15. When all expenses are entered complete the steps for "How to Create a Reporting Period" found on the next page

Creating an Expense for Soft Match:

1. From the **Expense** page, click the **+** icon to add an expense

2. The expense window will appear where you can add an expense record
3. Choose a **budget Category** of **Soft Match/In Kind Match** from the dropdown menu
4. Select a **Line Item** of **Soft Match** from the dropdown menu
5. Enter the total amount for the Soft Match Expense in the **Direct Cost field**
6. Select a Date for the Expense in the **Expense Date** field
    a. Note: This should be the date the expense occurred. NOT the date you are entering the expense.
7. Choose **Reviewed** in the Expense Status dropdown menu
8. Add in any details you would like to record in the Description field.
9. Click the **Financial** tab
10. In the **Cash Match Amount** field enter **0.50 Percentage**

11. For EMPG you can skip the Attachments or Custom tabs.
    a. Note: you will upload supporting documentation attachments in a later step.
12. Click **Create** to create the expense

13. When all expenses are entered complete steps for "How to Create a Reporting Period" found on the next page

How to Create a Reporting Period

Once expenses are entered, a Reporting Period needs to be created and submitted utilizing the following steps:

1.   Reporting Periods can be accessed in two ways:
   - a.   Go to **Activity > Reporting Periods > Select Grant Name**

       OR

   - b.   Go to **Grant Management > Grants > Select Grant Name**.
   - c.   Click on **Post-Award tab** on top **> Management > Reporting Periods**

2.   Click the **+** icon in the top right to create a new Reporting Period

3.   Check the **Expenses box**
4.   Select the **Date Range** in the dropdown list to create a Reporting Period
5.   Click **Save** to create the Reporting Period

6.   Complete steps on "Closing a Reporting Period" found on the next page

Close a Reporting Period

Review and Close a Reporting Period by following these steps:

1. On the reporting periods main page, click on the **Reporting Period Start Date** of the reporting periods you are closing.
2. Review the Reporting Period in the Overall Expense Details section
3. The Total Awarded Amount will contain the total amount awarded
4. The Total Expense Amount for Period field will reflect the sum of all Expenses that have been entered as **'Reviewed'**.
5. The number of Expenses that have been entered and not marked as Reviewed will appear in the Number of Unreviewed Expenses field. Please **click on the number** and ensure all expenses that need to be included in the Reporting Period have been marked as Reviewed
6. Enter any **Comments**

Overall Expense Details

Total Awarded Amount	$40,000.00
Total Expense Amount for Period ⓘ	$0.00
Number of Unreviewed Expenses	0

Comments

Attach Documentation — Attach Documentation

📄 Choose a file 🗑

7. If you wish to save progress but not submit to DES click the **Save** button

Cancel   Close   Save

8. If you are ready to submit your Reporting Period to DES, click **Close**
9. Complete steps on "How to Create and Submit a Payment Request" found on the next page

How to Create and Submit a Payment Request

1. Click **Reporting Periods** tab on the top of the screen

   Reporting Periods

2. Click the **Post-Award** dropdown menu and click **Cash Flow > Payment Requests**
3. Click the **+** icon in the top right-hand corner in order to create a Payment Request
4. Complete the **Payment Request Name** following a standard naming convention:
   a. *County/Tribe Name – quarter*
   b. Example: Blaine County - Q1
5. The **Date Created** field should be populated with today's date
6. Under Related Reporting Period(s) select the **corresponding reporting period**
7. In the **Payment Type** dropdown, select **Reimbursement**
8. Under the Financial Detail Section enter in the amount requested in the **Requested Amount** field
9. Enter any comments you want DES to see in the **Comments** field
10. Upload the required supporting documentation which may include the general ledger/finance report, invoices, receipts, and/or mileage log for expenses in the **Upload File(s) field**.
    a. If you are claiming soft match, you must also attach an event agenda, sign in roster, and soft match tracker.
11. If you are not ready to Submit to DES but want to save your changes, click **'Create'**
12. If you are ready to Submit to DES, click **'Submit'**

   Create   Submit   Cancel

13. If you clicked **Submit** you have completed all steps to submitting a payment request (a.k.a. reimbursement claim) to MT DES. If you wish you may email your District Field Officer letting them know your payment request is submitted.

How to Resubmit a Rejected Claim

Payment Requests and their associated Reporting Periods can be sent back to the sub-recipient for a wide variety of reasons, but the goal is to have the payment request corrected so that it can be authorized for reimbursement. Both the Payment Request and the Reporting Period *must* first be rejected by MT DES for them to be revised. Once they are in rejected status, a sub-recipient can then proceed to make the revisions necessary.

Sub-recipients **Must follow all three Steps** to successfully resubmit a claim!

1. How to Revise an Expense
2. How to Revise and Close a Reporting Period
3. How to Revise and Resubmit a Payment Request

How To Revise an Expense

8. Open **Grant Management tab > Grants > Select the Corresponding Grant**
9. Click **Post Award** tab **> Financial > Expenses**
10. **Filter** By desired parameters if any

11. Click the green **Run** button

12. Click the **Edit** (Pencil Icon) next to the **name** of the Expense you want to revise (Must be in **Reviewed** status and not *Closed*)


13. Make appropriate revisions, review for accuracy, then click **Save**

14. When all expenses are updated and saved complete the next steps for "How to Revise and Close a Reporting Period".

How To Revise and Close a Reporting Period

1. Click **Post Award** tab **> Management > Reporting Periods**

2. Click on the **Reporting Period Start date** (noted in green) that is for the period to revise (should be in *Rejected* Status)

3. Review to ensure updated information carried from Expenses, then click **Close**
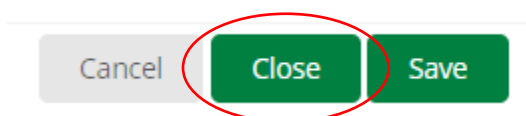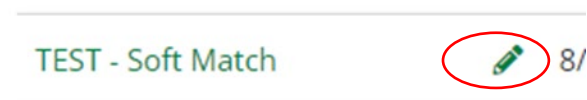

4. Click the **Reporting Periods** tab at the top.
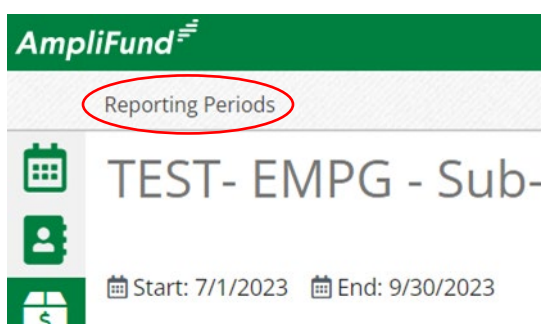
5. Once the reporting period is **closed** complete the next steps "How to Revise and Resubmit Payment Request"

# How to Revise and Resubmit a Payment Request

1. Click **Post-Award** tab **> Cash Flow > Payment Requests**

1. Click the **Edit** (Pencil Icon) next to the **name** of the Payment Request you want to revise (Must be in *Rejected* Status)

2. Complete the **Payment Request Name** following a standard naming convention:
   a. *County/Tribe Name – quarter*
   b. Example: Blaine County - Q1
3. The **Date Created** field should be populated with today's date
4. Under Related Reporting Period(s) select the **corresponding reporting period**
5. In the **Payment Type** dropdown, select **Reimbursement**
6. Under the Financial Detail Section enter in the amount requested in the **Requested Amount** field
7. Enter any comments you want DES to see in the **Comments** field
8. Upload the required supporting documentation which may include the general ledger/finance

report, invoices, receipts, and/or mileage log for expenses in the **Upload File(s) field**.
   a.   If you are claiming soft match, you must also attach an event agenda, sign in roster, and soft match tracker.
9.   If you are not ready to Submit to DES but want to save your changes, click **'Create'**
10. If you are ready to Submit to DES, click **'Submit'**
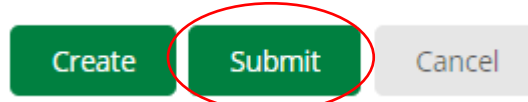
11. If you clicked **Submit** you have completed all steps to resubmitting a payment request (a.k.a. reimbursement claim) to MT DES. If you wish you may email your District Field Officer and Grant Coordinator letting them know your payment request is submitted.
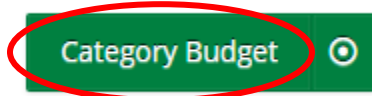
How to Submit an Amendment Request

EMPG Sub-recipients must contact your district grant coordinator for guidance before any grant amendment is requested. EMPG sub-recipients will be allowed to submit Category Budget Amendments through the AmpliFund system. No other amendment requests will be accepted through AmpliFund. If a change of scope is being requested, you will need to submit your request using the change of scope form template provided by MT DES.

How to Submit a Budget Category Amendment

1. Click **Grant Management > Grant > Select Grant Name**
2. Open **Post-Award > Management > Amendments**
3. Click the **+ (Add Icon)** in the Icon Bar
4. Click the ⭕ **(Activate icon)** on the grayed-out tab. After you click the ⭕ **(Activate icon)** the category budget button will turn green.
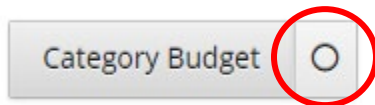
5. Click the **Category Budget** to activate the category budget information and questions to populate down below.

6. Add the proposed **Amendment Name**
   a. *County/Tribe Name Budget Amendment Request #*
   b. Example: Blaine County Budget Amendment Request #1
7. In the **Date Requested** field, enter in today's date. If this field is left empty, the date the amendment is submitted through AmpliFund (i.e., the date the Submit button is clicked) will be recorded.
8. Select all applicable categories by placing a check in the appropriate boxes. If a category is not available, you can add it by clicking **Add New Category**. The Category Name and Proposed Budgeted Category Total fields will appear in the Budget Categories section.

9. Add the **proposed budget amount** by category in the respective **Proposed Budgeted Category Total field(s)**. The current and actuals amount per category is listed above each field for reference. If you have added a new category, you can enter the new category in the **Name Category** field.
10. Add the **Justification** for your proposed amendment. You must provide enough detail to justify why you are requesting the amendment.

a. Note: The system only lets you note what budget categories are being affected by the amendment request. If you need to move funds from one budget category line item to another line item, you must detail that information in the justification field.
Ex. Requesting to move $2,000.00 from Supplies/Accountable Supplies – DES Computer & Printer TO Public Information and Warning System – Code Red

11. To **attach documentation** if needed, click **choose file(s)** to select a file from your computer.

12. Add any internal notes about the amendment for you or your staff to view. MT DES cannot see comments enter in the internal notes field.

13. Click **Save** to save your progress or click **Submit** to send your completed request to DES.
    a. Once you click **Submit** an automated email notification will be sent to your District Grant Coordinator letting them know your budget modification request has been submitted in AmpliFund.