State Homeland Security Program (SHSP) & Nonprofit Security Grant Program (NSGP)

AmpliFund Step-by-Step Guide for Sub-Recipients

Last updated January 2025

Table of Contents

Logging into Amplifund

1) Use this link to access Amplifund
    a. We recommend bookmarking this link, it's specific to Montana and cannot be found by searching for the Amplifund portal in your search engine.
2) Enter your email and password
    a. This is the email and password that was used to complete the application. If you are not the person who applied, please contact your MT DES Coordinator for assistance.

How to View and Edit your Grant

1) In AmpliFund, 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**
5) The Recipient Grant Manager will receive all automatic notifications regarding Approvals and Rejections communicated from DES
6) *Note: The User must be created in AmpliFund for you to select them from the dropdown list.*
7) 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** (left side bar) **> System Security > Users**
2) Click the **'+' icon** in the top right-hand corner
3) Complete the *User Information section*
4) **Subscribe to Daily Emails:** This option allows Users to receive notification, reminder, and update emails on the date they are scheduled
5) **Subscribe to Weekly Emails:** This option allows the User to receive all notifications, reminders, and updates once a week in their inbox
6) **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
7) **Role:** Organizational Admin is the recommended role, and allows users to view, edit, create all awards in your account
8) Complete the *Staff Information* section
9) **First Name, Last Name,** and **Email Address** are all required to create a User
10) Click the **Create** button to create the User
11) 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, click the 'envelope' icon in the top right-hand corner to invite the User to AmpliFund
2) Navigate to **Administration** (left side bar) **> System Security > Users** to access the list of Users and
3) click the envelope icon next the name of the User you want to invite in

4) **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 Submit a Quarterly Performance/Status Report

1) In AmpliFund, navigate to **Grant Management > Grants > Select the Corresponding SHSP or NSGP Grant**
2) At the top of the page click the Custom tab and choose **Performance Report Form (SHSP and Mitigation Grants)**
3) In the top right of the page, click on the **+ icon** to create a new report.
4) Fill out all required fields.
5) Complete the Certification section.

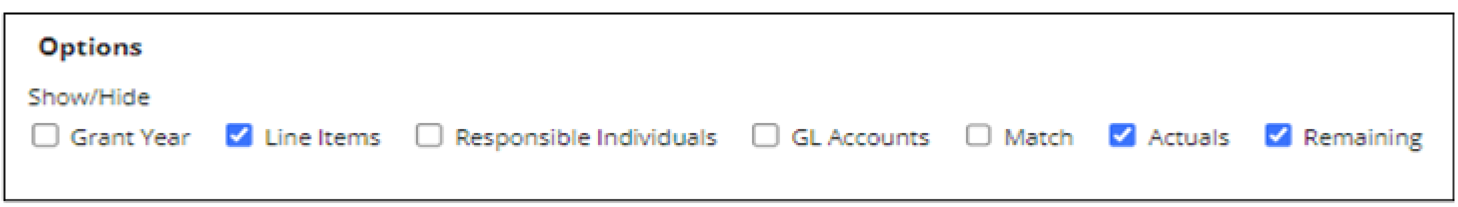
Partially complete Performance Reports can now be saved for future editing prior to submittal by using the **Save as Draft** button at the bottom of the screen:

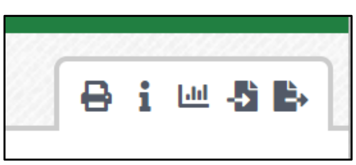
When using this feature, the report will show as a draft and a pencil icon will be displayed to enable editing:

When the report is complete, use the **Submit** button to send the final version to MT DES. Please note that once the report is submitted it is locked for changes. Contact your grant coordinator if revisions need to be made to a submitted report.

Viewing your Budget

Make the most of your funds by accessing your budget categories, actual expenditures, and remaining funds. Often overlooked are the view/hide options. The most helpful to select when viewing your budget are Line Items, Actuals, and Remaining. Navigate to **Post award > Financial > Budget**





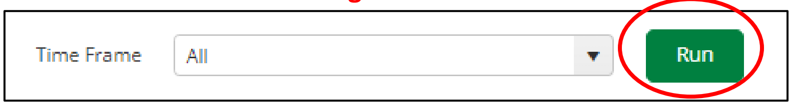
Your budget can be exported as an excel or .pdf report using the icons at the top right of your screen.

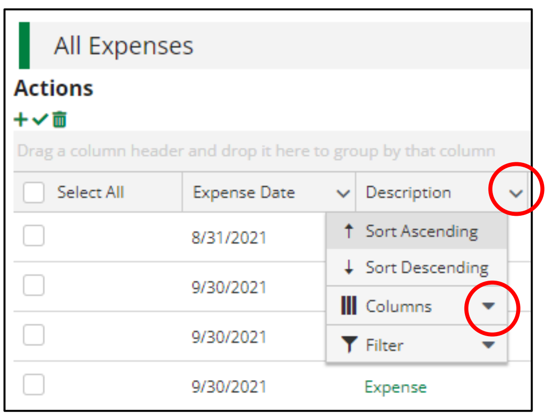
Reimbursement

Sub-recipients have **two steps** to complete when submitting a claim to MT DES.

1. Create Expenses
2. Create and Submit a Payment Request

Creating an Expense

1) Open **Grant Management tab > Grants > Select the Corresponding SHSP Grant > Post-Award > Financial > Expenses**
2) Click the **green Run button** positioned to the right of the "Time Frame" field. This will enable you to see all costs that have been previously entered. If no costs populate towards the bottom of the screen than no expenses have been previously entered into AmpliFund.
    a. NOTE: If you only want to see a select group of expenses you may filter by Category, Line Item, and/or Time Frame and then hit the **green Run button**.
    b. 

    c. NOTE: You can add/delete Columns by clicking the **Drop-Down Arrow** next to any column name, then click the **Columns Drop-Down Arrow**, then select/deselect the appropriate columns you want to see/not see.
    d. 

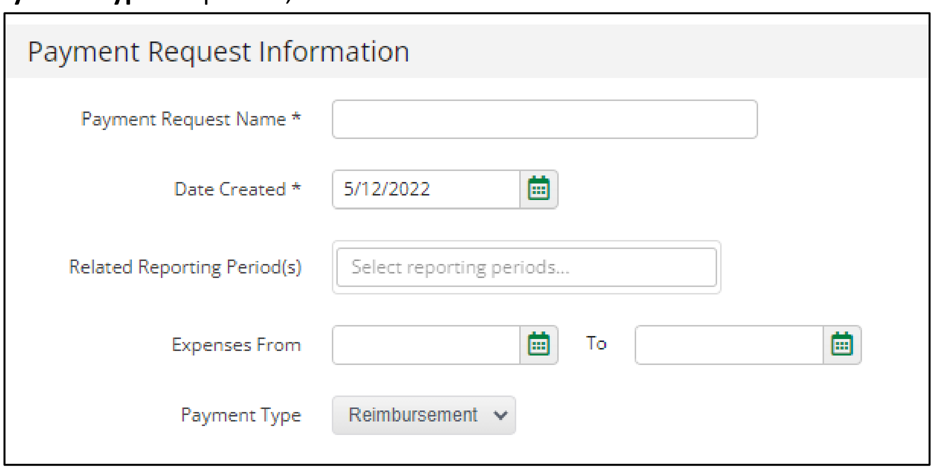
3) When ready to enter an expense, click the **+** to add an expense
    a. 

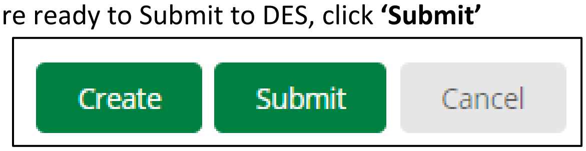
4) The expense window will appear where you can add an expense record
5) Choose a **budget Category** from the dropdown menu
6) Select a **Line Item** from the dropdown menu
7) Enter the total amount for the Expense in the **Direct Cost field**
8) Select a Date for the Expense in the **Expense Date** field
    a. Note: This should be the date the expense occurred. NOT the date you are entering the expense.
9) Choose **Reviewed** in the Expense Status dropdown menu
10) Add in any details you would like to record in the Description field.
11) Skip the **Financial** tab
12) Skip the **Attachments** tab

    a. Note: you will upload supporting documentation attachments in a later step.
13) Navigate to the **Custom** tab
    a. Note: The Custom tab only needs to be filled out if you are claiming equipment.
14) Click **Create** to create the expense
    a. 

15) Enter in all expenses for that quarter by repeating steps 3 through 14 noted above.
16) When all expenses are entered you MUST COMPLETE the next steps for "How to Create and Submit a Payment Request".

Create and Submit Reimbursement Claim/Payment Request

1) Click the **Post-Award** dropdown menu and click **Cash Flow > Payment Requests**
2) Click the **+** icon in the top right-hand corner in order to create a Payment Request
3) Complete the **Payment Request Name** following a standard naming convention:
    a. *Jurisdiction/Agency Name – quarter*
    b. Example: Billings Fire Department - Q1
4) The **Date Created** field should be populated with today's date
5) In the **Expense From and To** boxes enter the date range for your expenses
6) In the **Payment Type** dropdown, select **Reimbursement**
    a. 

7) Under the Financial Detail Section enter in the amount requested in the **Requested Amount** field
8) Enter any comments you want DES to see in the **Comments** field
9) Upload the required supporting documentation which may include general ledger/finance report, invoices, and receipts for expenses in the **Upload File(s) field**.
10) If you are not ready to Submit to DES but want to save your changes, click **'Create'**
11) If you are ready to Submit to DES, click **'Submit'**
    a. 

12) 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 Grant Coordinator letting them know your payment request is submitted.

How to Submit an Amendment Request (New for 2024)

Sub-recipients must contact your MT DES Grant Coordinator for guidance before any grant amendment is requested. Sub-recipients will be allowed to submit Category Budget and Award Duration/Extension Amendment requests 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.

Marking a Task Complete (Notification Emails)

AmpliFund provides a **Task** function to track the completion of quarterly reporting and other items. Tasks can be system-generated or user-created. The **Task** function is built into AmpliFund, but the level of use can be adjusted to suit the needs of the user.

Once a task has been assigned, the assignee 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**.
2) Click the ✔ **(Mark as Complete icon)** next to a task name.
3) In the confirmation pop-up window, click **Mark as Complete**
4) OR
5) Open **Activity > Calendar**.
6) Click on a **task**.
7) In the pop-up window, click **Mark as Complete**

For assistance with customizing the **Tasks** function, please contact your grant coordinator.

Tips and Troubleshooting

AmpliFund Log-in: https://mt.amplifund.com/account/Login.aspx

Why was my Performance/Status Report rejected?

A performance report may be rejected by the Grant Coordinator if it does not contain sufficient information. Please detail the progress you are making in complete sentences; the information will be included in a semi-annual report to FEMA. If no progress has been made, please share barriers that might be keeping your project from progressing.

Reimbursement Claim/Payment Request was Rejected

Any error with the Payment Request will result in it being "rejected" by MT DES for corrections. The "rejected" status allows the subrecipient editing access to the claim after it has been submitted. This is a very common occurrence, and some claims may go back and forth between the subrecipient and grant coordinator several times. The most common reason is an error with the expenses.

Common reasons a Payment Request will be rejected:

- Expense entry errors
- Having multiple Payment Request drafts for the same claim
- Expense and Payment Request Date range errors
- Missing/insufficient documentation
  - Ledger does not have employee names for salary/fringe
  - Missing mileage tracker, soft-match tracker, etc.

General Steps for accessing your Expenses to Edit:

1) Open **Grant Management tab** (left side bar) **> Grants > Select the Corresponding Grant**
2) Click **Post Award** tab **> Financial > Expenses**
3) Optional: filter by category or date range if that is helpful
4) Click the green **Run** button
5) Click the **Edit** (Pencil Icon) next to the **name** of the Expense you want to revise
6) Make appropriate revisions, review for accuracy, then click **Save**

The Expense(s) are not attached/visible within the Payment Request

- Is your expense in "Reviewed" status?
- Is your expense date within the range you have set for the payment request?
- Do you have multiple payment request drafts for the same claim? (see Payment Requests)

Expense totals do not equal the "requested amount" within the Payment Request

- If you update an expense amount, you MUST update the "requested amount" in your payment request. Although the total will update, it WILL NOT update your amount requested for you.

Post Award > Cash flow > Payment Requests > Pencil Icon > Enter corrected "requested amount" and submit.

<u>Resubmit a rejected Reimbursement Claim/Payment Request</u>

1) In AmpliFund, open **Grant Management tab > Grants > Select the current year's EMPG Grant**
2) Click **Post-Award** tab **> Cash Flow > Payment Requests**
3) Click the **Edit** (Pencil Icon) next to the **name** of the Payment Request you want to revise (The payment request be in *Rejected* Status to enable editing.)
    a. 

4) Make the necessary edits and click on the **Submit** button to send the payment to MT DES

5) Note: AmpliFund will notify your grant coordinator that the payment request has been submitted.