Emergency Management Performance Grant (EMPG)

AmpliFund Step-by-Step Guide for Sub-Recipients

Last updated December 2023

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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**.
2. Click the ✓ **(Mark as Complete icon)** next to a task name.
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

STEP 1: Update your Quarterly EMPG Workplan:
   a) Open the most current version of your EMPG Workplan. This is something you should have saved to your computer.
   b) Select the reporting period.
   c) Update information in Section 1 and Section 2 as needed.
   d) Complete Section 3 with updates on Quarterly Performance and Reporting.
   e) Complete Section 4 by adding a brief narrative for Priority Areas and Activities, as applicable.
   f) Save the updated document to your computer in its current format as a FILLABLE PDF. Any other formats cannot be accepted.
   g) Complete STEP 2 found below.

The Workplan is a living document with new information being added throughout the grant year. Each reporting period, updates are made to the Workplan based on the activities from the preceding quarter. As you progress through each quarter it is best practice to save the most current workbook document to your computer and then upload it to AmpliFund for your quarterly report submittal. Always keep a backup of the most current EMPG workplan for your records. MT DES only has a copy of the most recently submitted version.

STEP 2: Create and Submit Quarterly Report in AmpliFund:
   a) In AmpliFund, navigate to **Grant Management > Grants > Select the 202X EMPG Grant**
   b) At the top of the page click the Custom tab and choose **Performance Report Form (EMPG 202X)**
   c) In the top right of the page, click on the **+ icon** to create a new report.
   d) Fill out all required fields.
   e) Click on the **Choose File** button to navigate to your saved Workplan.
   f) Complete the Certification section.

NEW FEATURE! 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:
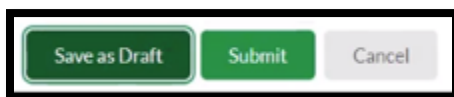
When using this feature, the report will show as a draft and a pencil icon will be displayed to enable editing:
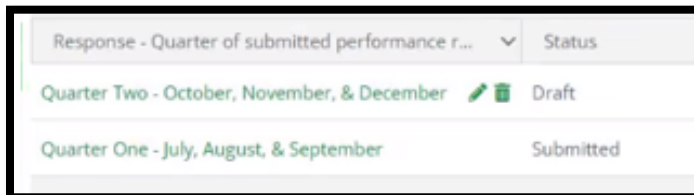
When the report is complete, use the **Submit** button to send the final version to MT DES. Please note that once the report is submitted it is locked for changes. Contact your grant coordinator if revisions need to be made to a submitted report.

How to Submit a Quarterly Claim

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

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

How To Create an Expense

Creating an Expense:

1.   Open **Grant Management tab > Grants > Select the Corresponding EMPG 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. 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**.

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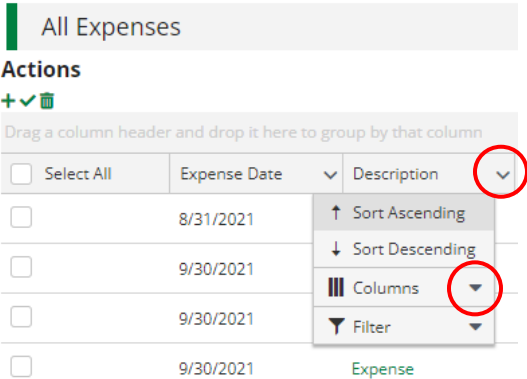
3.   When ready to enter an expense, click the **+** to add an expense

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.

       a.   **Mileage Expense:** Enter Total Milage and Rate per Mile

       b.   **Equipment Expense:** Fill in the Equipment Inventory on the Custom Tab

11.   Click the **Financial** tab

12.   In the Cash Match Amount field type **0.50 Percentage**


13.   For EMPG you can skip the Attachments or Custom tabs.

       a.   Note: you will upload supporting documentation attachments in a later step.

14.   Click **Create** to create the expense

15.   Enter in all expenses for that quarter by repeating steps 3 through 14 noted above.

16.   When all expenses are entered complete the steps for "How to Create and Submit a Payment Request" found on the next page

Creating an Expense for Soft Match:

1.   From the **Expense** page, click the **+** icon to add an expense
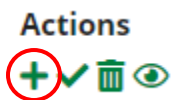
2.   The expense window will appear where you can add an expense record

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**

	Amount			
Cash Match Amount		50.00 %	Dollar	Percentage
In Kind Amount		0.00 %	Dollar	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

[Create]   [Cancel]

17. When all expenses are entered complete the steps for "How to Create and Submit a Payment Request" found on the next page

How to Create and Submit a 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. *County/Tribe Name – quarter*
    b. Example: Blaine County - 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 that quarter
6. In the **Payment Type** dropdown, select **Reimbursement**

Payment Request Information

|	
Payment Request Name *	
Date Created *	5/12/2022 📅
Expenses From	📅 To 📅
Payment Type	Reimbursement ∨

7. Under the Financial Detail Section enter in the amount requested in the **Requested Amount** field. To determine the **Requested Amount**, reference the **Expensed** column total, and divide that by 2 to calculate the 50% federal amount being reimbursed.

Financial Detail

	Expensed	Cash Match	In-Kind Match	Other Funding	Match	Grant Funded	Grant-Funded Remaining ⓘ
A. Organization: Personnel Salary	$18,624.99	$9,312.50	$0.00	$0.00	$9,312.50	$9,312.49	$32,687.51
B. Organization: Fringe Benefits	$5,879.76	$2,939.90	$0.00	$0.00	$2,939.90	$2,939.86	$10,060.14
Totals	**$24,504.75**	**$12,252.40**	**$0.00**	**$0.00**	**$12,252.40**	**$12,252.35**	
Requested Amount	$12,252.37 ❗						

Note: If an error message pops up (red exclamation mark) you may always contact your grant coordinator if you have questions.

8. Enter any comments you want DES to see in the **Comments** field
9. 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.
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'**. Upon hitting Submit, AmpliFund will generate an email notification to your assigned grant coordinator.

Create   Submit   Cancel
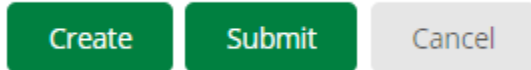
How to Resubmit a Rejected Claim

Payment Requests 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. The Payment Request *must* first be rejected by MT DES for it and its expenses 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 Steps** to successfully resubmit a claim!

1. How to Revise an Expense
2. How to Revise and Resubmit a Payment Request

How To Revise an Expense

1. Open **Grant Management tab > Grants > Select the Corresponding Grant**
2. Click **Post Award** tab **> Financial > Expenses**
3. **Filter** By desired parameters if any

| Filter By		
Grant	FY21 EMPG - Beaverhead County ▼	Time Frame All ▼ **Run**
Category	Select a Category... ▼	
Line Item	Select a Budget Item... ▼	
	Clear all filters	

4. Click the green **Run** button

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

☐ Select All	Expense Date	Description	Expense Status
☐	12/1/2021	Test ✏️	Reviewed
☐	1/21/2023	Test Payment Request and Rejection	Closed

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

7. When all expenses are updated and saved complete the next steps for "How to Revise and Resubmit a Payment Request".

How to Revise and Resubmit a Payment Request

1. Click **Post-Award** tab **> Cash Flow > Payment Requests**
2. Click the **Edit** (Pencil Icon) next to the **name** of the Payment Request you want to revise (Must be in *Rejected* Status)
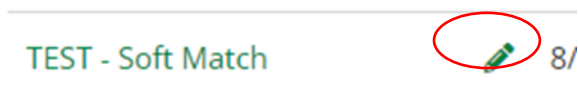
TEST - Soft Match   ✏️ 8/

3. Complete the **Payment Request Name** following a standard naming convention:
   a. *County/Tribe Name – quarter*
   b. Example: Blaine County - 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 that quarter
6. In the **Payment Type** dropdown, select **Reimbursement**

Payment Request Information
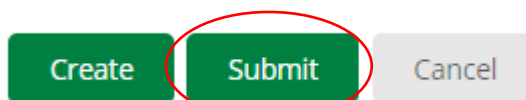
Payment Request Name *

Date Created *   5/12/2022   📅

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

Expenses From   📅   To   📅

Payment Type   Reimbursement ∨

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 the general ledger/finance report, invoices, receipts, and/or mileage log for expenses in the **Upload File(s) field**.
   c. If you are claiming soft match, you must also attach an event agenda, sign in roster, and soft match tracker.
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'**

Create   Submit   Cancel

12. 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.
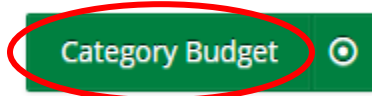
How to Submit an Amendment Request

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.
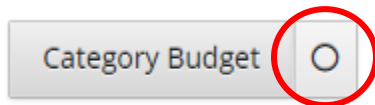
5. Click the **Category Budget** to activate the category budget information and questions to populate down below.

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 being revised by placing a check in the appropriate boxes. If a category is not available, you can add it by clicking **Add New Category**. Note: before adding a new category, please contact your grant coordinator for guidance. The Category Name and Proposed Budgeted Category Total fields will appear in the Budget Categories section.

9. Add the proposed budget amount for each category in the respective **Category Proposed Budgeted** field(s). The current and actuals amount per budget category is listed to the right of each field for reference. If you have added a new category, you can enter the new category in the **Name Category** field.

a. Note: The amounts entered in the **proposed budget amount** should be the new totals for that budget category.
b. Example: If you are moving $1000 from supplies to travel you would add $1000 to the current travel budget amount and subtract $1000 from the current supplies amount.

Budget Categories*

Category	Proposed Budgeted Category Total	Current Budgeted Category Total	Actuals Total
E. Supplies / Accountable Supplies	$9,000.00	$10,000.00	$0.00
D. Travel for EMPG	$6,000.00	$5,000.00	$0.00

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.
    b. Example: Requesting to move $1,000.00 from Supplies/Accountable Supplies – General DES Office Supplies, Printer & Scanner, Smartboard TO Travel - DES Related Travel: Hotel and Mileage

Justification	Move $1000 from Supplies/Accountable Supplies - General DES Office Supplies, Printer & Scanner, Smartboard TO Travel - DES Related Travel: Hotel and Mileage.

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.

Save   Submit   Cancel