AmpliFund

Applicant Portal User Guide

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Applicant Portal Overview

The AmpliFund *Applicant Portal* allows organizations to submit applications to a funding opportunity. This guide for applicant users explains how to navigate the Applicant Portal, complete funder application forms, and add budget and performance plans during the application process.

Applicants may have received an opportunity-specific link from the funder, or a link to all of the funder's open opportunities.

Icons

- Print
- Help
- Edit

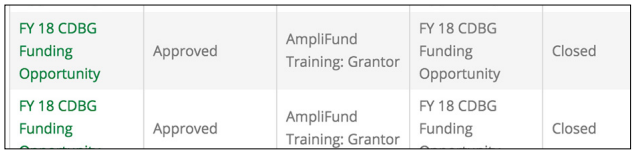
Getting Started on the Applicant Portal

Here are the steps applicant users should take to set up their Applicant Portal account before starting their opportunity application.

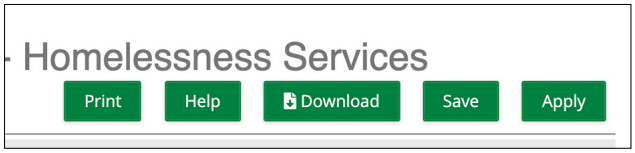
How To Create an Account on the Applicant Portal

The first time you access an opportunity through the Applicant Portal, you will be prompted to create a login and password. Alternatively, users may have received an email invitation from another user in their organization. Once you register, you will be able to access the opportunity.

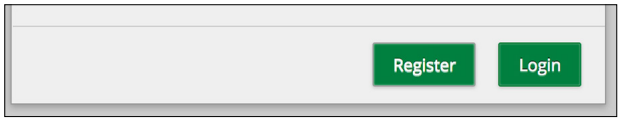
1. Use the **opportunity link** from the funder.
2. Click an open **opportunity name**.



3. Click **Apply** to the right of the opportunity name.



4. On the login screen, click **Register**.



Warning
Each user must have a unique email address across all Applicant Portal accounts.

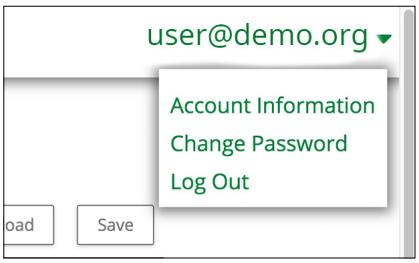
5. On the *Create New Account* page, add your **user information**, c**ontact information**, and **organization information**. All required fields are noted with an asterisk (*).
6. Click **Register**.

7. Click to **I Accept** to accept AmpliFund's terms and conditions.

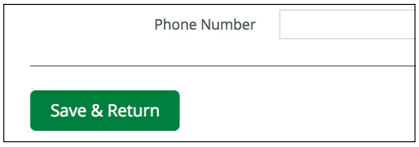
How To Edit Your Account Information

On the *Account Information* page, users may view and edit their password, contact information, and organization information.

1. Click your **email address** on the top-right corner of any page.



2. In the dropdown menu, select **Account Information**.
3. On the *Account Information* page, click **Edit**.
4. Update the information as necessary.
5. Click **Save & Return**.

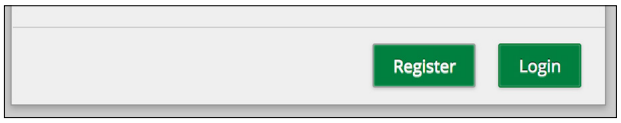


How To Log In to the Applicant Portal

Once you have registered on the Applicant Portal, use your email and password to log in to the Applicant Portal to access your saved, started, and submitted applications.

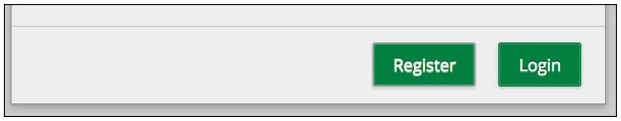
1. Use the **opportunity link** from the funder.
2. Click **Log In** in the top-right corner.

3. In the login window, enter your **Email** and **Password**.
4. Click **Login**.



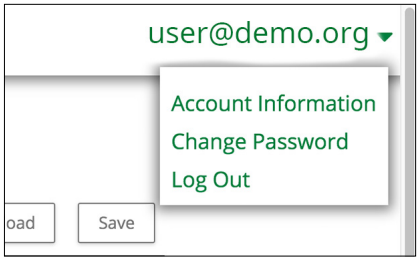
-- OR --

1. Go to **gotomygrants.com**.
2. In the login window, enter your **Email** and **Password**.
3. Click **Login**.



How To Log Out of the Applicant Portal

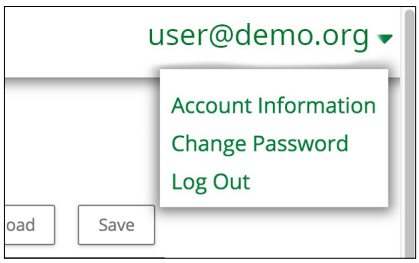
1. Click your **email address** on the top-right corner of any page.



2. In the dropdown menu, select **Log Out**.

How To Change Your Password

1. Click your **email address** on the top-right corner of any page.



2. In the dropdown menu, select **Change Password**.
3. Update the information as necessary.
4. Click **Save & Return**.

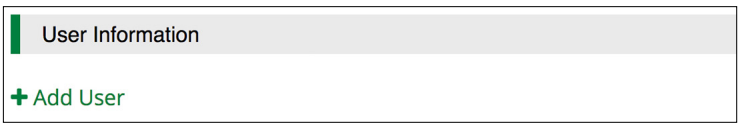
How To Invite Users to Your Organization Account

Prerequisite: Must be an Administrator user. The first user to register in an organization is an Administrator by default.

1. Open the **Applicant Portal**.
2. Click the **logo** in the top-left corner of any page.

3. Click **Users**.

4. Click **+ Add User**.



Warning
Each user must have a unique email address across all Applicant Portal accounts.

5. Add the user's **Email Address**.

6. Select the user's **Role**.
   - **Administrator:** Administrators can create, edit, delete, and withdraw applications; create and edit accounts; and add new users.
   - **Editor:** Editors can edit applications and update their account settings.

Contact Information

7. Add the **user's name, mailing address,** and **phone number**. Required fields are marked with an asterisk (*).
8. Click **Invite**.

Icons

- Print
- Help
- Create
- Edit
- Delete

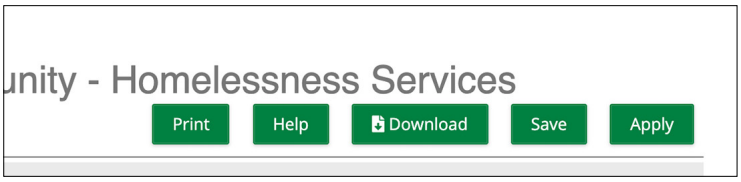
Managing and Applying to Opportunities

Once you have registered in the Applicant Portal, you can save opportunities, access the funder's forms and templates, and submit the application to the funder.

How To Save an Opportunity

Opportunities can be saved before submitting. Saved opportunities can be accessed by clicking the funder's logo in the top-left corner of the Applicant Portal.

1. Use the **opportunity link** from the funder.
2. On the opportunity details page, click **Save**.



How To View the Applications List

Saved and submitted applications can be viewed on the Applications list.

1. Click the **logo** in the top-left corner of any page.

2. Click **Applications**.

How To Delete an Application

Once deleted, applications will no longer be accessible.

Prerequisite: Must be an Administrator user and application cannot be submitted.

1. Click the **logo** in the top-left corner of any page.

2. Click **Applications**.

3. Click the 🗑 **(Delete icon)** next to an application name.

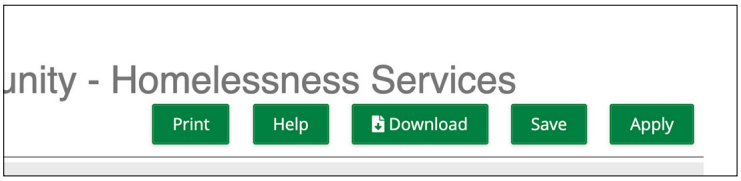
Application Na...	Submission Sta...	Funder Name	Title
Public Service Funding Opportunity - Homelessness Services 🗑	Unsubmitted	AmpliFund Training Grantor	Public Service Funding Opportunity - Homelessness Services

4. In the confirmation pop-up window, click **Delete**.

How To Start an Application

Applications may be started from previously saved opportunities, or may be started directly from the opportunity link after registering.

1. Use the **opportunity link** from the funder.
2. On the opportunity details page, click **Apply**.

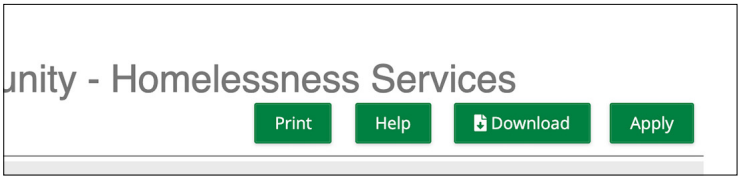


--OR--

1. Open the **Applicant Portal**.
2. Click the **logo** in the top-left corner of any page.

3. Click **Applications**.

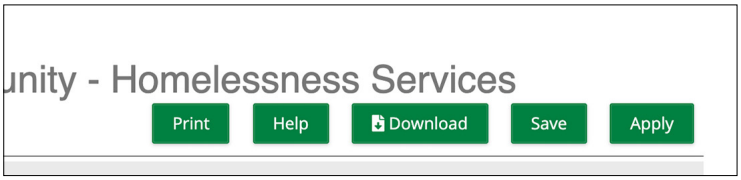
4. Click an **opportunity name**.
5. Click **Apply**.



How To Download an Application

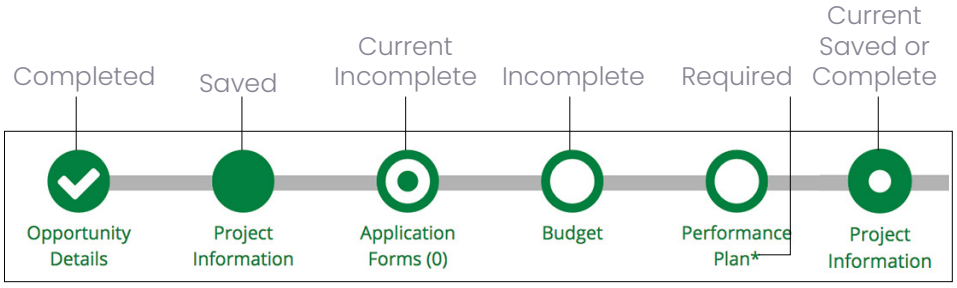
Applications can be downloaded at any time in the application process.

1. Use the **opportunity link** from the funder.
2. On the opportunity details page, click **Download**.



Application Progress

In the Applicant Portal, the application progress is displayed at the top of every page. You can also navigate to any page in the application by clicking the icon above the page's name in the progress bar. If a page is required for submission, an asterisk will appear next to the page name in the progress bar.



Icons

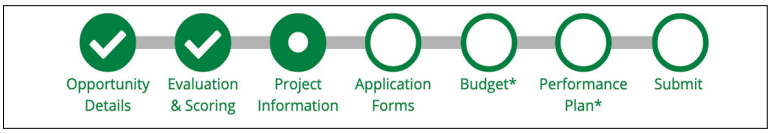
- Completed
- Saved
- Incomplete
- Current Incomplete
- Current Saved or Complete

Project Information

You can add your application information and primary contact information on the Project Information page. If the funder requires a Cash Match and/or an In-Kind Match, those amounts can be added in this section.

How To Complete Project Information

1. Open the **opportunity**.
2. Click **Project Information**.

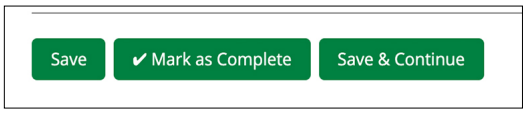


Application Information

3. Add the **Application Name**. The application name defaults to the opportunity name.
4. Add the **Award Requested**. This is the total amount you are requesting from the grant funder.
5. Add the **Cash Match Contributions** and **In-Kind Match Contributions**, if applicable. This is the amount you are planning to contribute to the project. It may differ from the funder's calculated required amount.

Primary Contact Information

6. Add the application's primary **contact information**. The information in this section defaults to the contact information provided by the user who started the application. This user will receive an email notification if the application is reopened.
7. Click **Save** to save your progress, **Mark as Complete** to save the page and mark as complete, or **Save & Continue** to save your progress and move to the next page. Your information will not be shared with the funding organization until you click **Submit** on the Submit page.



Icons

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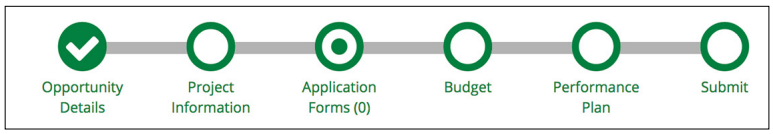
Application Forms

Application forms are funder-created custom forms that capture additional information about applicant organizations, activities, and proposed projects.

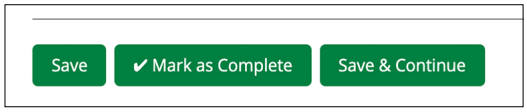
How To Complete Application Forms

The forms and fields will vary depending on the opportunity.

1. Open the **opportunity**.
2. Click **Application Forms**.



1. Click a **form name**.
2. Add **responses** to the funder's customized form. The form may contain text, multiple choice, or dropdown list questions, or requests for file upload.
3. Click **Save** to save your progress, **Mark as Complete** to save the page and mark as complete, or **Save & Continue** to save your progress and move to the next page. Your information will not be shared with the funding organization until you click **Submit** on the Submit page.



Icons

- Completed
- Saved
- Incomplete
- Current Incomplete
- Current Saved or Complete
- Add or Create
- Edit
- Delete

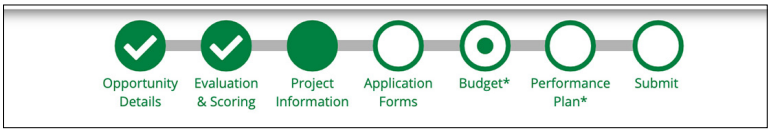
Budget

Depending on the opportunity settings, the funder may provide a budget for you to complete.

How To Add a Budget Category

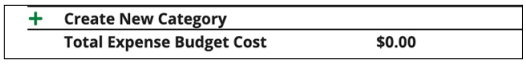
Funders may provide a list of budget categories to use as you complete the template. Funders may also allow applicants to create their own budget categories. If this is permitted, **+ Create New Category** will appear on the budget.

1. Open the **opportunity**.
2. Click **Budget**.



Proposed Budget

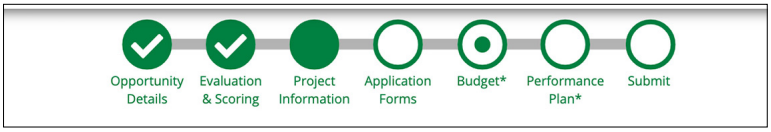
3. Click the **+ (Add icon)** next to *Create New Category*.



4. In the pop-up window, add category **Name**.
5. Add category **Description** (optional)
6. Click **Save**.

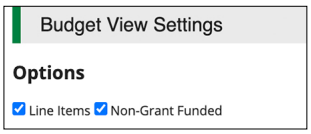
How To Add a Budget Line Item

1. Open the **opportunity**.
2. Click **Budget**.



Budget View Settings

3. Check the **Line Items** checkbox to view line Items.



Proposed Budget

4. Click the **+ (Add icon)** next to a budget category name.

5. In the pop-up window, update **Category,** if necessary.
6. Select the line item **Type**.
   - **Personnel Line Item:** budgeted staff compensation expenses
   - **Non-Personnel Line Item:** budgeted expenses that do not fund staff compensation
   - **Benefit Type Line Item:** planned benefit expenses for all grant-funded staff
7. Add the line item **Name**.
8. Add the **Direct Cost.**
9. If available, select if the line item is **Non-Grant Funded**.
   a. If *Yes*, add the **dollar amount** or **percent (in decimal format)** of the line item that will be funded by Cash Match or In-Kind Match.

10. Add the line item **Narrative** (optional).
11. Click **Save**.

Icons

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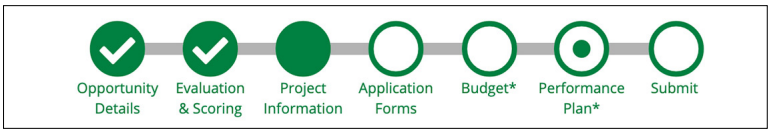
Performance Plan

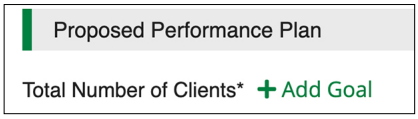
Depending on the opportunity settings, there may be a Performance Plan page. Funders may also include defined programmatic goals for applicants to meet through grant activities. If goals have been predefined, they will appear in the goal type dropdown.

How To Add a Performance Goal

1. Open the **opportunity**.
2. Click **Performance Plan**.



3. Click **+ Add Goal**.



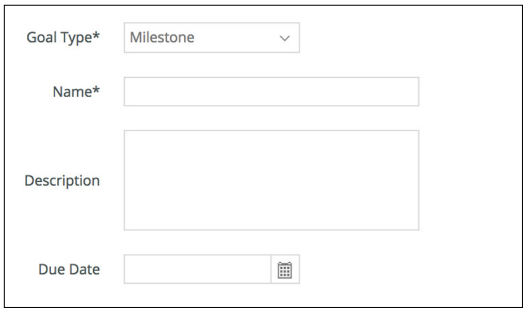
4. In the pop-up window, select a **Goal Type**. The available goal types may vary depending on the opportunity settings.
   - **Milestone:** Track completion of grant milestones (i.e. Will you complete X?)
   - **Narrative:** Capture a narrative response (i.e. How will you complete X?)
   - **Numeric:** Track discrete numbers to achieve (i.e. Will you achieve X number?)
   - **Percent Achieved:** Track a percent to achieve (i.e. Will you achieve X%?)
   - **Percent Change:** Track a percent increase or decrease (i.e. Will you achieve X% increase?)
   - **Reimbursement:** Track discrete units to achieve with a dollar rate per unit (i.e. Will you achieve X units with a reimbursement rate of $Y/unit?)
5. Add a goal **Name**.
6. Add the **goal information**. The fields will vary depending on the goal type.
7. Click **Save**.

How To Add a **Milestone** Goal

Milestone goals are the most basic goal type. They allow for tracking progress on the completion of a "pass or fail" goal. An example of a

milestone goal is "Create and send Q1 Staff Survey."

1. Click **+ Add Item**.
2. In the pop-up window, select **Milestone** from the *Goal Type* dropdown.

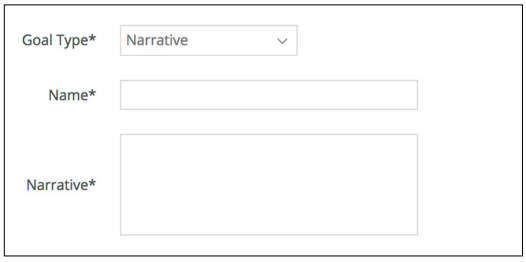


3. Add a goal **Name**.
4. Add the goal **Description** (optional).
5. Click **Save**.

How To Add a **Narrative** Goal

Narrative goals are question and answer goals. Responsible staff members may answer the question posed by the goal. An example of a narrative goal is "How successful was the grant-related activity this period?"

1. Click **+ Add Item**.
2. In the pop-up window, select **Narrative** from the *Goal Type* dropdown.

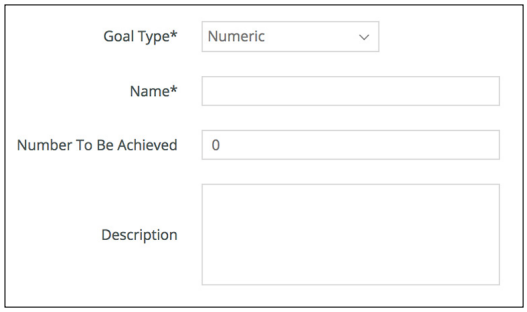


3. Add a goal **Name**.
4. Add the goal **Narrative**.
5. Click **Save**.

How To Add a **Numeric** Goal

Numeric goals are a discrete number to achieve. As units of the goal are completed, staff may record units completed. An example of a numeric goal is "number of program participants" with a goal target of 50.

1. Click **+ Add Item**.
2. In the pop-up window, select **Numeric** from the *Goal Type* dropdown.

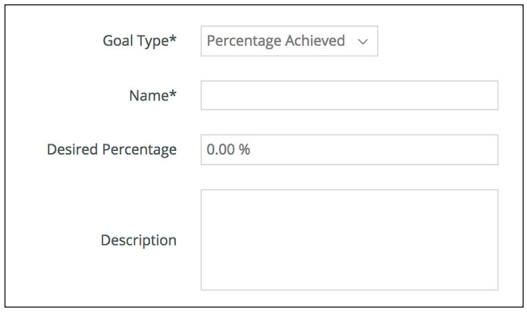


3. Add a goal **Name**.
4. Add the goal **Number To Be Achieved** (optional).
5. Add the goal **Description** (optional).
6. Click **Save**.

How To Add a **Percent Achieved** Goal

Percent achieved goals are goals to reach a desired percent. When tracking progress against a percent achieved goal, staff may capture Total Possible and Total Achieved percentages. An example of a percent achieved goal is "Volunteer Retention Rate" with a goal target of 70%.

1. Click **+ Add Item**.
2. In the pop-up window, select **Percent Achieved** from the *Goal Type* dropdown.



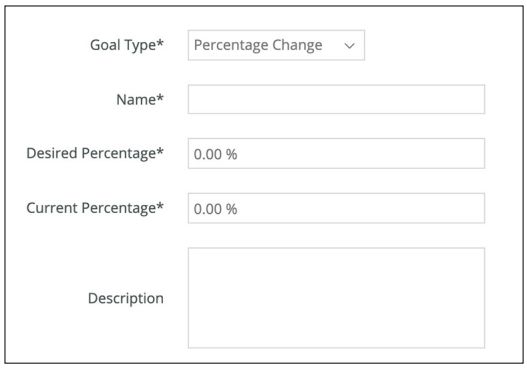
3. Add a goal **Name**.
4. Add the **Desired Percentage** in decimal format (optional).
5. Add the goal **Description** (optional).
6. Click **Save**.

How To Add a **Percent Change** Goal

Percent change goals are goals to track a percent increase or decrease. Percent change goals are defined with a starting percent and a desired percent. When tracking progress against a percent change goal, staff may capture Total Possible and Total Achieved percentages. An example of a percent change goal is "Decrease in Student Absences" with a starting

absentee rate of 10%, and a goal absentee rate of 3%.

1. Click **+ Add Item**.
2. In the pop-up window, select **Percent Change** from the *Goal Type* dropdown.

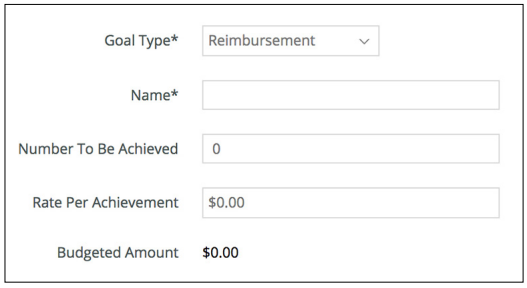


3. Add a goal **Name**.
4. Add the **Desired Percentage** in decimal format.
5. Add the **Current Percentage** in decimal format.
6. Add the goal **Description** (optional).
7. Click **Save**.

How To Add a **Reimbursement** Goal

Reimbursement goals are goals with a discrete unit to achieve, and a dollar rate associated per unit. When tracking progress against a reimbursement goal, staff may enter Units Achieved. An optional checkbox field appears on each reimbursement goal type labeled "Add as budget item." If the goal is added as a budget item, the reimbursement goal will appear as part of the grant's expense budget. If a reimbursement goal is shown on the grant budget, any updates made to the goal through the performance plan will automatically update the budget. An example of a Reimbursement goal is "Number of Patient Screenings" with target/maximum units of 100, and a reimbursement rate per unit of $22. Reimbursement goals are used to support pay for performance grants.

1. Click **+ Add Item**.
2. In the pop-up window, select **Reimbursement** from the *Goal Type* dropdown.



3. Add a goal **Name**.
4. Add the **Number To Be Achieved** (optional).
5. Add the **Rate Per Achievement** (optional).
6. Add the goal **Description** (optional).
7. Click **Save**.

Icons

- Completed
- Saved
- Incomplete
- Current Incomplete
- Current Saved or Complete
- Add or Create
- Edit
- Delete

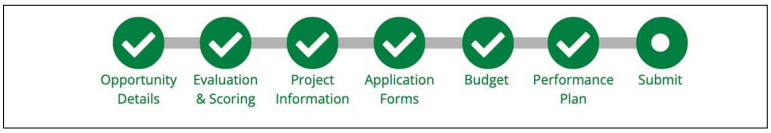
Submitting Your Application

Once all required fields and sections have been completed, your application can be submitted to the funding organization. The funding organization will be notified that your application is ready for review. In some cases, the funding organization may reopen your application for editing. If this happens, you will receive an email notification from no-reply@gotomygrants.com that will include a link to the application and further instructions from the funder.

How To Review Your Application

You can download your application and its materials for review before submitting.

1. Open the **opportunity**.
2. Click **Submit**.



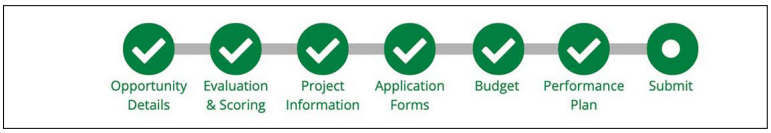
3. Click **Application.**

How To Submit Your Application

Prerequisite: Must be an Administrator user and all required sections must be Marked as Complete.

Submitted applications can be viewed on Application list.

1. Open the **opportunity**.
2. Click **Submit**.



3. Click **Submit.**

Warning

Once your application has been submitted, you cannot add, edit, or delete any application information.

How To Withdraw Your Application

Prerequisite: Must be an Administrator user

After you have submitted your application, you may withdraw your application at any time before the opportunity's archive date. A withdrawn

application cannot be resubmitted.

1. Click the **logo** in the top-left corner of any page.

2. Click **Applications**.

3. Click the **submitted application name**.
4. Click **Withdraw**.

Warning
Once you withdraw your application, it cannot be resubmitted.

5. In the confirmation pop-up window, click **Withdraw**.

Icons

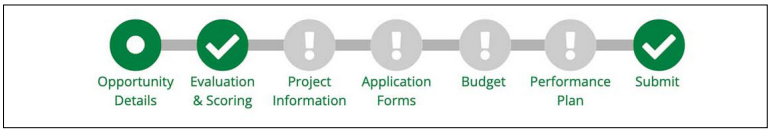
- Completed
- Reopened
- Saved
- Incomplete
- Current Incomplete
- Current Saved or Complete
- Add or Create
- Edit
- Delete

Reopened Applications

If your application is reopened, the Primary Contact you indicated on Project Information will receive an email from the funder. If the primary contact is not an Administrator user in your account, an Administrator user will be copied on the email notification. The email will contain instructions from the funder, a list of reopened sections, and a copy of your original application.

How To Edit Your Reopened Application

1. Open the **opportunity**.
2. Navigate to **reopened section(s)**. Reopened sections are indicated with a gray circle with an exclamation mark. Funder comments are available at the top of each reopened section.



3. Update information as necessary.
4. Click **Save** to save your progress, **Mark as Complete** to save the page and mark as complete, or **Save & Continue** to save your progress and move to the next page.

Note

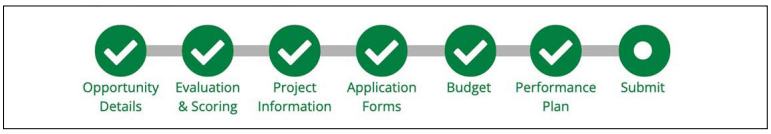
For reopened applications only, the funding organization will be able to view any updated information that you have saved. They may reach out to provide further instructions or clarification as you edit your application.

How To Resubmit Your Application

Prerequisite: Must be an Administrator user and all reopened sections must be Marked as Complete.

Reopened applications can be resubmitted after the Submission Close Date has passed.

1. Open the **opportunity**.
2. Ensure all sections are Marked as Complete. If Application Forms have been reopened, all forms must be Marked as Complete.
3. Click **Submit**.



4. Click **Submit.**

Warning

Once your application has been submitted, you cannot add, edit, or delete any application information.

Frequently Asked Questions

How do I link my account to my organization's account?

If you received an email invitation from an organization user, your account is already linked to the organization account.

Who has access to the organization's applications?

All users tied to the organization can view and edit all open applications. Only Administrator users can create, delete, or withdraw applications.