



*AmpliFund*



# Recipient Training

Juvenile Welfare Board of Pinellas County

# Juvenile Welfare Board Welcome

## *Juvenile Welfare Board*

### *AmpliFund Implementation Team*

**Laura Krueger Brock**, *Chief Financial Officer*

**Laura Peele**, *Director of Information Technology*

**Diana Carro**, *Budget and Business Services Manager*

**Lori Lewis**, *Program Finance Manager*

**Karen Woods**, *Program Administration Manager*

**Kelly Grossman**, *Senior Program Consultant*

**Braxton Everett**, *Program Financial Analyst*

**Erin Craig**, *Senior Program Financial Analyst*

**Stacey Gill**, *Senior Program Financial Analyst*

**Pete Shaw**, *Software & Data Delivery Manager*

# Agenda

- Welcome & Overview
- Getting Started in AmpliFund
- Entering Expenses & Submitting a Reporting Period & Payment Request
- Completing Position Change Request Form
- Submitting an Amendment Request
- Completing an Other Funding Change Form
- Reporting
- Support Resources
- Q&A

# Welcome to AmpliFund!

## SaaS Based Grant Management Solution

- Accessible via web browser
- No installation required

## Enables enhanced collaboration

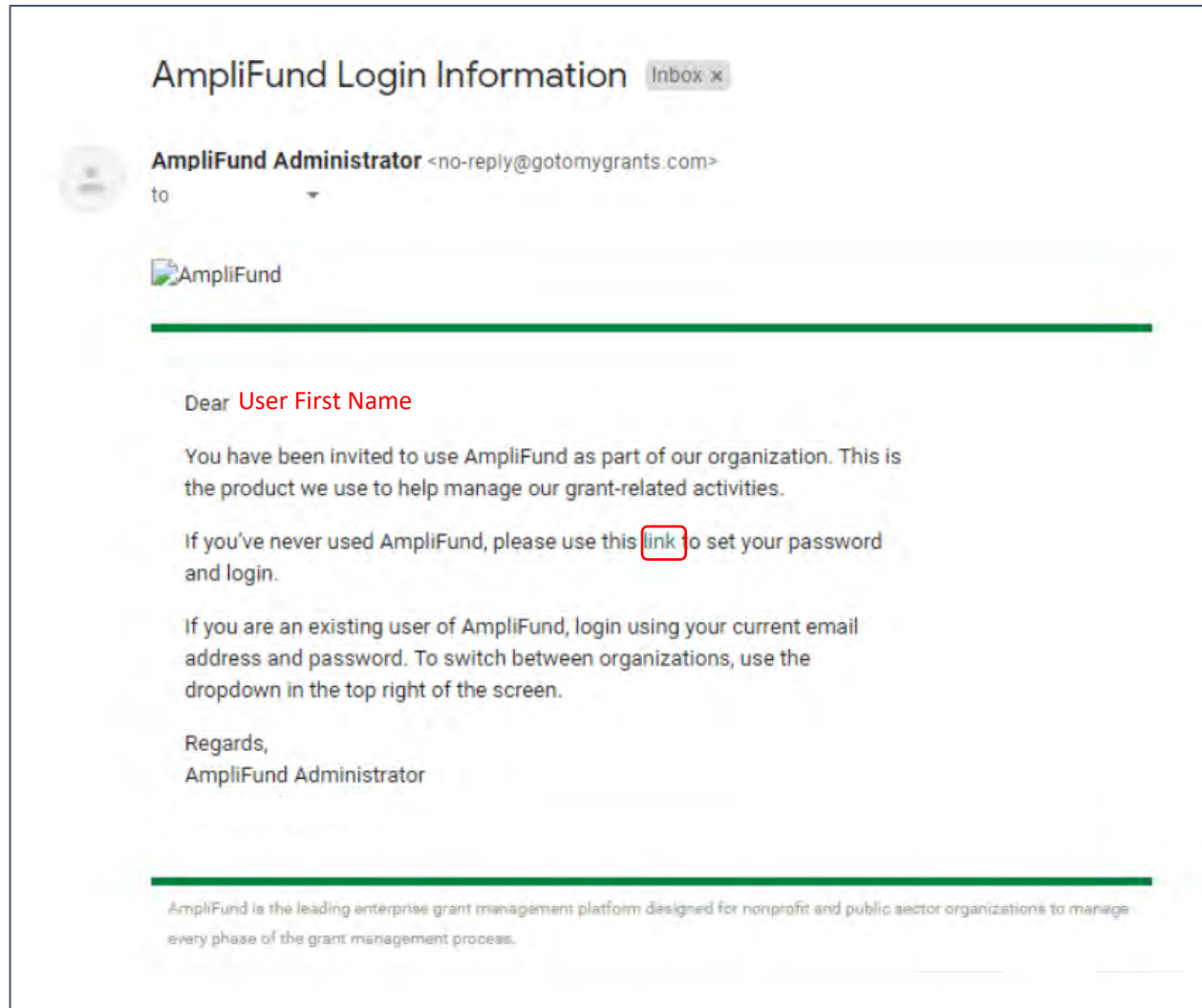
- Share information with JWB

## Ongoing Support

- Access to support site and customer service



# Welcome to AmpliFund



- AmpliFund generated emails from [no-reply@gotomygrants.com](mailto:no-reply@gotomygrants.com)
- If you do not receive your welcome email, check your spam folder
- Links in AmpliFund emails expire in 72 hours; contact AmpliFund Support if you need to have your email resent

# Creating a Password & Logging In

1. Click the **link** in the invitation email
2. Enter and confirm a password
3. Click the **Submit** button
4. Enter email and password in the Login window and click the **Login** button
5. Click the **I Accept** button to accept the AmpliFund terms of use

**Terms and Conditions**

**CLICK-TO-PROCEED AGREEMENT**

THIS CLICK-TO-PROCEED AGREEMENT describes the terms according to which, and conditions subject to which, StreamLink Software Inc., a Delaware corporation, will grant to each User the right to use StreamLink Software cloud-based grant and board management software services (the "Services"). Capitalized terms used in this Click-To-Proceed Agreement are defined in Section 9 and the "you" referred to herein is the User entering into this Agreement with StreamLink Software.

You may not click "[I ACCEPT]" unless you intend to enter into a legally binding and enforceable contract with StreamLink Software. If you do not intend to be so bound, you should click "[I DO NOT ACCEPT]".

In consideration of these premises, and the representations, warranties and covenants set forth in this Agreement, and for other good and valuable consideration, the receipt and sufficiency of which you acknowledge by clicking "[I ACCEPT]", you hereby agree with StreamLink Software as to that set forth below.

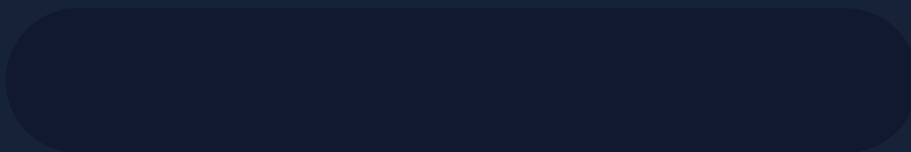
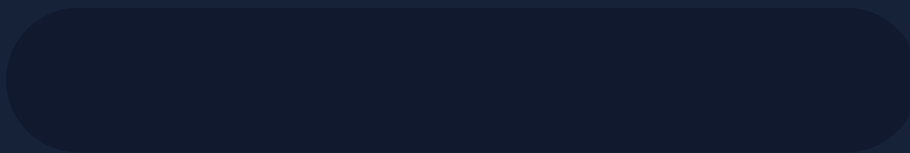
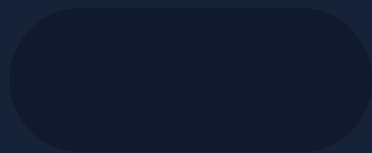
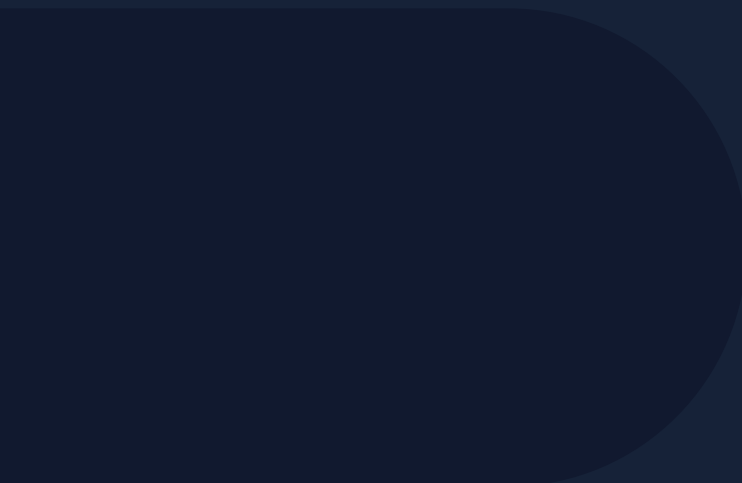
**1 Basic Terms**

1.1 The Services are always evolving and the form and nature of the Services may change from time to time without prior notice to you. In addition, StreamLink Software may stop (permanently or temporarily) providing the Services (or any features within the Services) to you or to users generally and may not be able to provide you with prior notice. We also retain the right to create limits on use and storage at our sole discretion at any time without prior notice to you.

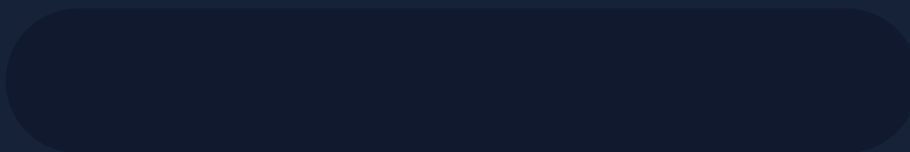
1.2 The Services may include advertisements, which may be targeted to the content or information on the Services, queries made through the Services, or other information. The types and extent of advertising on the Services are subject to change. In consideration for StreamLink Software granting you access to and use of the Services, you agree that StreamLink Software, third party providers and partners may place such advertising on the Services or in connection with the display of content or information from the Services whether submitted by you or others.

1.3 You may use the Services only if you can form a binding contract with StreamLink Software and are not a person barred from accessing the Services under the laws of the United States or other applicable jurisdiction. If you are under 18 years of age you may not access or use the Services for any reason.

# In-Product Review



*AmpliFund*



Support



# JWB Support Resources

**JWB Provider Software Support Email:**

[Provider-support@jwbpinellas.org](mailto:Provider-support@jwbpinellas.org)

**JWB Provider Software Support Website:**

<https://www.jwbpinellas.org/providers/>

# AmpliFund Support

## Submit a support ticket:

[support@amplifund.zendesk.com](mailto:support@amplifund.zendesk.com)

## Visit the support portal:

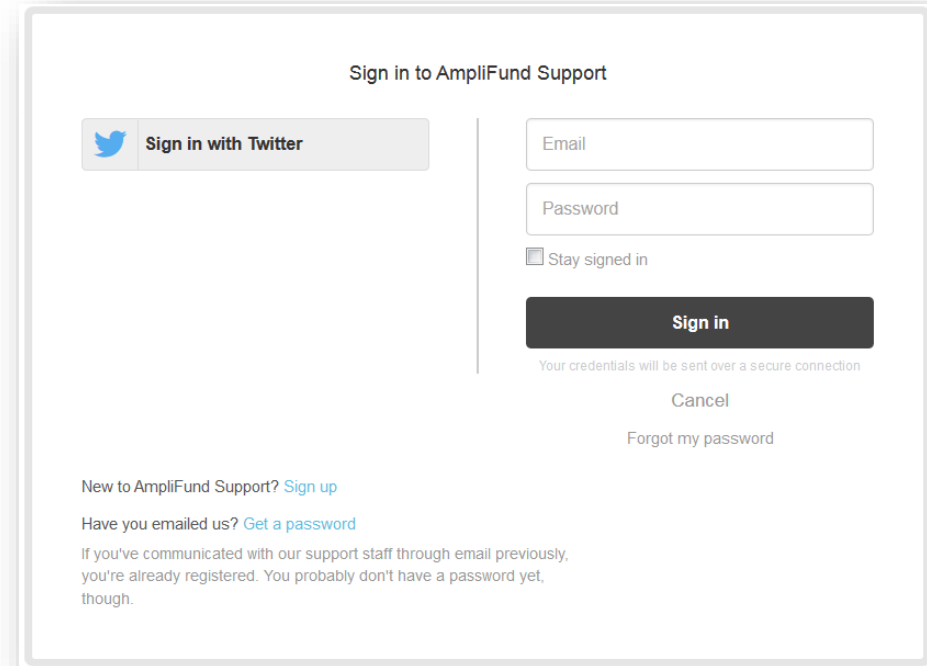
<https://amplifund.zendesk.com>

## Supported Browsers:


- Google Chrome (current supported releases)
- Mozilla Firefox (current supported releases)
- Microsoft Edge (current supported releases)
- Microsoft IE 11 +
- Apple Safari 10+

# AmpliFund Support Site

1. Go to <https://amplifund.zendesk.com>
2. Click the **Sign up** link
3. Enter your **full name**
4. Enter your **email address**
5. Complete the **I'm not a robot** check
6. Click the **Sign up** button
7. A welcome email from [support@zendesk.com](mailto:support@zendesk.com) will be sent to you via email
8. Click the link to set your password



Sign in to AmpliFund Support

 Sign in with Twitter

Email

Password

Stay signed in

**Sign in**

Your credentials will be sent over a secure connection

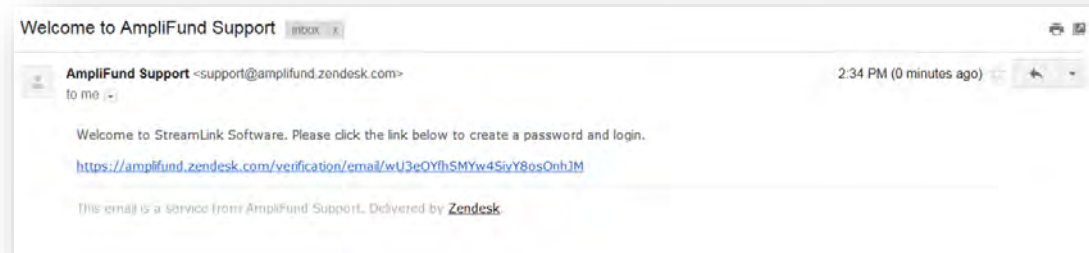
Cancel

[Forgot my password](#)

New to AmpliFund Support? [Sign up](#)

Have you emailed us? [Get a password](#)

If you've communicated with our support staff through email previously, you're already registered. You probably don't have a password yet, though.



# AmpliFund Support Site



**AmpliFund**

Have a question about AmpliFund? Search our support site.

- Release Notes**  
Weekly announcement of enhancements, updates, and fixes in AmpliFund
- User Guides**  
AmpliFund User Guides and Quickstart Guides for download
- Instructions**  
Step-by-step instructions on using AmpliFund's features
- Upcoming Training and Videos**  
Live training events and videos on how to use AmpliFund
- Import Templates**  
Excel templates for importing data into AmpliFund
- FAQs**  
Frequently Asked Questions about using AmpliFund
- Submit a Ticket**  
Still need help? Submit a request to our help desk.

# Thank You

[www.gotomygrants.com](http://www.gotomygrants.com)

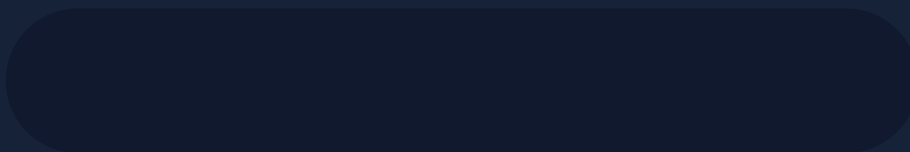
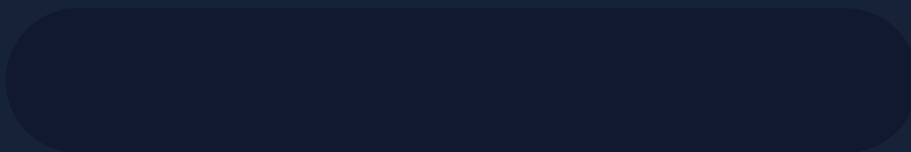
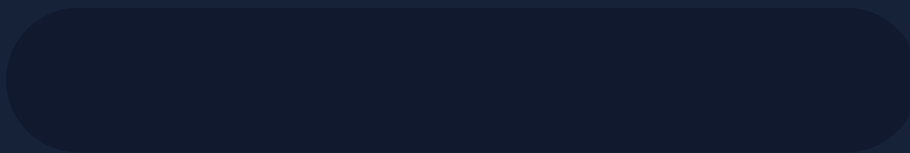
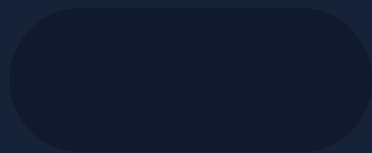
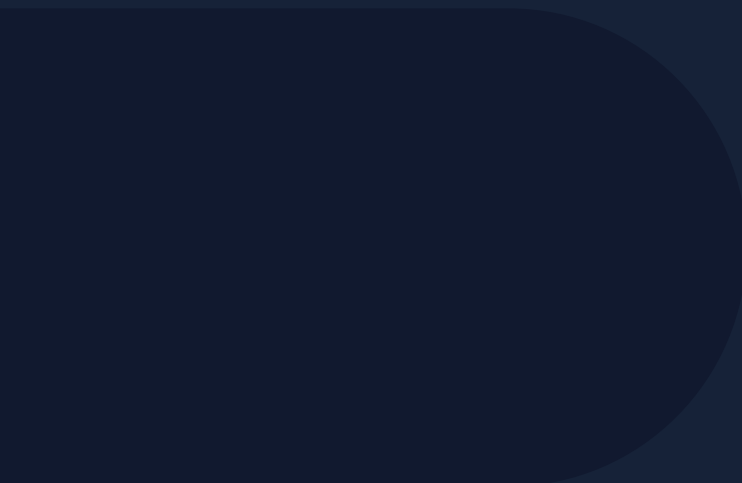
# Appendix

Support Slides

# Navigating AmpliFund

The screenshot displays the AmpliFund application interface. At the top, a green header bar contains the AmpliFund logo on the left and the user name 'Joe Test Applicant' on the right, with a dropdown arrow. Below the header is a navigation menu on the left, featuring icons and labels for 'Activity', 'Contacts', 'Grant Management', 'Reports', 'Documents', and 'Administration'. A red box highlights this menu, with a callout '1' next to it. The main content area shows a calendar for August 2020. The calendar has a legend at the top with 'Past Due' (red), 'Complete' (grey), and 'Due' (green). The calendar grid shows dates from Sunday to Saturday. A yellow highlight is on Friday, August 7th. On the right side of the calendar, there are two green boxes: 'Budgeting Tracking Period Due' and 'Performance Tracking Period Du'. A callout '2' points to the user name 'Joe Test Applicant' in the top right. A callout '3' points to an options toolbar in the top right corner, which contains icons for home, search, and other functions.

1. **Left Navigation** -shows on every page
2. **User Navigation** –includes account information, change password, message center, support, terms and conditions, applicant portal, and logout
3. **Options Toolbar** –displays icons to perform functions available on the current page, icons vary based on page

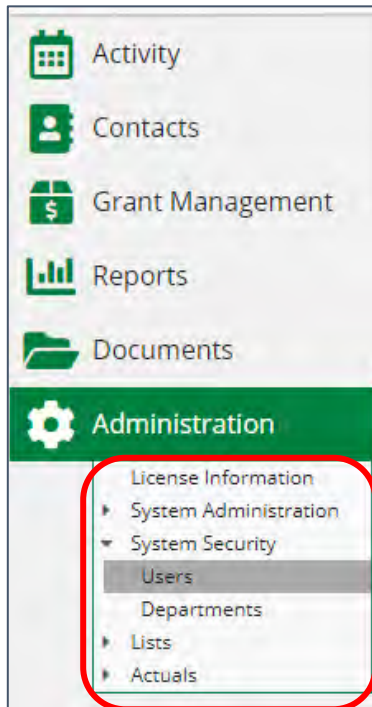


# Adding Users

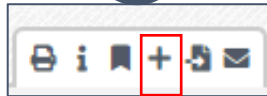


# Creating Additional Users

1



2



3

### Create User

**User Information**

Subscribe to Daily Emails

Subscribe to Weekly Emails

Applicant Portal Access

Role\*

**Staff Information**

First Name\*

Last Name\*

Title

Supervisor

Track Time\*

**Primary Address**

Address Line 1

Address Line 2

City

State

Zip Code

1. Open Administration > System Security > Users
2. Click the + icon in the top right hand corner to create a User
3. Enter user preferences & information
  - Select the User's Email Preference
  - User role
  - User's First Name, Last Name, and E-Mail Address
4. Click the 'Create' button

# User Options

## Subscribe to Daily/Weekly Emails

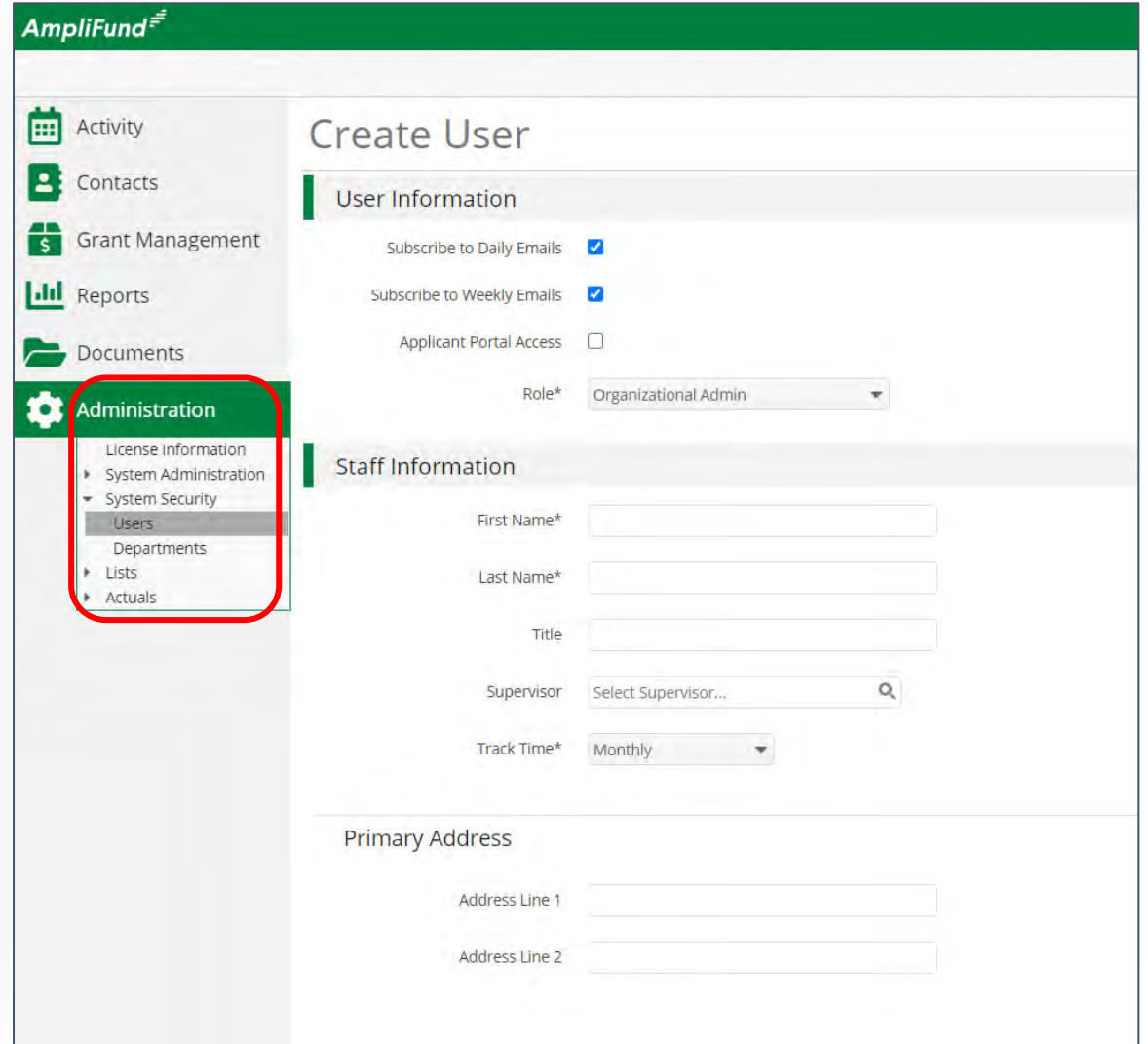
- Set to Yes to receive daily and/or weekly emails from AmpliFund with tasks/reminders

## Applicant Portal Access

- Set to **Yes** to provide a user in your organization with access to submit applications

## Role\*

- **Organization Administrator**
  - Full view and edit access to your organization's AmpliFund account
- **Executive**
  - View only access to your organization's AmpliFund account
- **Department User (No Salary)**
  - Only has access to budget or performance plan items to which you assign the user as the Responsible Individual
- **Department User (Salary)**
  - Has access to budget or performance plan items to which you assign the user as the Responsible Individual including personnel line items



**AmpliFund**

Activity  
Contacts  
Grant Management  
Reports  
Documents  
**Administration**  
License Information  
System Administration  
System Security  
**Users**  
Departments  
Lists  
Actuals

## Create User

### User Information

Subscribe to Daily Emails

Subscribe to Weekly Emails

Applicant Portal Access

Role\* Organizational Admin

### Staff Information

First Name\*

Last Name\*

Title

Supervisor

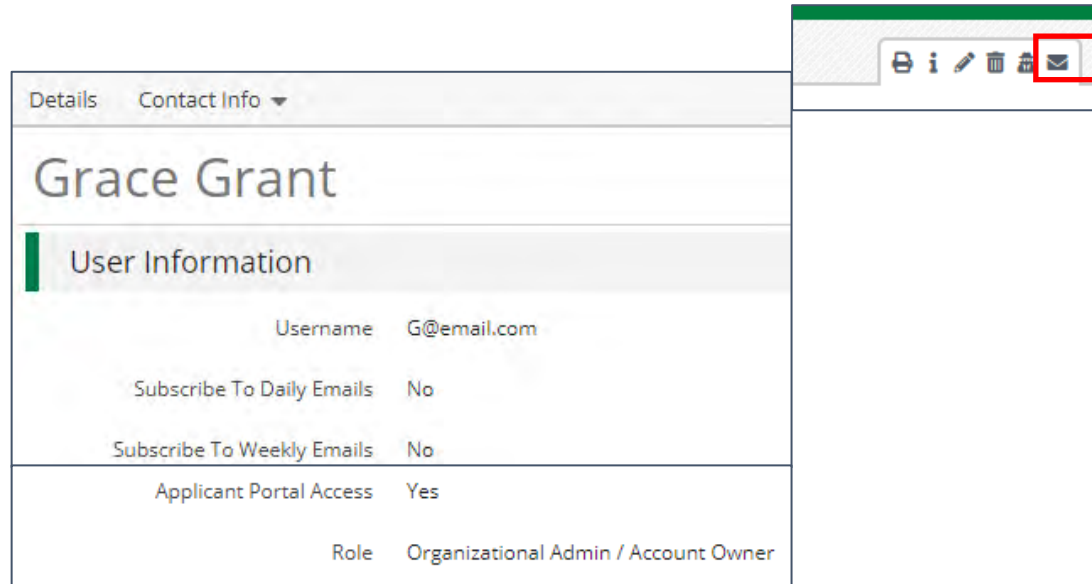
Track Time\* Monthly

### Primary Address

Address Line 1

Address Line 2

# Sending an Invitation to a User



The screenshot shows a user profile for 'Grace Grant'. The profile includes a 'User Information' section with the following details:

Username	G@email.com
Subscribe To Daily Emails	No
Subscribe To Weekly Emails	No
Applicant Portal Access	Yes
Role	Organizational Admin / Account Owner

At the top right of the profile card, there is an 'Icon Bar' containing several icons: a lock, an information icon, a pencil, a trash can, a refresh icon, and an envelope icon. The envelope icon is highlighted with a red square, indicating it is the 'Send Invitation' icon mentioned in the instructions.

1. Click the  in the *Icon Bar*
2. In the confirmation pop-up window, click **Send Invitation**

*Link is active for 72 hours*

Note: An Organization Administrator can resend the invitation email to a user by going to **Administration > System Security > Users**. Click the envelope icon next to the User's name and confirm.

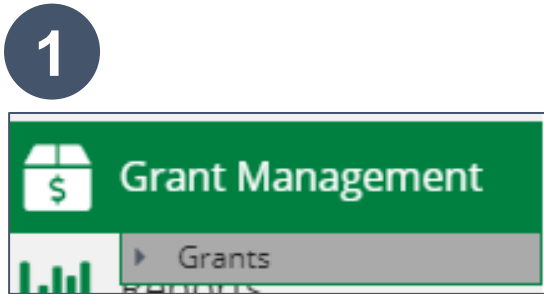


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Updating Grant Award

# Updating Grant Award Details

1. Go to **Grant Management > Grants**
2. Click the **'pencil' icon** next to grant name to edit
3. Update the Recipient Grant Manager name & add Recipient award name (optional)
4. Click the **Save** button in the right corner of the screen



2

Analytics						
Drag a column header and drop it here to group by that column						
Name	Grantor	Award Status	Total Awarded Amount	Fiscal Year Received	Close Out Date	Status
FY21 Example Award	Juvenile Welfare Board of Pinellas County	Approved	\$1.00		3/30/2022	Enabled

3

### FY21 Example Award – Award Details

**Award Status**

Name: FY21 Example Award

Recipient Name: Example Recipient

Recipient Award Name: FY21 Example Award

Award Status: Approved

Grant-Funded Amount ⓘ: \$1.00

Match Requirement ⓘ: \$1.00

**Total Budget ⓘ: \$2.00**

Expenses To Date ⓘ: \$0.00

Match Contributions To Date ⓘ: \$0.00

Invoiced To Date ⓘ: \$0.00

Pending Invoices ⓘ: \$0.00

Approved Invoices ⓘ: \$0.00

Cash Received To Date ⓘ: \$0.00

Remaining Available Grant-Funded Amount ⓘ: \$1.00

Remaining Match Requirement ⓘ: \$1.00

**Remaining Available Budget ⓘ: \$2.00**



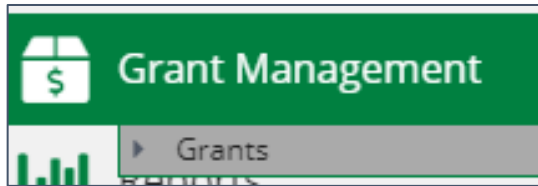
*AmpliFund*

Accessing Budget

# Accessing Budget

1. Go to **Grant Management > Grants**
2. Click the grant name
3. Click on **Post Award>Financial>Budget**

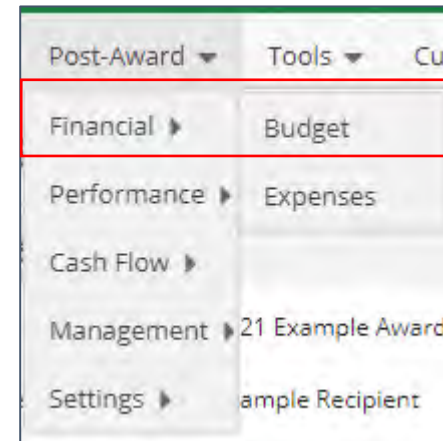
1



2

Analytics							
Drag a column header and drop it here to group by that column							
Name	Grantor	Award Status	Total Awarded Amount	Fiscal Year Received	Close Out Date	Status	
FY21 Example Award	Juvenile Welfare Board of Pinellas County	Approved	\$1.00		3/30/2022	Enabled	

3



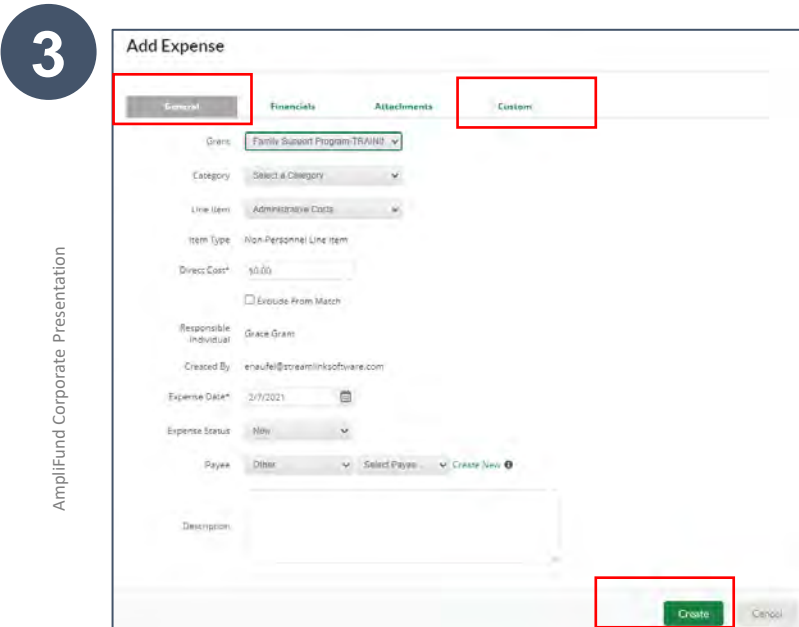
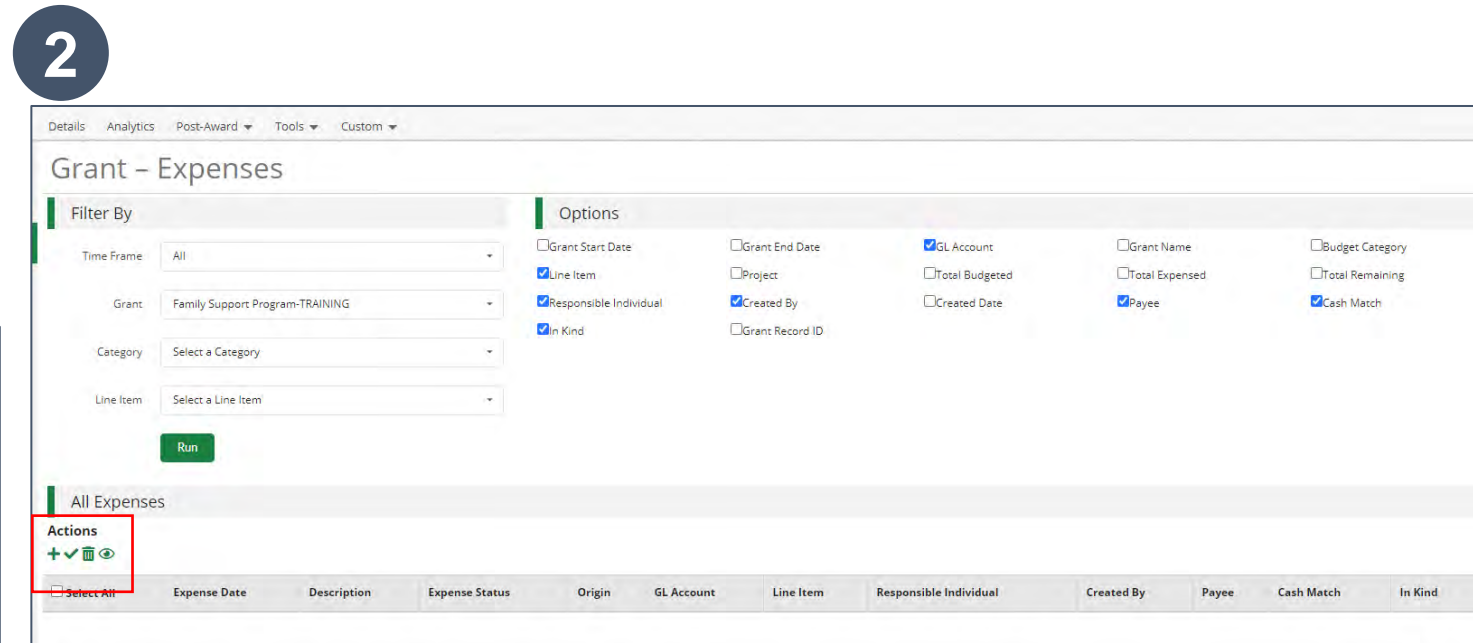
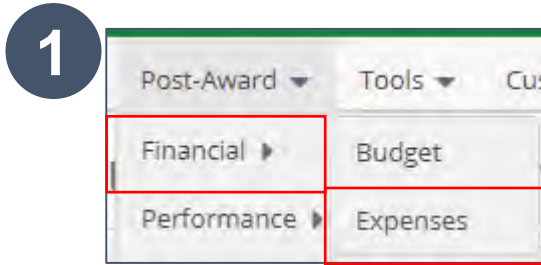
The logo for AmpliFund, featuring the word "AmpliFund" in a white, sans-serif font. To the right of the text is a small icon consisting of four vertical bars of increasing height, resembling a bar chart or signal strength indicator.

Expense Entry



# Expense Entry

1. From the Grant click on Post Award>Financial> Expenses
2. Click on the plus icon to add a new expense
3. Add expense information under expense tab and check information under Custom tab then click Create

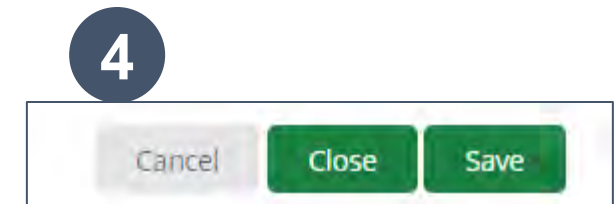
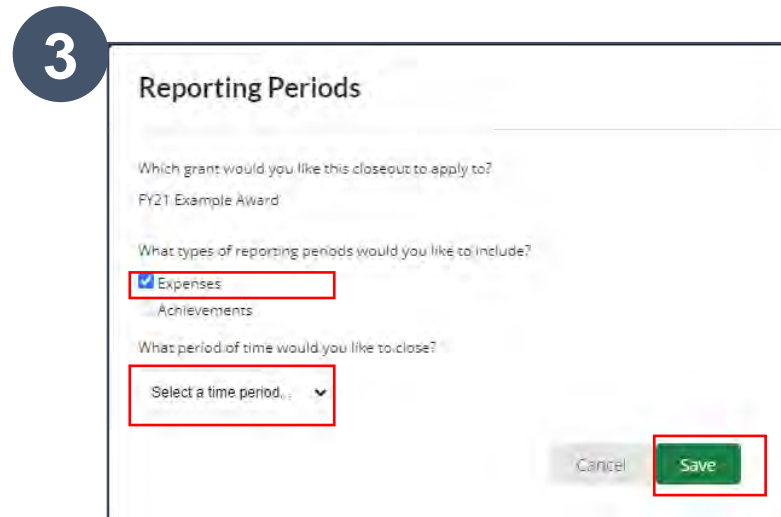
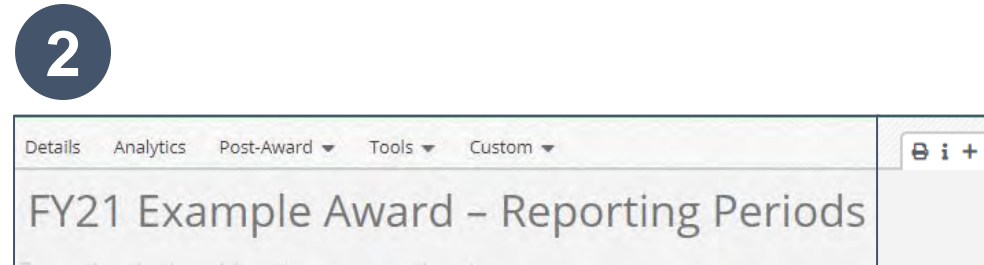
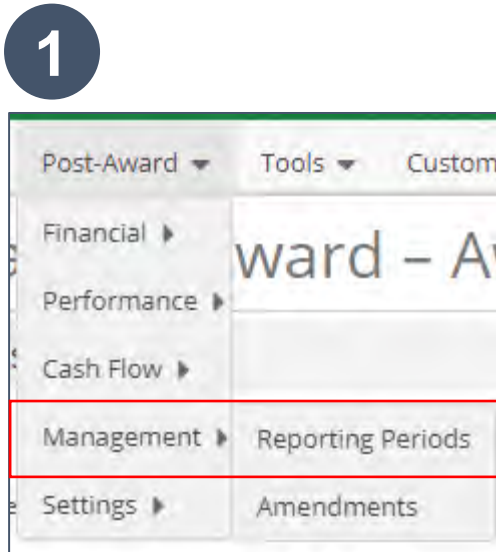


The logo for AmpliFund, featuring the company name in a white, sans-serif font with a small green icon of three vertical bars of increasing height to the right.

# Submitting a Reporting Period & Payment Request

# Generating a Reporting Period

1. From the Grant click on Post Award>Management>Reporting Periods
2. Click on the plus icon in the upper right hand corner
3. Select Expenses and Time Period then click Save
4. Review expenses & details, click Close to send completed reporting period to JWB



# Generating a Payment Request from Reporting Period

1. From the Reporting Periods click on the payment request icon
2. Enter name and date created
3. Type in total requested amount
4. Add any additional comments & upload files to JWB
5. Click submit to send to JWB


1

Drag a column header and drop it here to group by that column			
Reporting Period Start Date	Reporting Period End Date	Reporting Period Type	Status
2/1/2020	 2/29/2020	Budget	Closed

2

**Payment Request Information**

Payment Request Name\* February 2021

Date Created\* 3/5/2021 

Related Reporting Period(s) Period ending 2/29/2020

Payment Type Reimbursement

Payment Request Status Not Submitted

3

**Totals**

Net Total \$17,900.00

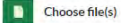
Requested Amount\* \$17,900.00

Remaining Grant Balance \$649,700.00

4

**Additional Information**

Comments

Upload File(s) 

5

Create **Submit** Cancel

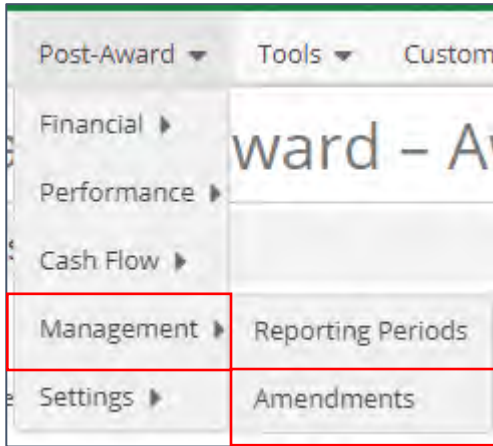
The logo for AmpliFund, featuring the word "AmpliFund" in a white, sans-serif font. To the right of the text is a small icon consisting of four vertical bars of increasing height, resembling a signal strength indicator or a bar chart. The logo is positioned on a dark blue background with several rounded rectangular shapes in various shades of blue and green.

# Submitting an Amendment Request

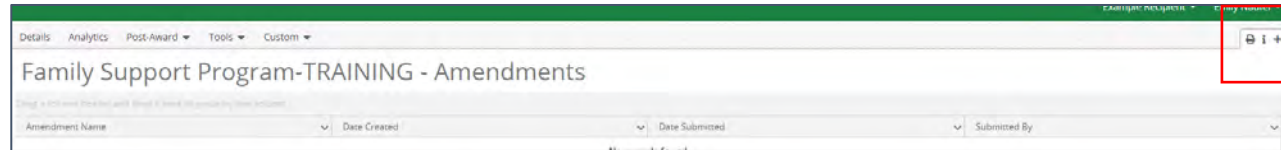
# Generating an Amendment

1. From the Grant click on Post Award>Management>Amendments
2. Click on the plus icon in the upper right hand corner
3. Click on circle then text of amendment type
4. Enter amendment Information
5. Click **Submit** to Submit request to JWB

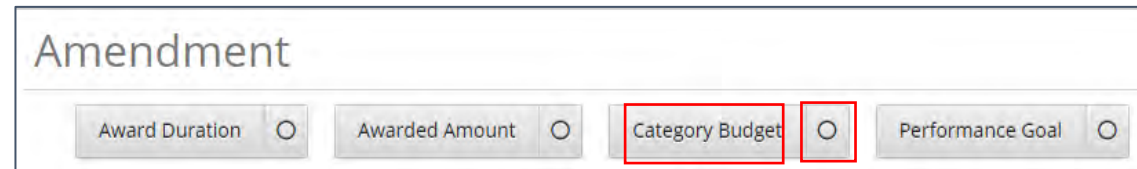
1



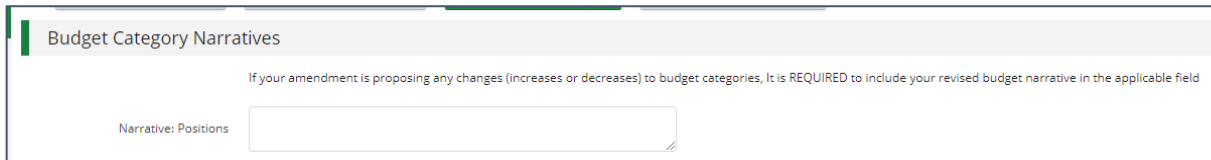
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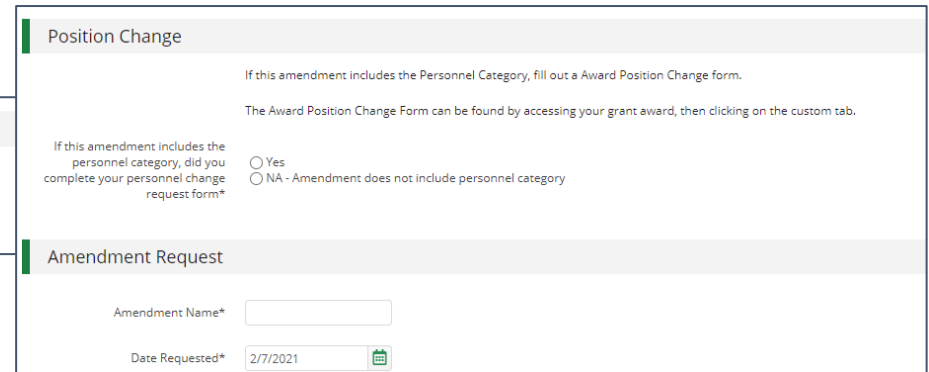
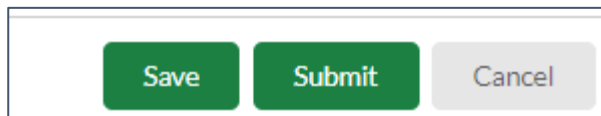
3



4



5



The logo for AmpliFund, featuring the word "AmpliFund" in a white, sans-serif font. To the right of the text is a small icon consisting of three horizontal lines of varying lengths, with a small square at the end of the top line, resembling a signal or data indicator.

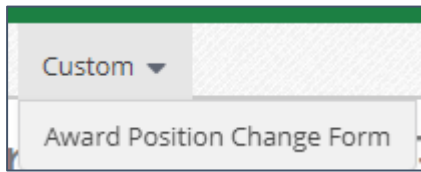
*AmpliFund*

# Award Position Change Form & Other Program Funding Form

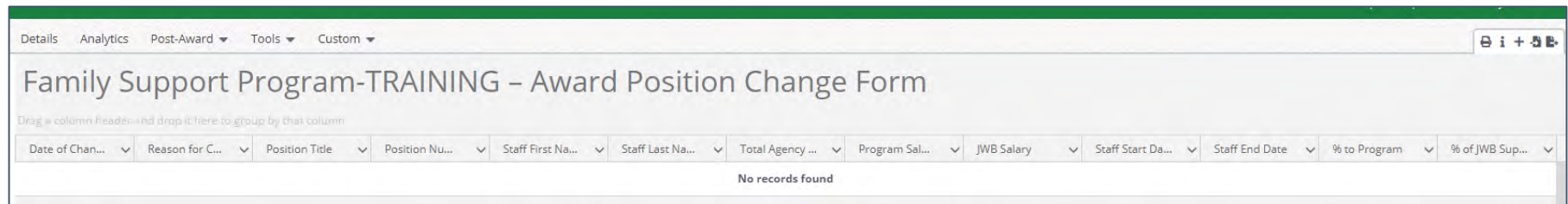
# Award Position Change Form & Other Program Funding Form

1. From the Grant click on Custom>Award Position Change form OR Other Program Funding Form
2. Click on the plus icon in the upper right hand corner
3. After information is entered click Create (bottom right hand corner)

1

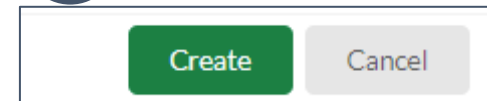


2



A screenshot of a web application interface. At the top, there are navigation tabs: 'Details', 'Analytics', 'Post-Award', 'Tools', and 'Custom'. Below the tabs is a header area with the title 'Family Support Program-TRAINING - Award Position Change Form'. Underneath the title is a table with several columns, each with a dropdown arrow. The columns are: 'Date of Chan...', 'Reason for C...', 'Position Title', 'Position Nu...', 'Staff First Na...', 'Staff Last Na...', 'Total Agency ...', 'Program Sal...', 'JWB Salary', 'Staff Start Da...', 'Staff End Date', '% to Program', and '% of JWB Sup...'. Below the table, the text 'No records found' is displayed.

3



A screenshot of two buttons. The first button is green with the text 'Create' in white. The second button is light gray with the text 'Cancel' in gray.

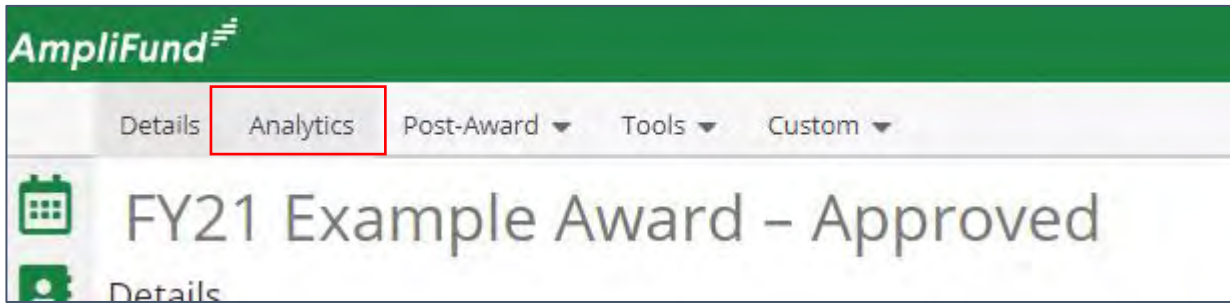


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Available Reporting

# Available Reporting

## Grant Dashboard



## Other Reports

