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# ***Grant Management User Guide***

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








# ***Grant Management Overview***

The *Grant Management* module is available to all Euna Grants users and allows users to view, create, edit, and delete grant records, including awarded grants (for clients with *Lead Recipient Licenses*) and sub-awards (for clients with *Sub-Recipient Licenses*). The module contains All Grants, Pending Grants, Active Grants, Denied Grants, Canceled Grants, Closed Grants, Completed Grants, and Deleted/Disabled Grants; Grants Awarded; and Sub-Awards.

Each grant record contains the grant's details, analytics, tools, workflow (for clients with *Workflow*), and pre-award and post-award information, including budget, performance, cash flow, reporting periods, and amendments, as well as grant opportunities and sub-awards.

This guide covers grant management functionality for standalone clients, as well as funders and recipients.

## Icons

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	Delete
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	Restore

# Grants

Grants includes all grants that an organization has begun to apply for, applied for, received, or been denied. Grants may be accessed from lists organized by award status within the Grant Management module. Grant lists include All Grants, Pending Grants (*Pending, Internal Review, or To Be Submitted* status), Active Grants (*Approved or Extended* status), Denied Grants, Canceled Grants, Closed Grants, Completed Grants, Deleted/Disabled Grants, Grants Awarded (grants that have been awarded to recipient organizations), and Sub-Awards. For more information on grants awarded, see the [Award Management Guide](#).

The Grants list shows the *Name, Grantor, Award Status, Total Awarded Amount, Fiscal Year Received, Close Out Date, and Status* columns by default. In addition, there are many additional columns available. Each of these columns may be shown or hidden, sorted, or filtered.

See the [Euna Grants User Interface Navigation Guide](#) to learn more about sorting and filter on grid views.

## Grant Security

Users will have visibility and editing permissions on grants based on their user security role. For more information on Euna Grants security roles, see [Security Roles](#).

Organizational Admin	Organizational Admin have the highest level of security and can create, view, and edit all records in the account, including Staff compensation information.
Executive	Executives can view all records in the account, including Staff compensation information, but cannot add or edit any records.
Department Admin	Department Admin can create, view, and edit all grant records linked to their department(s).
Department Users	Department Users can add achievements and expenses that are assigned to them. In addition, they can view all grant records linked to their department(s). Department Users are classified as Salary or No Salary. Department Users (No Salary) cannot create, view, or edit personnel line items on a grant's budget.
Project Admin	Project Admin can view all grants related to their projects.
Project Users	Project Users can add achievements and expenses assigned to them and can view any grants linked to their projects. Project Users are classified as Salary or No Salary. Project Users (No Salary) cannot create, view, or edit personnel line items on a grant's budget.
Fund Admin	Fund Admin do not have access to grants unless assigned as a Grant Writer, Grant Manager, or Additional Staff.
Fund Users	Fund Users do not have access to grants unless assigned as a Grant Writer, Grant Manager, or Additional Staff. Fund Users are classified as Salary or No

Salary. If assigned to a grant, Fund Users (No Salary) cannot create, view, or edit personnel line items on a grant's budget.

In addition to Euna Grants's user security roles, users can have additional security permissions per grant, based on their affiliation to the grant. Users can be selected as Grant Writers, Grant Managers, Additional Staff, Responsible Individuals. These users will be able to view the grant, regardless of their user type.

Grant Writers Grant Writers can view grant details, performance plans, and budget plans. They cannot create, edit, or delete grant details, goals, or line items.

Grant Managers Grant Managers have full access to edit grant details, and create, edit, and delete all items related to their grant. These users may also assign responsibility for goals and line items to other users.

Additional Staff Additional Staff can view grant details, performance plans, and budget plans. They cannot create, edit, or delete grant details, goals, or line items.

Responsible Individuals Responsible Individuals are responsible for overseeing a performance goal or line item's completion. They can only view their assigned goal or line item and their related achievements or expenses, respectively.

## How To View Overall Grant Dashboard

The Overall Grant Dashboard shows information for all grants that the user has access to, based on the user's security. The Overall Grant Dashboard can be viewed from any list page under *Grant Management>Grants*. The dashboard will show information based on the list page, i.e. data for all pending grants on *Grant Management>Grants>Pending Grants*.

For more information on Euna Grants dashboards and analytics, see the [Euna Grants Dashboards Guide](#).

1. Open **Grant Management>Grants**.
2. Open a **grant list**.
3. Open the **Analytics tab**.

## How To View an Individual Grant Dashboard

The individual grant dashboard shows information for a single grant. The dashboard shows the Grant Manager, risk, and important dates. The Overall Grant Dashboard can be viewed from *Grant Management>Grants>All Grants>grant name*.

For more information on Euna Grants dashboards and analytics, see the [Euna Grants Dashboards Guide](#).

1. Open **Grant Management>Grants>All Grants**.

2. Click a **grant name**.
3. Open the **Analytics tab**.

## How To Add a Grant

Prerequisite: Must be an Organizational Administrator or Department Admin

### Note

Depending on your account settings, this record type may have additional custom fields or sections.

1. Open **Grant Management>Grants>All Grants**.
2. Click the **+** (**Create icon**) in the *Icon Bar*.

### Grant Information

3. Add a grant **Name**.
4. Select the **Grantor**. This list pulls from *Contacts>Organizations*.
5. Select **Award Type**.
6. Select **Award Status**.
7. If Award Status is *Denied*, add **Denied Date**.
8. Select associated **Fund Activity Categories** (optional). This list pulls from *Administration>Lists>Fund Activity Categories*.
9. Select associated **Department(s)** (optional). This list pulls from *Administration>System Security>Departments*.
10. Select associated **Subject(s)** (optional). This list pulls from *Administration>Lists>Subjects*.

### Pre-Award Information

11. Add the **RFP ID Number** (Request For Proposal Identification Number), **Funding Opportunity Number**, and/or **Assistance Listings Number** (formerly CFDA Number) (optional).
12. Select if the funder requires a **Letter of Intent**.
  - a. If *Yes*, select a **Letter of Intent Due Date**.
13. Select the **Proposal Open Date** and **Proposal Close Date** (optional). These are the dates when the funder starts and stops accepting applications, respectively.
14. Select the **Proposal Submitted Date** (optional).
15. Select the **Projected Receipt Date**. This is the expected date of award notification/receipt. This date must be added in order to calculate submission performance and budget plan allocations.
16. Add **Proposed Length of Award** in full years and additional months.
17. Select **Grant Writer(s)** (optional). This list pulls from *Contacts>Staff*. Grant Writers may view grant details, performance plans, and budget plans. They cannot create, edit, or delete grant details, goals, or line items.
18. Select **Additional Staff** (optional). This list pulls from *Contacts>Staff*. Additional Staff may view grant details, performance plans, and budget

plans. They cannot create, edit, or delete grant details, goals, or line items.

19. Select **Project(s)** that will be associated with the grant (optional). For clients with *Project Management*, this list pulls from *Project Management>Projects*. For more information on projects, see the [Euna Grants Project Management Guide](#).
20. Add **Description, Award Details, Eligibility Requirements, and Additional Information** (optional).

## Pre-Award Budget

21. Add the **Requested Amount, Cash Match Requirement, In-Kind Match Requirement, or Other Funding Requirement** (optional). These will calculate the *Total Projected Budget*.

## Post-Award Information

22. Select a **Grant Manager**. This list pulls from *Contacts>Staff*. Grant Managers have full access to edit grant details, and create, edit, and delete all items related to their grant. These users may also assign responsibility for goals and line items to other users.
23. Select the **Awarded Date**.
24. Select the award **Start Date, Grant Year 1 End Date** (which is the end date for first grant year, for reporting purposes) **End Date, and Close Out Date** (optional).
25. If Award Status is *Extended*, add **Extension Approved Date** and the new **Extended End Date**.
26. Add the **Activity Code, Federal Agency and Organizational Element, Identifying Number Assigned by Federal Agency, and/or Recipient Account Number** (optional).

## Post-Award Budget

27. Add **Awarded Amount, Cash Match Amount, In-Kind Match Amount, or Other Funding Amount** (optional). These will calculate the *Total Budget*.


## Record Information

28. Add a **Unique Identifier** (optional).
29. Select the grant record **Status**.
30. Click **Create**.

## How To Edit a Grant

Prerequisite: Must be Organizational Administrator, Department Admin, or Grant Manager


1. Open **Grant Management>Grants>All Grants**.
2. Click the **grant name**.

3. Click the  (**Edit icon**) in the Icon Bar.
4. Update the information as necessary.
5. Click **Update**.

## How To Copy a Grant

Copying a grant provides a quick method for pulling over all existing grant information into a new grant record. When a grant is copied, all information from the grant details pulls into the new grant record. Once copied, any grant-related information may be updated or deleted as needed.

Prerequisite: Must be an Organizational Administrator or Department Admin

1. Open **Grant Management>Grants>All Grants**.
2. Click the **grant name**.
3. Click the  (**Copy icon**) in the Icon Bar.
4. Update information as necessary.
5. Click **Copy**.


### Note

Deleting a grant will also delete its sub-awards.

## How To Delete a Grant

Deleting a grant removes the grant from the Grants lists, but does not completely remove the record from Euna Grants. Once deleted, the grant moves to the Deleted/Disabled Grants list. To completely remove the grant from Euna Grants, see [How To Purge a Grant](#).


Prerequisite: Must be an Organizational Administrator or Department Admin

1. Open **Grant Management>Grants>All Grants**.
2. Click the **grant name**.
3. Click the  (**Delete icon**) in the Icon Bar.
4. In the confirmation pop-up window, click **Delete**.

## How To Purge a Grant

To permanently and completely remove the grant from Euna Grants, it must be purged from the Deleted/Disabled Grants list.

Prerequisite: Must be an Organizational Administrator or Department Admin

1. Open **Grant Management>Grants>Deleted/Disabled Grants**.
2. Click a **deleted grant name**.
3. Click the  (**Purge icon**) in the *Icon Bar*.




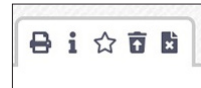
4. In the confirmation pop-up window, click **Purge**.

## How To Restore a Grant

Deleted grants can be restored from the Deleted/Disabled Grants list.

Prerequisite: Must be an Organizational Administrator or Department Admin

1. Open **Grant Management>Grants>Deleted/Disabled Grants**.
2. Click a **deleted grant name**.
3. Click the  (**Restore icon**) in the *Icon Bar*.




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

## How To Disable a Grant

Disabling grants removes the grant from grants lists. Disabled grants will not appear in reports.

Prerequisite: Must be an Organizational Administrator or Department Admin

1. Open **Grant Management>Grants>All Grants**.
2. Click the **grant name**.
3. Click the  (**Edit icon**) in the Icon Bar.

### Record Information

4. Select **Disabled** from the *Status* dropdown menu.

**Record Information**

Unique Identifier

Record Status Disabled ▾

5. Click **Update**.


## How To Import Grants

Users can import multiple grants using the [Grants Import Template](#) (recommended) or their own Excel file. The Grants Import Template includes the Name\*, Grantor\*, Award Type\*, Award Status\*, Denied Date, Grant Manager First Name\*, Grant Manager Last Name\*, Grant Writer(s), Department(s) or Program(s), Subjects, Additional Staff, Project(s), Description, Award Details, Eligibility Requirements, Additional Information, Unique Identifier, Status, RFP ID Number, Funding Opportunity Number, Assistance Listings Number, Letter of Intent Required\*, Letter of Intent Due Date, Proposal Open Date, Proposal Close Date, Proposal Submitted Date, Projected Receipt Date\*, Proposed Length of Award Years\*, Proposed Length of Award Months\*, Requested Amount, Cash Match Amount, In Kind Match Requirement, Other Funding Requirement,

### Note


The Grantor, Grant Writers, Additional Staff, and Grant Manager Names must **exactly match** what is in the *Contacts* module and the Department(s) and Subjects must **exactly match** what is in the *Administration* module.

Awarded Date\*, Extension Approved Date\*, Extended End Date\*, Start Date\*, Grant Year One End Date\*, End Date\*, Close Out Date, Activity Code (NAICS or NTEE-NPC), Federal Agency and Organizational Element, Identifying Number Assigned by Federal Agency, Recipient Account Number, Awarded Amount\*, Cash Match Amount, In Kind Match Amount, Other Funding Amount, and Financial Code fields. Required fields have asterisks (\*) next to their names.

1. Open **Grant Management>Grants>All Grants**.
2. Click the  (**Import icon**) in the *Icon Bar*.
3. In the pop-up window, select **Grant Import** from the *Choose Import* dropdown.
4. Click **Choose a file** to select a file from your computer.
5. Select the **Destination** field for each Source column. If you are using the [Grants Import Template](#) (recommended), the source and destination fields should match.
6. Click **Import**.

## How To Export the Grants List












Users can export the Grants list as a CSV or Excel file.

1. Open **Grant Management>Grants>All Grants**.
2. Click the  (**Export icon**) in the *Icon Bar*.
3. In the pop-up window, add a **File Name**.
4. Select the **Export Type**.
5. Click **Export**.

## ***Pre-Award***

The *Pre-Award tab* allows Organizational Administrators, Department Administrators, and Grant Managers to create performance plans and budgets for submission to grant opportunity applications. Upon award, these items can be seamlessly copied to the *Post-Award tab* for editing.

## Icons

-  Print
-  Help
-  Create/Add
-  Submission Performance Plan Report
-  Save Current View
-  Import
-  Edit
-  Copy
-  Delete
-  Spread Evenly
-  Clear

# Submission Performance Planning

Performance plans contain programmatic measurable items used to define the success of the overall grant. The performance plan consists of goals and overarching strategies that link goals together. Goals can be created by Organizational Administrators, Department Admin, and Grant Managers.

The Performance Plan list shows the *Name*, *Goal Type*, *Responsible Individual*, and *Strategy* columns by default. In addition, the following columns may be shown: *Status*, *Created By*, *Created Date*, *Modified By*, and *Modified Date*. Each of these columns may be shown or hidden, sorted, or filtered. See the [AmpliFund User Interface Navigation Guide Euna Grants User Interface Navigation Guide](#) to learn more.

## Goal Types

Goals are measurable activities planned to ensure grant deliverables are met on the grant's timeline. Each goal must have a Responsible Individual who will be responsible for tracking achievements against that goal. Euna Grants has six types of goals.

- Milestone Goal Milestone goals are the most basic goal type. They allow for tracking progress as a "Yes" or "No" response by the Responsible Individual. An example of a milestone goal is "Create and send Q1 Staff Survey."
- Narrative Goal Narrative goals are question and answer goals. Responsible Individuals may answer the question posed by the goal. An example of a narrative goal is "How successful was the grant-related activity this period?"
- Numeric Goal Numeric goals are a discrete number to achieve. As units of the goal are completed, Responsible Individuals may record units completed. An example of a numeric goal is "number of program participants" with a goal target of 50.
- Percent Achieved Goal Percent achieved goals are goals to reach a desired percent. When tracking progress against a percent achieved goal, Responsible Individuals 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%.
- 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, Responsible Individuals 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%.
- 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,

Responsible Individuals may enter Units Achieved. 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.

## ! Note

Depending on your account settings, this record type may have additional custom fields or sections.

## How To Add a Submission Performance Goal

When creating a new goal, the fields may vary depending on the goal type.

Prerequisite: Must be Organizational Administrator, Department Admin, or Grant Manager

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Performance Plan**.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. In the pop-up window, select a **Strategy** (optional). This will link the goal to an existing strategy.
6. Select a **Goal Type**. This could be [Milestone](#), [Narrative](#), [Numeric](#), [Percent Achieved](#), [Percent Changed](#), or [Reimbursement](#).
7. Add the goal information.
8. Click **Save**.

## How To Add a Submission Performance Milestone Goal

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Performance Plan**.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. In the pop-up window, select a **Strategy** (optional). This will link the goal to an existing strategy.
6. In the *Goal Type* dropdown, select **Milestone**.
7. Add the goal **Name**.
8. Add the goal **Description** (optional).
9. Select the **Responsible Individual**. This list pulls from *Contacts>Staff*. The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.

10. Select a goal **Due Date**.
11. Click **Save**.

## How To Add a Submission Performance **Narrative** Goal

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Performance Plan**.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. In the pop-up window, select a **Strategy** (optional). This will link the goal to an existing strategy.
6. In the *Goal Type* dropdown, select **Narrative**.
7. Add the goal **Name**.
8. Add the goal **Description** (optional).
9. Select the **Responsible Individual**. This list pulls from *Contacts>Staff*. The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.
10. Add the **Question** that the goal will answer.
11. Click **Save**.

## How To Add a Submission Performance **Numeric** Goal

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Performance Plan**.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. In the pop-up window, select a **Strategy** (optional). This will link the goal to an existing strategy.
6. In the *Goal Type* dropdown, select **Numeric**.
7. Add the goal **Name**.
8. Add the goal **Description** (optional).
9. Select the **Responsible Individual**. This list pulls from *Contacts>Staff*. The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.
10. Add the **Number To Be Achieved**.
11. Click **Save**.

## How To Add a Submission Performance **Percent Achieved** Goal

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Performance Plan**.
4. Click the **+** (**Create icon**) in the *Icon Bar*.
5. In the pop-up window, select a **Strategy** (optional). This will link the goal to an existing strategy.
6. In the *Goal Type* dropdown, select **Percent Achieved**.
7. Add the goal **Name**.
8. Add the goal **Description** (optional).
9. Select the **Responsible Individual**. This list pulls from *Contacts>Staff*. The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.
10. Add the **Percent Desired**.
11. Click **Save**.

## How To Add a Submission Performance **Percent Changed** Goal

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Performance Plan**.
4. Click the **+** (**Create icon**) in the *Icon Bar*.
5. In the pop-up window, select a **Strategy** (optional). This will link the goal to an existing strategy.
6. In the *Goal Type* dropdown, select **Percent Changed**.
7. Add the goal **Name**.
8. Add the goal **Description** (optional).
9. Select the **Responsible Individual**. This list pulls from *Contacts>Staff*. The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.
10. Add the **Current Percent** and **Percent Desired**.
11. Click **Save**.

## How To Add a Submission Performance **Reimbursement** Goal

1. Open **Grant Management>Grants>All Grants**.

2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Performance Plan**.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. In the pop-up window, select a **Strategy** (optional). This will link the goal to an existing strategy.
6. In the *Goal Type* dropdown, select **Reimbursement**.
7. Check the **Add as Budget Line Item checkbox** to add the goal to the grant's expense budget.
8. Add the goal **Name**.
9. Add the goal **Description** (optional).
10. Select the **Responsible Individual**. This list pulls from *Contacts>Staff*. The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.
11. Add the **Rate Per Achievement** in dollars.
12. Add the **Number To Be Achieved**.
13. Click **Save**.

**! Note**

If selected, any changes to the goal will be automatically reflected in the grant's budget.

## How To Add Allocations to a Submission Performance Goal

Narrative, Numeric, Percent Achieved, Percent Changed, and Reimbursement goals allow you to add allocations. Allocations help you plan your goals by year or month.

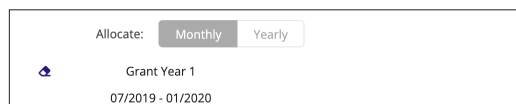
1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Performance Plan**.
4. Click the **✎ (Edit icon)** next to a goal name.
5. In the pop-up window, open the **Allocations tab**.



6. Select if you wish to view your allocations **Yearly** or **Monthly**.
7. Add **allocation amounts**. Click the **🗑 (Clear icon)** to remove all selections. Click the **↔ (Spread Evenly icon)** to spread amounts equally over the grant's months.

**! Note**


Numeric goals will spread whole numbers; any remainder will be added to the last month.



8. Click **Save**.

## How To Add an Attachment to a Submission Performance Goal

All goals allow you to add an attachment.

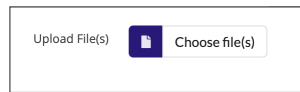
1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Performance Plan**.
4. Click the  (**Edit icon**) next to a goal name.

Name	Goal Type
Update disease prevention brochure  	Milestone

5. In the pop-up window, open the **Attachments tab**.



6. Click **Choose a file** to select a file from your computer.
7. Click the **(File icon)** to add additional files (optional).




8. Click **Save**.

### Note

Once a goal has been created with a specific goal type selected, the goal type cannot be changed.


## How To Edit a Submission Performance Goal

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Performance Plan**.
4. Click the  (**Edit icon**) next to a goal name.

Name	Goal Type
Update disease prevention brochure  	Milestone

5. Update the information as necessary.
6. Click **Save**.


## How To Copy a Submission Performance Goal

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Performance Plan**.
4. Click the  (**Copy icon**) next to a goal name.

Name	Goal Type
Update disease prevention brochure 	Milestone

5. Update the information as necessary.
6. Click **Save**.

## How To Delete a Submission Performance Goal

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Performance Plan**.
4. Click the  (**Delete icon**) next to a goal name.

Name	Goal Type
Update disease prevention brochure 	Milestone


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

## How To Import Submission Performance Goals

### Note

The Individual name must **exactly match** what is in *Contacts>Staff*.

Users can import multiple goals using the [Performance Plan Import Template Performance Plan Import Template](#) (recommended) or their own Excel file. The Performance Plan Import Template includes the Grant, Goal Unique ID, Goal Type\*, Name\*, Description, Individual\*, Question, Number To Be Achieved, Current Percentage, Desired Percentage, Rate Per Unit, Due Date, and Add as Budget Line Item fields. Required fields have asterisks (\*) next to their names.


1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award Tab>Submission Performance Plan**.
4. Click the  (**Import icon**) in the *Icon Bar*.
5. In the pop-up window, click **Choose a file** to select a file from your computer.
6. Select the **Destination** field for each Source column. If you are using the [Performance Plan Import Template Performance Plan Import Template](#) (recommended), the source and destination fields should match.
7. Click **Import**.

## How To Import Submission Performance Plans

### Note

The Individual name must **exactly match** what is in *Contacts>Staff*.

Users can import multiple performance plans using the [Performance Plan Import Template Performance Plan Import Template](#) (recommended) or their own Excel file. The Performance Plan Import Template includes the Grant, Goal Unique ID, Goal Type\*, Name\*, Description, Individual\*, Question, Number To Be Achieved, Current Percentage, Desired Percentage, Rate Per Unit, Due Date, and Add as Budget Line Item fields. Required fields have asterisks (\*) next to their names.

1. Open **Grant Management>Grants>All Grants**.
2. Click the  (**Import icon**) in the *Icon Bar*.
3. In the pop-up window, select **Performance Plan Import** from the *Choose Import* dropdown.
4. In the *Award Type* dropdown, select **Pre-Award**.
5. Select to *Identify Grant by* grant **ID** or **Unique Identifier**.
6. In the pop-up window, click **Choose a file** to select a file from your computer.
7. Select the **Destination** field for each Source column. If you are using the [Performance Plan Import Template Performance Plan Import Template](#) (recommended), the source and destination fields should match.
8. Click **Import**.

### Note

Depending on your account settings, this record type may have additional custom fields or sections.


## How To Add a Submission Performance Strategy

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Performance Strategies**.
4. Click the **+** (**Create icon**) in the *Icon Bar*.
5. In the pop-up window, add a strategy **Name**.
6. Add a **Description** (optional).
7. Click **Create**.

## How To Edit a Submission Performance Strategy

After strategies have been added, the name and description may be edited.

1. Open **Grant Management>Grants>All Grants**.


2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Performance Strategies**.
4. Click the  (**Edit icon**) next to a strategy name.



5. Update the information as necessary.
6. Click **Save**.

## How To Delete a Submission Performance Strategy


Prerequisite: Strategy cannot be linked to a performance goal

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Performance Strategies**.
4. Click the  (**Delete icon**) next to a strategy name.



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












## How To Link a Submission Performance Strategy to a Goal

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Performance Plan**.
4. Click the  (**Edit icon**) next to a goal name.



5. In the pop-up window, select a **Strategy** (optional). This will link the goal to an existing strategy.
6. Click **Save**.

## Icons

	Print
	Help
	Submission Budget Report
	Import
	Export
	Add
	Edit
	Delete
	Locked
	Spread Evenly
	Clear


# Submission Budget Planning

Submission budgets define the planned spend down of the overall grant and include planned expenses, revenue, and match. They can be created and edited by Organizational Admin, Department Admin, and the Grant Manager.

Budgets show the budget categories, grant-funded amounts, match amounts, total costs, and total revenue by default. Additionally, the grant years, line items, and Responsible Individuals can be shown or hidden.

Submission budget settings define a grant's default match and indirect cost rate, budget categories, and benefit types. The budget settings should be configured before adding budget categories or line items. In addition, budget settings can be set on the category or line item.

## How To Configure Submission Budget Settings

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Budget Settings**.
4. Click the  (**Edit icon**) in the *Icon Bar*.

## Matching

5. Select the default **Match** requirements. These can also be set on the category or line item.
  - **Disable:** match will not be tracked on budget categories or line items
  - **Enable:** match may be tracked on budget categories or line items
  - **Require:** cash match will always be tracked on budget categories and line items
6. Select **Use Match Percentage As**.
  - **Percentage of Total Grant Budget:** calculates match as percent of total budget, including grant-funded and match (i.e., 50% match of \$150,000 total budget = \$75,000)
  - **Percentage of Grant-Funded Amount:** calculates match as percent of grant-funded amount only (i.e., 50% match of \$150,000 total budget = \$50,000)
7. Select **Default Cash Match**. This is the amount or percent that will be inherited by budget categories and line items.
  - a. If *Percentage* is selected, add the **Cash Match Percent** (in decimal format).
  - b. If *Amount* is selected, add the **Cash Match Amount**.
8. Select **Default In-Kind Match Personnel**. This is the amount or percent

that will be inherited by personnel line items.

- a. If *Percentage* is selected, add the **In-Kind Match Personnel Percent** (in decimal format).
  - b. If *Amount* is selected, add the **In-Kind Match Personnel Amount**.
9. Select **Default In-Kind Match Non-Personnel**. This is the amount or percent that will be inherited by non-personnel line items.
- a. If *Percentage* is selected, add the **In-Kind Match Non-Personnel Percent** (in decimal format).
  - b. If *Amount* is selected, add the **In-Kind Match Non-Personnel Amount**.
10. Select **Default Other Funding**. This is the amount or percent that will be inherited by non-personnel line items.
- a. If *Percentage* is selected, add the **Other Funding Percent** (in decimal format).
  - b. If *Amount* is selected, add the **Other Funding Amount**.

## Indirect

11. Check the **Track Indirect Cost checkbox**. If checked, an indirect cost category will appear in the grant's Expense Budget which cannot be edited.

Track Indirect Cost

Grant Date Range 7/1/2020 to 6/30/2021

12. Select a **Rate Type**.
13. Add the **Indirect Rate** (in decimal format).
14. Select the **Start Date** and **End Date**.
15. Click the **+** (**Add icon**) to add additional indirect cost rates.

Type	Rate	Start Date	End Date
Provisional	20.00 %	7/1/2020	6/30/2021

Direct Cost  
 Grant-Funded Amount  
 System Generated  
 Manual Entry or Import

16. If Match is enabled, select the how indirect should be calculated on the *Calculate Indirect By* field.
- **Direct Cost:** Match is included when calculating indirect
  - **Grant-Funded Amount:** Match is excluded when calculating indirect

## Note

Depending your account settings, this section may not be available.

## Reconciliation Methods

17. Select from the available **Allowable Reconciliation Methods**.
- **Advance Payment:** Grant funds are given to recipient in advance as full lump sum

- **Working Capital:** Grant funds are given to recipient in a defined payment schedule which includes an initial advance
- **Reimbursement:** Recipient spends own money and then requests grant funds as reimbursement
  - a. If *Working Capital*, add **Initial Advance** and **Working Capital Rate**.

**Note**

This section is only available when **Working Capital** is selected.

**Note**

Federal budget categories are predefined and cannot be edited.

## Payment Schedule

18. Add **monthly payment schedule** for the award. The ending balance must be \$0.00 at the end of the grant.

## Categories

19. Select **Budget Categories** to be available on the submission budget. This list pulls from *Administration>Lists>Budget Categories*.
20. Click **Add**.

## Benefits

21. Select how to **Add Benefits By**.
  - **Personnel:** benefits are planned per employee and will use staff compensation data on personnel line items
  - **Benefit Type:** benefits are planned as separate line items for all grant-funded positions
22. Select a **Supported Benefit Type**. This list pulls from *Administration>Lists>Benefit Types*.
23. Click **Add**.

24. Click **Save**.

**Note**

Depending on your account settings, this record type may have additional custom fields or sections.

## How To Add a Category to the Submission Budget

Budget categories can be selected from the *Pre-Award tab>Submission Budget Settings*. Budget categories inherit settings from the budget by default.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.

**! Note**

Line items within the budget category will inherit its settings. The indirect and match settings must be configured in Submission Budget Settings in order for category values to calculate.

3. Open the **Pre-Award tab>Submission Budget**.
4. Click the **+** (**Add icon**) next to *Expense Budget*.



5. In the pop-up window, select a **Category** in the *Category Details* section. This list pulls from the categories created in *Pre-Award tab>Submission Budget Settings*.
6. Enter the **Budgeted Amount** for the category. The sum of the line items within this budget category cannot exceed this amount.
7. Select the **Indirect Cost** requirements for all line items within the category.
  - **Disable:** indirect cost will not be tracked within the budget category
  - **Enable:** indirect cost may be tracked within the budget category on a per-line item basis
  - **Require:** indirect cost will always be tracked within the budget category
8. Select the **Cash Match** requirements for all line items within the category.
  - **Disable:** cash match will not be tracked within the budget category
  - **Enable:** cash match may be tracked within the budget category on a per-line item basis
  - **Require:** cash match will always be tracked within the budget category
9. Select the **In-Kind Match** requirements for all line items within the category.
  - **Disable:** in-kind match will not be tracked within the budget category
  - **Enable:** in-kind match may be tracked within the budget category on a per-line item basis
  - **Require:** in-kind match will always be tracked within the budget category
10. Select the **Other Funding** requirements for all line items within the category.
  - **Disable:** other funding will not be tracked within the budget category
  - **Enable:** other funding may be tracked within the budget category on a per-line item basis
  - **Require:** other funding will always be tracked within the budget category
11. Click **Lock** to prevent line items being added to the category or the category being edited (optional).


**! Note**

Line items within a locked category can be edited. Locked categories may be unlocked by Organizational Admin, Department Admin, or the Grant Manager.



12. Click **Create**.


## How To Edit a Category on the Submission Budget

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Budget**.
4. Click the  (**Edit icon**) next to a category name.



5. Update the information as necessary.
6. Click **Save**.

## How To Delete a Category on the Submission Budget


1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Budget**.
4. Click the  (**Delete icon**) next to a category name.



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

## How To Unlock a Category on the Submission Budget

Prerequisite: Must be Organizational Admin, Department Admin, or Grant Manager.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Budget**.
4. Click the  (**Edit icon**) next to a locked category's name.



5. In the pop-up window, click **Unlock**.



6. Click **Save**.

**Note**

Depending on your account settings, this record type may have additional custom fields or sections.

## How To Add a Submission Budget Line Item

Budget line items are the planned expenses related to a grant and contain information such as associated GL accounts, responsible individuals, and attachments. Line items can be within a category or uncategorized.

There are three line items types: Personnel, Non-Personnel, and Benefit Type line items. Personnel line items are budgeted staff compensation expenses. Non-personnel line items are budgeted expenses that do not fund staff compensation. Benefit Type line items are planned benefit expenses for all grant-funded staff. Benefit Type line items are only available if benefits are not tracked within personnel line items in the Budget Settings.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Budget**.
4. Click the **+ (Add icon)** next to a budget category.



5. In the *General tab* of the pop-up window, select the **Item Type**. This can be **Personnel**, **Non-Personnel**, or **Benefit Type**.
6. Add line item information.
7. Click **Lock** to prevent line items being added to the category or the category being edited (optional).



8. Click **Create**.

## How To Add a **Personnel** Submission Budget Line Item

Personnel line items are budgeted staff compensation expenses. For more information about compensation history, see the [AmpliFund Contact Management Guide Euna Grants Contact Management Guide](#).

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Budget**.
4. Click the **+ (Add icon)** next to a budget category.
5. In the *General tab* of the pop-up window, select **Personnel** from the *Item*

Type dropdown.

**Note**

If the employee has compensation history, the salary defaults to the compensation amount for the period. The *Designation to Awarded* and *Designation to Pending Grants* percentages show the percent of the salary already designated to other grants' personnel line items.

6. Select the **Category**.
7. Select the **Employee** name. This list pulls from *Contacts>Staff*.
  - a. If the employee is unknown, check the **Choose employee at later date checkbox**.
  - b. Add a line item **Name**.

A screenshot of a form field. On the left, the text 'Name\*' is visible. To its right is a text input box containing the placeholder text 'Line Item Name'. Below the input box is a checkbox that is checked, with the label 'Choose employee at a later date'.

8. Add the **Position** (optional).
9. Add the amount of funded **Salary**.
10. Add **Benefits** and **Direct Cost** (optional).
11. Check the **Exclude From Match checkbox** as necessary. This option will not be available if the category match requirements are set to *Disable* or *Require*.
12. Check the **No Salary Data Used for Staff** as necessary.
  - a. If unchecked, add **Designation To This Grant percentage** (in decimal format) to update the *Salary* amount (optional).

A screenshot of a form section. At the top, there is a checkbox labeled 'No salary data used for staff'. Below this are three rows, each with a label and a percentage input field:
 

- 'Designation To Awarded Grants' with a value of '0.00000000 %'
- 'Designation To Pending Grants' with a value of '0.00000000 %'
- 'Designation To This Grant' with a value of '80.00000000 %'

13. Select the **Responsible Individual**. This list pulls from *Contacts>Staff*.
14. Add a **Description** (optional).
15. In the *Configuration tab*, check the **Generates Indirect checkbox** as necessary. This option will not be available if the category indirect requirements are set to *Disable* or *Require*.
16. Click **Lock** to prevent line item from being edited (optional).

A screenshot of a button bar. It contains three buttons: a blue 'Save' button, a red 'Lock' button, and a grey 'Close' button.

17. Click **Create**.

## How To Add a **Non-Personnel** Submission Budget Line Item

Non-personnel line items are budgeted expenses that do not fund staff salary or staff benefits.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Budget**.
4. Click the **+ (Add icon)** next to a budget category.
5. In the *General tab* of the pop-up window, select **Non-Personnel** from the *Item Type* dropdown.
6. Add a line item **Name**.
7. Add the **Direct Cost**.
8. Check the **Exclude From Match checkbox** as necessary. This option will not be available if the category match requirements are set to *Disable* or *Require*.
9. Select the **Responsible Individual**. This list pulls from *Contacts>Staff*.
10. Add a **Description** (optional).
11. In the *Configuration tab*, check the **Generates Indirect checkbox** as necessary. This option will not be available if the category indirect requirements are set to *Disable* or *Require*.
12. Click **Lock** to prevent line item from being edited (optional).



13. Click **Create**.

## How To Add a **Benefit Type** Submission Budget Line Item

Benefit Type line items are planned benefit expenses for all grant-funded staff.

Prerequisites: Benefit Types are added in the Budget Settings and benefit items are not budgeted per each grant-funded employee

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Budget**.
4. Click the **+ (Add icon)** next to a budget category.
5. In the *General tab* of the pop-up window, select **Benefit Type** from the *Item Type* dropdown.
6. Select a **Benefit Type**.
7. Add the **Direct Cost**.
8. Check the **Exclude From Match checkbox** as necessary. This option will not be available if the category match requirements are set to *Disable* or *Require*.


9. Select the **Responsible Individual**. This list pulls from *Contacts>Staff*.
10. Add a **Description** (optional).
11. In the *Configuration tab*, check the **Generates Indirect checkbox** as necessary. This option will not be available if the category indirect requirements are set to *Disable* or *Require*.
12. Click **Lock** to prevent line item from being edited (optional).



13. Click **Create**.

## How To Add Financial Information to a Submission Budget Line Item



The *Financials tab* allows users to add more detail to the direct cost and matching planned amounts, and to associate GL accounts with the line item. Users may allocate line items across grant years or months. Line items are allocated evenly by month across the line item life unless unevenly spread.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Budget**.
4. Click the  (**Edit icon**) next to a line item.



5. In the pop-up window, open the **Financials tab**.
6. Add the **Cash Match Amount**, **In-Kind Match Amount**, and **Other Funding Amount** in dollars or percentages.

Cash Match Amount	\$	0.00	%
In Kind Match Amount	\$	0.00	%
Other Funding Amount	\$	0.00	%


7. Select a **GL account**. This list pulls from *Administration>Lists>GL Accounts*.
8. Click **Add**. You can add multiple GL accounts if necessary.
9. Select if you wish to view your allocations **Yearly** or **Monthly**.
10. Add **allocation amounts**. Click the  (**Clear icon**) to remove all selections. Click the  (**Spread Evenly icon**) to spread amounts equally over the grant's months.

Grant Year	Start Year	Amount
------------	------------	--------

11. Click **Save**.

## How To Add Benefits Information to a Personnel Submission Budget Line Item


Prerequisites: Must be a personnel line item where benefits are planned on a per-staff member basis. Benefit type must be added in the grant's budget settings.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Budget**.
4. Click the  (**Edit icon**) next to a line item.




5. In the pop-up window, open the **Benefits tab**.
6. Select the **Supported Benefit Type**. This list pulls from the *Pre-Award tab>Submission Budget Settings*.
7. Click **Add**. You can add multiple benefit types if necessary.
8. Add the benefit **Amount** in dollars or percentages.
9. Check **Exclude From Match** and **Generates Indirect checkboxes** as necessary.
10. Click **Save**.

## How To Add an Attachment to a Submission Budget Line Item

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Budget**.
4. Click the  (**Edit icon**) next to a line item.
5. In the pop-up window, open the **Attachments tab**.
6. Click **Choose a File** to select a file from your computer.
7. Click the **+** (**Add icon**) to add additional attachments as needed.
8. Click **Save**.

## How To Unlock a Submission Budget Line Item

Prerequisite: Must be Organizational Administrator, Department Admin, or Grant Manager

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Budget**.
4. Click the  (**Edit icon**) next to a locked line item.




5. In the pop-up window, click **Unlock**.



6. Click **Save**.


## How To Edit a Submission Budget Line Item

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Budget**.
4. Click the  (**Edit icon**) next to a line item.



5. Update the information as necessary.
6. Click **Save**.

## How To Delete a Submission Budget Line Item

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Budget**.
4. Click the  (**Delete icon**) next to a line item.

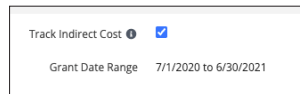


5. In the confirmation pop-up window, click **Delete**.

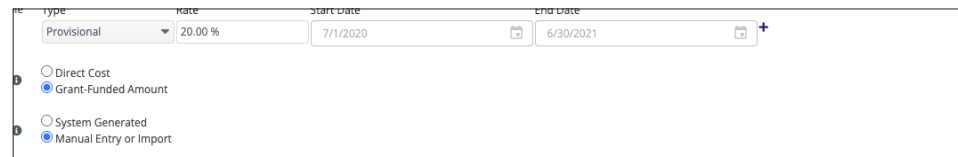
## How To Add Indirect to a Submission Budget

Indirect, or overhead, calculates and tracks costs associated indirectly with the grant. On the budget, indirect is system calculated only; the amount cannot be edited by the user. Indirect cost is calculated as the indirect rate of allocations of budget line items that generate indirect. Indirect will appear as a locked category with an Indirect Cost line item.

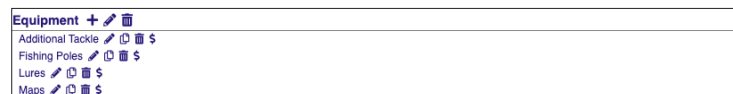
1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Budget Settings**.
4. Click the **✎ (Edit icon)** in the *Icon Bar*.
5. In the *Indirect* section, check the **Track Indirect Cost checkbox**. If checked, an indirect cost category will appear in the grant's Expense Budget which cannot be edited.



6. Select a **Rate Type**.
7. Add the **Indirect Rate** (in decimal format).
8. Select the **Start Date** and **End Date**.
9. Click the **+ (Add icon)** to add additional indirect cost rates.



10. Open the **Pre-Award tab>Submission Budget**.
11. Click the **✎ (Edit icon)** next to a line item within a category that has indirect cost enabled.



12. In the pop-up window, open the **Configuration tab**.
13. Check the **Generates Indirect checkbox**. The generated indirect amount will be added to the *Indirect Cost* line item.




## Note

The GL Code, GL Name, GL Class 1, and GL Class 2 must **exactly match** what is in *Administration>Lists>GL Accounts*. If you have defined your GL Accounts, you must ensure that the column headers and number of columns match what you have defined in *Administration>License Information>Settings* tab. The Responsible Staff and Personnel Staff names must **exactly match** what is in *Contacts>Staff*.

## How To Import Submission Budget Line Items

Organizational Administrators and Grant Managers can import multiple budget line items using the [Budget Import Template Budget Import Template](#) (recommended) or their own Excel file. The Budget Import Template includes the Grant ID, Line Item ID, Line Item Type\*, Budget Category\*, Benefit Type, Name\*, Description, GL Account IDs, GL Name, GL codes, Responsible Staff\*, Direct Cost\*, Project Line Item, Exclude From Match, Generates Indirect, Cash Match Value, Cash Match Type, In-Kind Match Value, In-Kind Match Type, Other Funding Value, Other Funding Type, Personnel Staff, and Personnel Title fields. Required fields have asterisks (\*) next to their names.


1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award Tab>Submission Budget**.
4. Click the  (**Import icon**) in the *Icon Bar*.
5. In the pop-up window, click **Choose a file** to select a file from your computer.
6. Select the **Destination** field for each Source column. If you are using the [Budget Import Template Budget Import Template](#) (recommended), the source and destination fields should match.
7. Click **Import**.

## Note

The GL Code, GL Name, GL Class 1, and GL Class 2 must **exactly match** what is in *Administration>Lists>GL Accounts*. If you have defined your GL Accounts, you must ensure that the column headers and number of columns match what you have defined in *Administration>License Information>Settings* tab. The Responsible Staff and Personnel Staff names must **exactly match** what is in *Contacts>Staff*.

## How To Import Submission Budgets

Organizational Administrators can import multiple budgets using the [Budget Import Template Budget Import Template](#) (recommended) or their own Excel file. The Budget Import Template includes the Grant ID, Line Item ID, Line Item Type\*, Budget Category\*, Benefit Type, Name\*, Description, GL Account IDs, GL Name, GL codes, Responsible Staff\*, Direct Cost\*, Project Line Item, Exclude From Match, Generates Indirect, Cash Match Value, Cash Match Type, In-Kind Match Value, In-Kind Match Type, Other Funding Value, Other Funding Type, Personnel Staff, and Personnel Title fields. Required fields have asterisks (\*) next to their names.












1. Open **Grant Management>Grants>All Grants**.
2. Click the  (**Import icon**) in the *Icon Bar*.
3. In the pop-up window, select **Budget Import** from the *Choose Import* dropdown.
4. In the *Award Type* dropdown, select **Pre-Award**.
5. Select to *Identify Grant by* grant **ID** or **Unique Identifier**.
6. In the pop-up window, click **Choose a file** to select a file from your computer.

7. Select the **Destination** field for each Source column. If you are using the [Budget Import Template Budget Import Template](#) (recommended), the source and destination fields should match.
8. Click **Import**.

## ***Award***

Upon award, Organizational Administrators, Department Administrators, and Grant Managers can update grant details and seamlessly copy the grant's submission performance plan to the *Post-Award tab*. From there, the performance plan can be edited to accurately reflect the grant requirements as specified by the funding organization.

## Icons

	Print
	Help
	Add
	Copy to Post-Award Performance Plan
	Submission Performance Plan Report
	Save Current View
	Import
	Export
	Edit
	Copy
	Delete

### Note


The submission performance plan cannot be copied more than once. Once copied, any edits should be made on the post-award performance plan.

## Setting Up a Grant as a Recipient

Once a grant has been awarded, Organizational Admin, Department Admin, and Grant Managers can update grant details and copy the submission performance plan to the *Post-Award tab*. A grant is awarded when its status is *Approved*.

### How To Mark a Grant as Awarded

Prerequisite: Must be Organizational Administrator, Department Admin, or Grant Manager

1. Open **Grant Management>Grants>All Grants**.
2. Click the **grant name**.
3. Click the  (**Edit icon**) in the Icon Bar.


### Status

4. In the *Award Status* dropdown, select **Approved**.
5. Update post-award information as necessary.
6. Click **Save**.

### How To Copy a Submission Performance Plan to Post-Award

Prerequisite: Must be Organizational Administrator, Department Admin, or Grant Manager and grant must be in *Approved* status

The submission performance plan can be copied to *Post-Award tab*. Once copied, the goals and strategies can be edited to reflect the grant requirements set by the funding organization.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Performance Plan**.
4. Click the  (**Copy to Post-Award icon**) in the *Icon Bar*.
5. In the confirmation pop-up window, click **Copy**.


### How To Copy a Submission Budget to Post-Award

The submission budget can be copied to Post-Award tab. Once copied, the budget settings, categories, and line items can be edited to reflect the grant requirements set by the funding organization.












Prerequisite: Must be Organizational Administrator, Department Admin, or Grant Manager and grant must be in *Approved* status

 **Note**

The submission budget cannot be copied more than once. Once copied, any edits should be made on the post-award budget.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Budget**.
4. Click the  (**Copy to Post-Award icon**) in the *Icon Bar*.
5. In the confirmation pop-up window, click **Copy**.

## Icons

-  Print
-  Help
-  Add
-  Copy to Post-Award Performance Plan
-  Submission Performance Plan Report
-  Save Current View
-  Import
-  Export
-  Edit
-  Copy
-  Delete

# Setting Up an Award as a Funder

Awarded grants will appear under *Grant Management>Grants Awarded*. These are grants that your organization has awarded or will award to a sub-recipient or recipient organization. Awards can be created from funds, grants (as sub-awards), or fund or grant opportunities. For more information on awards, see the [Award Management Guide Award Management Guide](#).

The Grants Awarded list shows the *Award Name, Recipient, Funding Source, Total Awarded Amount, Start Date, Length of Award, Status, and Activated* columns by default. In addition, the following columns are available: *Award Identification Number, Request for Proposal ID, Funding Opportunity ID, Assistance Listings Number, Activity Code, Awarded Date, End Date, Close Out Date, Federal Agency Identification Number, Recipient Account Number, Budget Tracking Interval, Budget Item Due Date, Performance Tracking Interval, Performance Plan Due Date, Cash Match Amount, In-Kind Match Amount, Description, Award Details, Eligibility Requirements, Additional Information, and Unique Identifier*. Each of these columns may be shown, hidden, sorted, or filtered. See the [AmpliFund User Interface Navigation Guide Euna Grants User Interface Navigation Guide](#) to learn more about modifying Euna Grants page views.

## How To Configure Award Performance Plan Settings

As a funder, you can configure award performance plan settings for your recipient organization, including editing permissions and available goal types.

1. Open **Grant Management>Grants Awarded**.
2. Click an unactivated **grant award name**.
3. Open the **Post-Award tab>Settings>Performance Plan Settings**.

## Recipient Settings

4. Select **Performance Plan Creation** permissions.
  - **Recipient and Funder can edit:** Both recipient and funder organizations can create and edit performance goals and strategies.
  - **Recipient can view, Funder can edit:** Only the funder can create and edit performance goals and strategies. The recipient can view the performance plan and is still responsible for adding achievements against performance goals.
  - **Recipient can edit, Funder can view:** Only the recipient can create and edit performance goals and strategies. The funder can still view the performance plan.
5. Select **Achievement Creation** permissions.


- **Recipient and Funder can edit:** Both recipient and funder organizations can create and edit achievements against performance goals.
- **Recipient can view, Funder can edit:** Only the funder can create and edit achievements against performance goals. The recipient can still view achievements.
- **Recipient can edit, Funder can view:** Only the recipient can create and edit achievements against performance goals. The funder can still view achievements.

## Goal Types

6. Select **Available Goal Types** for the performance plan. For more a extensive description of goal types, see [Goal Types](#).
  - **Milestone:** Yes/No
  - **Narrative:** Question and answer
  - **Numeric:** Number to achieve
  - **Percent Achieved:** Target percent to achieve
  - **Percent Change:** Percent increase or decrease
  - **Reimbursement:** Number to achieve with dollar amount associated per unit
7. Click **Save**.

## How To Configure Award Budget Settings

As a funder, you can configure award budget settings for your recipient organization, including editing permissions, match and indirect cost rate, and available budget categories and benefits.

1. Open **Grant Management>Grants Awarded**.
2. Click an unactivated **grant award name**.
3. Open the **Post-Award tab>Settings>Budget Settings**.
4. Click the  (**Edit icon**) in the *Icon Bar*.

## Recipient Settings

5. Select **Budget Creation** permissions.
  - **Recipient and Funder can edit:** Both recipient and funder organizations can create and edit budget categories and line items.
  - **Recipient can view, Funder can edit:** Only the funder can create and edit budget categories and line items. The recipient can view the budget and is still responsible for adding expenses against line items.
  - **Recipient can edit, Funder can view:** Only the recipient can create

and edit budget categories and line items. The funder can still view the budget.

6. Select **Expense Creation** permissions.
  - **Recipient and Funder can edit:** Both recipient and funder organizations can create and edit expenses against line items.
  - **Recipient can view, Funder can edit:** Only the funder can create and edit expenses against line items. The recipient can still view the budget.
  - **Recipient can edit, Funder can view:** Only the recipient can create and edit expenses against line items. The funder can still view the budget.

## Matching

7. Select the default **Match** requirements. These can also be set on the category or line item.
  - **Disable:** match will not be tracked on budget categories or line items
  - **Enable:** match may be tracked on budget categories or line items
  - **Require:** cash match will always be tracked on budget categories and line items
8. Select **Use Match Percentage As**.
  - **Percentage of Total Grant Budget:** calculates match as percent of total budget, including grant-funded and match (i.e., 50% match of \$150,000 total budget = \$75,000)
  - **Percentage of Grant-Funded Amount:** calculates match as percent of grant-funded amount only (i.e., 50% match of \$150,000 total budget = \$50,000)
9. Select **Default Cash Match**. This is the amount or percent that will be inherited by budget categories and line items.
  - a. If *Percentage* is selected, add the **Cash Match Percent** (in decimal format).
  - b. If *Amount* is selected, add the **Cash Match Amount**.
10. Select **Default In-Kind Match Personnel** This is the amount or percent that will be inherited by personnel line items.
  - a. If *Percentage* is selected, add the **In-Kind Match Personnel Percent** (in decimal format).
  - b. If *Amount* is selected, add the **In-Kind Match Personnel Amount**.
11. Select **Default In-Kind Match Non-Personnel**. This is the amount or percent that will be inherited by non-personnel line items.
  - a. If *Percentage* is selected, add the **In-Kind Match Non-Personnel Percent** (in decimal format).
  - b. If *Amount* is selected, add the **In-Kind Match Non-Personnel Amount**.
12. Select **Default Other Funding**. This is the amount or percent that will be

inherited by non-personnel line items.

- a. If *Percentage* is selected, add the **Other Funding Percent** (in decimal format).
- b. If *Amount* is selected, add the **Other Funding Amount**.

## Indirect

13. Check the **Track Indirect Cost checkbox**. If checked, an indirect cost category will appear in the grant's Expense Budget which cannot be edited.

Track Indirect Cost

Grant Date Range 7/1/2020 to 6/30/2021

14. Select a **Rate Type**.
15. Add the **Indirect Rate** (in decimal format).
16. Select the **Start Date** and **End Date**.
17. Click the **+ (Add icon)** to add additional indirect cost rates.

type	rate	start date	end date
Provisional	20.00 %	7/1/2020	6/30/2021

Direct Cost  
 Grant-Funded Amount  
 System Generated  
 Manual Entry or Import

18. If Match is enabled, select the how indirect should be calculated on the *Calculate Indirect By* field.
  - **Direct Cost:** Match is included when calculating indirect
  - **Grant-Funded Amount:** Match is excluded when calculating indirect
19. On the *Add Indirect Expenses By* field, select how indirect expenses will be added by default.
  - **System Generated:** Indirect expenses will be automatically created when expenses are added against line items that generate indirect.
  - **Manual Entry or Import:** Indirect expenses will be added or imported by users.

### **!** Note

Depending your account settings, this section may not be available.

## Reconciliation Methods

20. Select from the available **Allowable Reconciliation Methods**.
  - **Advance Payment:** Grant funds are given to recipient in advance as full lump sum
  - **Working Capital:** Grant funds are given to recipient in a defined payment schedule which includes an initial advance
  - **Reimbursement:** Recipient spends own money and then requests grant funds as reimbursement

- a. If *Working Capital*, add **Initial Advance** and **Working Capital Rate**.

**Note**

This section is only available when **Advance Payment** is selected.

**Note**

Federal budget categories are predefined and cannot be edited.

## Payment Schedule

21. Add **monthly payment schedule** for the award. The ending balance must be \$0.00 at the end of the grant.

## Categories

22. Select **Budget Categories** to be available on the budget. This list pulls from *Administration>Lists>Budget Categories*.
23. Click **Add**.

24. Check the **Allow Recipients to Create Categories checkbox** as necessary. This will allow recipients to add additional budget categories to the budget from *Administration>Lists>Budget Categories*.

## Benefits


25. Select how to **Add Benefits By**.
- **Personnel:** benefits are planned per employee and will use staff compensation data on personnel line items
  - **Benefit Type:** benefits are planned as separate line items for all grant-funded positions
26. Select a **Supported Benefit Type**. This list pulls from *Administration>Lists>Benefit Types*.
27. Click **Add**.

28. Check the **Allow Recipients to Set Up Benefits checkbox** as necessary. This will allow recipients to add additional benefit types to the budget from *Euna Grants>Lists>Benefit Types*.
29. Click **Save**.

## How To Activate a Grant Award

Prerequisite: The Performance Plan Settings and Budget Settings must be configured.

Activating an award will send the recipient organization an invitation email to manage their award in Euna Grants.

1. Open **Award Management>Grant Awards**.
2. Click an unactivated **award name**.
3. Click the  (**Edit icon**) in the Icon Bar.
4. Update the information as necessary.


## Award Information

5. Select **Budget Tracking Interval** and **Performance Tracking Interval**.
6. Click **Activate**.



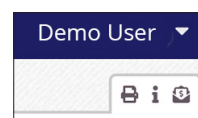
## How To Activate Multiple Grant Awards

Activating an award will send the recipient organization an invitation email to manage their award in Euna Grants.

1. Open **Grant Management>Grants Awarded**.
2. Click the  (**Activate Award icon**) in the *Icon Bar*.
3. Select awards or check the **select all checkbox column**.

<input type="checkbox"/>	Award Name
<input type="checkbox"/>	ABC Foundation - Award

4. Click the  (**Activate Award icon**) in the *Icon Bar*.
















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

## ***Post-Award***

The Post-Award section of the grant record allows users to manage the grant, grant award, or sub-award from award through closeout. Users can add and track achievements against performance goals; spend down; tracking and reporting periods; payment requests, receipts, and authorizations; amendments; grant opportunities; and sub-awards.

## Icons

-  Print
-  Help
-  Grant Budget Variance Report
-  Import
-  Export
-  Add
-  Edit
-  Copy
-  Delete
-  Add Amendment
-  Expenses
-  Locked
-  Spread Evenly
-  Clear


# Financial

The Financial section of the Post-Award tab includes the grant's planned budget and expenses. A grant's budget includes tracks actual expenses against planned expenditures throughout the life of the grant. Grant budgets can include match; indirect; personnel, non-personnel, and benefit line items; and multiple grant years.

Budgets show the budget categories, grant-funded amounts, total costs, and total revenue by default. Additionally, grant years, line items, Responsible Individuals, GL accounts, actuals, and remaining amounts can be shown or hidden. As actuals are added against the budget, they can be displayed and filtered by expense date. This includes any Closed, Reviewed, Payment Requested, or Paid expenses.

Budget settings define a grant's default match and indirect cost rate, budget categories, and benefit types. The budget settings should be configured before adding budget categories or line items. In addition, budget settings can be set on the category or line item.

## How To Configure Grant Budget Settings

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Settings>Budget Settings**.
4. Click the  (**Edit icon**) in the *Icon Bar*.

## Matching

5. Select the default **Match** requirements. These can also be set on the category or line item.
  - **Disable:** match will not be tracked on budget categories or line items
  - **Enable:** match may be tracked on budget categories or line items
  - **Require:** cash match will always be tracked on budget categories and line items
6. Select **Use Match Percentage As**.
  - **Percentage of Total Grant Budget:** calculates match as percent of total budget, including grant-funded and match (i.e., 50% match of \$150,000 total budget = \$75,000)
  - **Percentage of Grant-Funded Amount:** calculates match as percent of grant-funded amount only (i.e., 50% match of \$150,000 total budget = \$50,000)
7. Select **Default Cash Match**. This is the amount or percent that will be inherited by budget categories and line items.

- a. If *Percentage* is selected, add the **Cash Match Percent** (in decimal format).
  - b. If *Amount* is selected, add the **Cash Match Amount**.
8. Select **Default In-Kind Match Personnel**. This is the amount or percent that will be inherited by personnel line items.
- a. If *Percentage* is selected, add the **In-Kind Match Personnel Percent** (in decimal format).
  - b. If *Amount* is selected, add the **In-Kind Match Personnel Amount**.
9. Select **Default In-Kind Match Non-Personnel**. This is the amount or percent that will be inherited by non-personnel line items.
- a. If *Percentage* is selected, add the **In-Kind Match Non-Personnel Percent** (in decimal format).
  - b. If *Amount* is selected, add the **In-Kind Match Non-Personnel Amount**.
10. Select **Default Other Funding**. This is the amount or percent that will be inherited by non-personnel line items.
- a. If *Percentage* is selected, add the **Other Funding Percent** (in decimal format).
  - b. If *Amount* is selected, add the **Other Funding Amount**.

## Indirect

11. Check the **Track Indirect Cost checkbox**. If checked, an indirect cost category will appear in the grant's Expense Budget which cannot be edited.

Track Indirect Cost    
 Grant Date Range 7/1/2020 to 6/30/2021

12. Select a **Rate Type**.
13. Add the **Indirect Rate** (in decimal format).
14. Select the **Start Date** and **End Date**.
15. Click the **+** (Add icon) to add additional indirect cost rates.

type: Provisional rate: 20.00 % start date: 7/1/2020 end date: 6/30/2021 +

Direct Cost  
 Grant-Funded Amount  
 System Generated  
 Manual Entry or Import

16. If Match is enabled, select the how indirect should be calculated on the *Calculate Indirect By* field.
- **Direct Cost:** Match is included when calculating indirect
  - **Grant-Funded Amount:** Match is excluded when calculating indirect

17. On the *Add Indirect Expenses By* field, select how indirect expenses will be added by default.
  - **System Generated:** Indirect expenses will be automatically created when expenses are added against line items that generate indirect.
  - **Manual Entry or Import:** Indirect expenses will be added or imported by users.

**Note**

Depending your account settings, this section may not be available.

### Reconciliation Methods

18. Select from the available **Allowable Reconciliation Methods**.
  - **Advance Payment:** Grant funds are given to recipient in advance as full lump sum
  - **Working Capital:** Grant funds are given to recipient in a defined payment schedule which includes an initial advance
  - **Reimbursement:** Recipient spends own money and then requests grant funds as reimbursement
    - a. If *Working Capital*, add **Initial Advance** and **Working Capital Rate**.

**Note**

This section is only available when **Advance Payment** is selected .

### Payment Schedule

19. Add **monthly payment schedule** for the award. The ending balance must be \$0.00 at the end of the grant.

**Note**

Federal budget categories are predefined and cannot be edited.

### Categories

20. Select **Budget Categories** to be available on the budget. This list pulls from *Administration>Lists>Budget Categories*.
21. Click **Add**.

### Benefits

22. Select how to **Add Benefits By**.
  - **Personnel:** benefits are planned per employee and will use staff compensation data on personnel line items
  - **Benefit Type:** benefits are planned as separate line items for all grant-funded positions
23. Select a **Supported Benefit Type**. This list pulls from *Administration>Lists>Benefit Types*.
24. Click **Add**.

25. Click **Save**.

### **Note**

Depending on your account settings, this record type may have additional custom fields or sections.

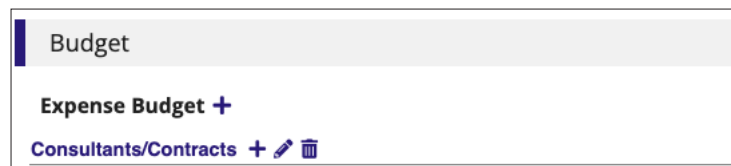
### **Note**

Line items within the budget category will inherit its settings. The indirect and match settings must be configured in Budget Settings in order for category values to calculate.

## How To Add a Category to Grant Budget

Budget categories can be selected from the *Post-Award tab>Settings>Budget Settings*. Budget categories inherit settings from the budget by default.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Financial>Budget**.
4. Click the **+ (Add icon)** next to *Expense Budget*.



## Category Details

5. In the pop-up window, select a **Category**. This list pulls from the categories created in the *Post-Award tab>Settings>Budget Settings*.
6. Enter the **Budgeted Amount** for the category. The sum of the line items within this budget category cannot exceed this amount.
7. Select the **Indirect Cost** requirements for all line items within the category.
  - **Disable:** indirect cost will not be tracked within the budget category
  - **Enable:** indirect cost may be tracked within the budget category on a per-line item basis
  - **Require:** indirect cost will always be tracked within the budget category
8. Select the **Cash Match** requirements for all line items within the category.
  - **Disable:** cash match will not be tracked within the budget category
  - **Enable:** cash match may be tracked within the budget category on a per-line item basis
  - **Require:** cash match will always be tracked within the budget category
9. Select the **In-Kind Match** requirements for all line items within the category.
  - **Disable:** in-kind match will not be tracked within the budget category
  - **Enable:** in-kind match may be tracked within the budget category on a per-line item basis
  - **Require:** in-kind match will always be tracked within the budget category
10. Select the **Other Funding** requirements for all line items within the category.
  - **Disable:** other funding will not be tracked within the budget category

- **Enable:** other funding may be tracked within the budget category on a per-line item basis
- **Require:** other funding will always be tracked within the budget category

**Note**

Line items within a locked category can be edited. Locked categories may be unlocked by Organizational Admin, Department Admin, or the Grant Manager.

11. Click **Lock** to prevent line items being added to the category or the category being edited (optional).



12. Click **Create**.

## How To Edit a Category on Grant Budget

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Financial>Budget**.
4. Click the **✎ (Edit icon)** next to a category name.



5. Update the information as necessary.
6. Click **Save**.

## How To Delete a Category on Grant Budget

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Financial>Budget**.
4. Click the **🗑 (Delete icon)** next to a category name.



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


**Note**

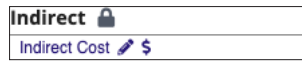
Line items within a locked category can be edited. Locked categories may be unlocked by Organizational Admin, Department Admin, or the Grant Manager.

## How To Unlock a Category on Grant Budget

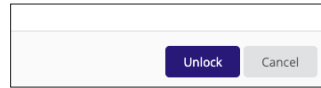
Prerequisite: Must be Organizational Admin, Department Admin, or Grant Manager.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.

- Open the **Post-Award tab>Financial>Budget**.
- Click the  (**Edit icon**) next to a locked category's name.



- In the pop-up window, click **Unlock**.



- Click **Save**.

### Note

Depending on your account settings, this record type may have additional custom fields or sections.

## How To Add a Grant Budget Line Item

Budget line items are the planned expenses related to a grant and contain information such as associated GL accounts, responsible individuals, and attachments. Line items can be within a category or uncategorized.

There are three line items types: Personnel, Non-Personnel, and Benefit Type line items. Personnel line items are budgeted staff compensation expenses. Non-personnel line items are budgeted expenses that do not fund staff compensation. Benefit Type line items are planned benefit expenses for all grant-funded staff. Benefit Type line items are only available if benefits are not tracked within personnel line items in the [Budget Settings](#).

- Open **Grant Management>Grants>All Grants**.
- Click a **grant name**.
- Open the **Post-Award tab>Financial>Budget**.
- Click the **+** (**Add icon**) next to a budget category.



- In the *General tab* of the pop-up window, select the **Item Type**. This can be [Personnel](#), [Non-Personnel](#), or [Benefit Type](#).
- Add line item information.
- Click **Lock** to prevent line items being added to the category or the category being edited (optional).



- Click **Create**.

## How To Add a Grant **Personnel** Budget Line Item

Personnel line items are budgeted staff compensation expenses. For more

information about compensation history, see the [AmpliFund Contact Management Guide Euna Grants Contact Management Guide](#).

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Financial>Budget**.
4. Click the **+ (Add icon)** next to a budget category.
5. In the *General tab* of the pop-up window, select **Personnel** from the *Item Type* dropdown.
6. Select the **Category**.

**! Note**

If the employee has compensation history, the salary defaults to the compensation amount for the period. The *Designation to Awarded* and *Designation to Pending Grants* percentages show the percent of the salary already designated to other grants' personnel line items.

7. Select the **Employee** name. This list pulls from *Contacts>Staff*.
  - a. If the employee is unknown, check the **Choose employee at later date checkbox**.
  - b. Add a line item **Name**.

A screenshot of a form field. On the left, the text 'Name\*' is visible. To its right is a text input box containing the placeholder text 'Line Item Name'. Below the input box is a checkbox that is checked, with the label 'Choose employee at a later date'.

8. Add the **Position** (optional).
9. Add the amount of funded **Salary**.
10. Add **Benefits** and **Direct Cost** (optional).
11. Check the **Exclude From Match checkbox** as necessary. This option will not be available if the category match requirements are set to *Disable* or *Require*.
12. Check the **Exclude From Indirect checkbox** as necessary. This option will not be available if the category indirect requirements are set to *Disable* or *Require*.
13. Check the **No Salary Data Used for Staff** as necessary.
  - a. If unchecked, add **Designation To This Grant percentage** (in decimal format) to update the *Salary* amount (optional).

A screenshot of a form section. At the top, there is a checkbox labeled 'No salary data used for staff'. Below this are three rows, each with a label and a percentage input field:
 

- 'Designation To Awarded Grants' with an input field containing '0.00000000 %'
- 'Designation To Pending Grants' with an input field containing '0.00000000 %'
- 'Designation To This Grant' with an input field containing '80.00000000 %'

14. Select the **Responsible Individual**. This list pulls from *Contacts>Staff*.
15. Add a **Description** (optional).

- Click **Lock** to prevent line item from being edited (optional).



- Click **Create**.

## How To Add a Grant **Non-Personnel** Budget Line Item

Non-personnel line items are budgeted expenses that do not fund staff salary or staff benefits.

- Open **Grant Management>Grants>All Grants**.
- Click a **grant name**.
- Open the **Post-Award tab>Financial>Budget**.
- Click the **+ (Add icon)** next to a budget category.
- In the *General tab* of the pop-up window, select **Non-Personnel** from the *Item Type* dropdown.
- Add a line item **Name**.
- Add the **Direct Cost**.
- Check the **Exclude From Match checkbox** as necessary. This option will not be available if the category match requirements are set to *Disable* or *Require*.
- Check the **Exclude From Indirect checkbox** as necessary. This option will not be available if the category indirect requirements are set to *Disable* or *Require*.
- Select the **Responsible Individual**. This list pulls from *Contacts>Staff*.
- Add a **Description** (optional).
- Click **Lock** to prevent line item from being edited (optional).



- Click **Create**.

## How To Add a Grant **Benefit Type** Budget Line Item

Benefit Type line items are planned benefit expenses for all grant-funded staff.

Prerequisites: Benefit Types are added in the **Budget Settings** and benefit items are not budgeted per each grant-funded employee

- Open **Grant Management>Grants>All Grants**.
- Click a **grant name**.
- Open the **Post-Award tab>Financial>Budget**.

4. Click the **+** (**Add icon**) next to a budget category.
5. In the *General tab* of the pop-up window, select **Benefit Type** from the *Item Type* dropdown.
6. Select a **Benefit Type**.
7. Add the **Direct Cost**.
8. Check the **Exclude From Match checkbox** as necessary. This option will not be available if the category match requirements are set to *Disable* or *Require*.
9. Check the **Exclude From Indirect checkbox** as necessary. This option will not be available if the category indirect requirements are set to *Disable* or *Require*.
10. Select the **Responsible Individual**. This list pulls from *Contacts>Staff*.
11. Add a **Description** (optional).
12. Click **Lock** to prevent line item from being edited (optional).



13. Click **Create**.

## How To Add Financial Information to a Grant Budget Line Item



The *Financials tab* allows users to add more detail to the direct cost and matching planned amounts, and to associate GL accounts with the line item. Users may allocate line items across grant years or months. Line items are allocated evenly by month across the line item life unless unevenly spread.



1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Financial>Budget**.
4. Click the (**Edit icon**) next to a line item.



5. In the pop-up window, open the **Financials tab**.
6. Add the **Cash Match Amount**, **In-Kind Match Amount**, and **Other Funding** in dollars or percentages.

Cash Match Amount	\$	0.00	%
In Kind Match Amount	\$	0.00	%
Other Funding Amount	\$	0.00	%


7. Select a **GL account**. This list pulls from *Administration>Lists>GL Accounts*.
8. Click **Add**. You can add multiple GL accounts if necessary.
9. Select if you wish to view your allocations **Yearly** or **Monthly**.
10. Add **allocation amounts**. Click the  (**Clear icon**) to remove all selections. Click the  (**Spread Evenly icon**) to spread amounts equally over the grant's months.

		
Grant Year	Start Year	Amount

11. Click **Save**.

## How To Add Benefits Information to a Grant Personnel Budget Line Item

Prerequisites: Must be a personnel line item where benefits are planned on a per-staff member basis. Benefit type must be added in the grant's budget settings.


1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Financial>Budget**.
4. Click the  (**Edit icon**) next to a line item.

Additional Tackle				\$
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5. In the pop-up window, open the **Benefits tab**.
6. Select the **Supported Benefit Type**. This list pulls from the *Post-Award tab>Settings>Budget Settings*.
7. Click **Add**. You can add multiple benefit types if necessary.
8. Add the benefit **Amount** in dollars or percentages.
9. Check **Exclude From Match** and **Exclude From Indirect checkboxes** as necessary.
10. Click **Save**.

## How To Add an Expense Cap to a Grant Budget Line Item


Category and line item expense caps are independent of each other, and can be created on a per-line item basis.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Financial>Budget**.
4. Click the  (**Edit icon**) next to a line item.

5. In the pop-up window, open the **Configuration tab**.
6. Add the **Expense Cap**. This will prevent expenses within a line item from exceeding the capped amount.
7. Check the **Do not allow expenses to exceed checkbox** as necessary. If selected, expenses cannot be imported or added over the cap amount.
8. Click **Save**.

## How To Add Spending Alerts to a Grant Budget Line Item

Category and line item spending alerts are independent of each other, and can be created on a per-line item basis. Spending alerts will notify the Grant Manager if a line item is under- or overspent for the monthly allocation or throughout the life of the grant.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Financial>Budget**.
4. Click the  (**Edit icon**) next to a line item.
5. In the pop-up window, open the **Configuration tab**.

### Spending Alerts

6. Check the **Enable Monthly Spending Alerts checkbox** to add monthly spending alerts. Spending alerts will notify the Grant Manager if a line item is under- or overspent for monthly allocation.
  - a. Add **under budget amount** in dollars or percentage (optional).
  - b. Add **over budget amount** in dollars or percentage (optional).

Under the monthly allocated budget by more than	<input type="text" value="0.00 %"/>	Dollar	Percentage 
Over the monthly allocated budget by more than	<input type="text" value="0.00 %"/>	Dollar	Percentage 

7. Check the **Enable Total Spending Alerts checkbox** to add spending alerts for the life of the grant. Spending alerts will notify the Grant Manager if a line item is within a designated percentage of the total line item budget.
  - a. Add **threshold percentage** (in decimal format).

Send weekly alerts when total spending for this line item is...	
Within X percentage of total line item budget	<input type="text" value="0.00 %"/>

8. Click **Save**.

## How To Add an Attachment to a Grant Budget Line Item

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Financial>Budget**.
4. Click the **✎ (Edit icon)** next to a line item.
5. In the pop-up window, open the **Attachments tab**.
6. Click **Choose a File** to select a file from your computer.
7. Click the **+ (Add icon)** to add additional attachments as needed.
8. Click **Save**.

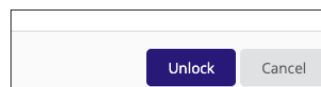
## How To Unlock a Grant Budget Line Item

Prerequisite: Must be Organizational Administrator, Department Admin, or Grant Manager

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Financial>Budget**.
4. Click the **✎ (Edit icon)** next to a locked line item.



5. In the pop-up window, click **Unlock**.



6. Click **Save**.

## How To Edit a Grant Budget Line Item

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Financial>Budget**.
4. Click the **✎ (Edit icon)** next to a line item.



5. Update the information as necessary.
6. Click **Save**.

## How To Delete a Grant Budget Line Item

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Financial>Budget**.
4. Click the **🗑️ (Delete icon)** next to a line item.

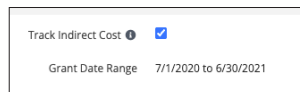


5. In the confirmation pop-up window, click **Delete**.

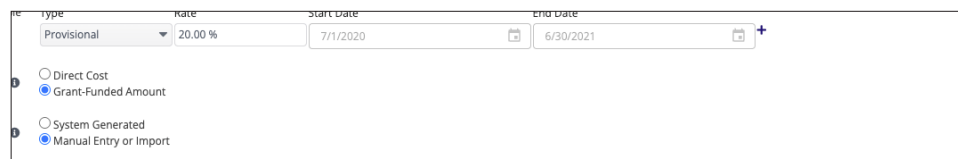
## How To Add Indirect to a Grant Budget

Indirect, or overhead, calculates and tracks costs associated indirectly with the grant. On the budget, indirect is system calculated only; the amount cannot be edited by the user. Indirect cost is calculated as the indirect rate of allocations of budget line items that generate indirect. Indirect will appear as a locked category with an Indirect Cost line item.


1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Settings>Budget Settings**.
4. Click the **✎ (Edit icon)** in the *Icon Bar*.
5. In the *Indirect* section, check the **Track Indirect Cost checkbox**. If checked, an indirect cost category will appear in the grant's Expense Budget which cannot be edited.

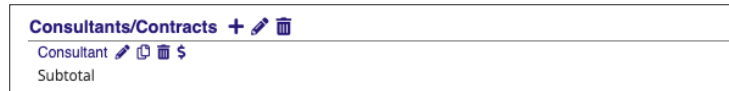


6. Select a **Rate Type**.
7. Add the **Indirect Rate** (in decimal format).
8. Select the **Start Date** and **End Date**.
9. Click the **+ (Add icon)** to add additional indirect cost rates.



10. If Match is enabled, select the how indirect should be calculated on the *Calculate Indirect By* field.
  - **Direct Cost:** Match is included when calculating indirect
  - **Grant-Funded Amount:** Match is excluded when calculating indirect
11. On the *Add Indirect Expenses By* field, select how indirect expenses will be added by default.

- **System Generated:** Indirect expenses will be automatically created when expenses are added against line items that generate indirect.
  - **Manual Entry or Import:** Indirect expenses will be added or imported by users.
12. Open the **Post-Award tab>Financial>Budget**.
  13. Click the  (**Edit icon**) next to a line item within a category that has indirect cost enabled.




14. In the pop-up window, open the **Configuration tab**.
15. Check the **Generates Indirect checkbox**. The generated indirect amount will be added to the *Indirect Cost* line item.



## How To Import Grant Budget Line Items

Organizational Administrators and Grant Managers can import multiple budget line items using the [Budget Import Template Budget Import Template](#) (recommended) or their own Excel file. The Budget Import Template includes the Grant ID, Line Item ID, Line Item Type\*, Budget Category\*, Benefit Type, Name\*, Description, GL Account IDs, GL Name, GL codes, Responsible Staff\*, Direct Cost\*, Project Line Item, Exclude From Match, Generates Indirect, Cash Match Value, Cash Match Type, In-Kind Match Value, In-Kind Match Type, Other Funding Value, Other Funding Type, Personnel Staff, and Personnel Title fields. Required fields have asterisks (\*) next to their names.


1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Financial>Budget**.
4. Click the  (**Import icon**) in the *Icon Bar*.
5. In the pop-up window, click **Choose a file** to select a file from your computer.
6. Select the **Destination** field for each Source column. If you are using the [Budget Import Template Budget Import Template](#) (recommended), the source and destination fields should match.
7. Click **Import**.

## How To Import Grant Budgets

## Note

The GL Code, GL Name, GL Class 1, and GL Class 2 must **exactly match** what is in *Administration>Lists>GL Accounts*. If you have defined your GL Accounts, you must ensure that the column headers and number of columns match what you have defined in *Administration>License Information>Settings tab*. The Responsible Staff and Personnel Staff names must **exactly match** what is in *Contacts>Staff*

Organizational Administrators can import multiple budgets using the [Budget Import Template Budget Import Template](#) (recommended) or their own Excel file. The Budget Import Template includes the Grant ID, Line Item ID, Line Item Type\*, Budget Category\*, Benefit Type, Name\*, Description, GL Account IDs, GL Name, GL codes, Responsible Staff\*, Direct Cost\*, Project Line Item, Exclude From Match, Generates Indirect, Cash Match Value, Cash Match Type, In-Kind Match Value, In-Kind Match Type, Other Funding Value, Other Funding Type, Personnel Staff, and Personnel Title fields. Required fields have asterisks (\*) next to their names.

1. Open **Grant Management>Grants>All Grants**.
2. Click the  (**Import icon**) in the *Icon Bar*.
3. In the pop-up window, select **Budget Import** from the *Choose Import* dropdown.
4. In the *Award Type* dropdown, select **Post-Award**.
5. Select to *Identify Grant by grant ID* or **Unique Identifier**.
6. In the pop-up window, click **Choose a file** to select a file from your computer.
7. Select the **Destination** field for each Source column. If you are using the [Budget Import Template Budget Import Template](#) (recommended), the source and destination fields should match.
8. Click **Import**.

## Note



The GL Code, GL Name, GL Class 1, and GL Class 2 must **exactly match** what is in *Administration>Lists>GL Accounts*. If you have defined your GL Accounts, you must ensure that the column headers and number of columns match what you have defined in *Administration>License Information>Settings tab*. The Responsible Staff and Personnel Staff names must **exactly match** what is in *Contacts>Staff*

## How To Add Expenses Against a Grant Line Item

Prerequisite: Must be an Organizational Admin, Department Admin, Grant Manager, Additional Staff, or Responsible Individual; Grant must allow manual entry for GL Actuals on Grant Details page

Expenses are charges spent against a planned grant budget line item. If an expense exceeds a line item's spending alert, the Grant Manager will receive an email notification. If an expense exceeds a line item's expense cap, it cannot be added. Expenses can also be imported in *Administration>Actuals>Expenses*.

For more information on expenses, see the [AmpliFund Activity Management Guide Euna Grants Activity Management Guide](#) or [AmpliFund Administration Guide Euna Grants Administration Guide](#).

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Financial>Budget**.
4. Click the  (**Expenses icon**) next to a line item.
5. Click the  (**Create icon**) under *Actions*.



6. Add the **Direct Cost** or **Salary** amount.
7. Check the **Exclude From Match checkbox** if necessary.
8. Select an **Expense Date**.
9. Select the **Expense Status**.
  - **New:** A new expense
  - **Matched:** The expense has been added both manually and imported, a possible duplicate
  - **Reviewed:** The expense has been reviewed
  - **Payment Requested:** The expense has been invoiced to the funder
  - **Paid:** The expense has been paid by the funder
  - **Denied:** The expense has been denied by the funder
10. Select **Payee type** and **Payee**, or **Create New** payee and add **Payee** name. The payee is the entity that received the expense funds in exchange for services or goods. This can only be edited by the grant recipient.
11. Add a **Description** (optional).
12. Click **Save**.

-- OR --

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Financial>Expenses**.

## Expenses

4. Click the **+** (**Create icon**) under *Actions*.



5. In the pop-up window, select a **Category**.
6. Select a **Line Item**.
7. Add the **Direct Cost** or **Salary** amount.
8. Check the **Exclude From Match checkbox** if necessary.
9. Select an **Expense Date**.
10. Select the **Expense Status**.
  - **New:** A new expense
  - **Matched:** The expense has been added both manually and imported, a possible duplicate
  - **Reviewed:** The expense has been reviewed
  - **Payment Requested:** The expense has been invoiced to the funder

- **Paid:** The expense has been paid by the funder
  - **Denied:** The expense has been denied by the funder
11. Select **Payee type** and **Payee**, or **Create New** payee and add **Payee** name. The payee is the entity that received the expense funds in exchange for services or goods.
  12. Add a **Description** (optional).
  13. Click **Save**.

## How To Add Grant Indirect Expenses

Prerequisite: Must be an Organizational Admin, Department Admin, Grant Manager, Additional Staff, or Responsible Individual; Grant must allow manual entry for GL Actuals on Grant Details page

### Note

Depending on your account settings, this record type may have additional custom fields or sections.

Indirect expenses are charges spent against a grant's planned indirect cost. If an expense exceeds a line item's spending alert, the Grant Manager will receive an email notification. Indirect expenses can also be imported in *Administration>Actuals>Expenses*, or system-generated.

For more information on expenses, see the [AmpliFund Activity Management Guide](#) or [AmpliFund Administration Guide](#) .

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Financial>Budget**.
4. Click the **\$ (Expenses icon)** next to the Indirect Cost line item.



5. Click the **+ (Create icon)** under *Actions*.



6. Add the **Direct Cost** amount.
7. Check the **Exclude From Match checkbox** if necessary.
8. Select an **Expense Date**.
9. Select the **Expense Status**.
  - **New:** A new expense
  - **Matched:** The expense has been added both manually and imported, a possible duplicate
  - **Reviewed:** The expense has been reviewed
  - **Payment Requested:** The expense has been invoiced to the funder
  - **Paid:** The expense has been paid by the funder

- **Denied:** The expense has been denied by the funder

10. Add a **Description** (optional).

11. Click **Save**.

-- OR --

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Financial>Expenses**.

## Expenses

4. Click the **+** (**Create icon**) under *Actions*.



5. In the pop-up window, select the **Indirect Category**.

6. Add the **Direct Cost** amount.

7. Check the **Exclude From Match checkbox** if necessary.

8. Select an **Expense Date**.












9. Select the **Expense Status**.

- **New:** A new expense
- **Matched:** The expense has been added both manually and imported, a possible duplicate
- **Reviewed:** The expense has been reviewed
- **Payment Requested:** The expense has been invoiced to the funder
- **Paid:** The expense has been paid by the funder
- **Denied:** The expense has been denied by the funder

10. Add a **Description** (optional).

11. Click **Save**.

## Icons

-  Print
-  Help
-  Create
-  Grant Performance Plan Report
-  Save Current View
-  Import
-  Export
-  Edit
-  Copy
-  Delete
-  Achievements

## Note

Depending on your account settings, this record type may have additional custom fields or sections.

# Performance

A grant's performance is measured by achievements against programmatic goals. If achievements are not meeting their given goal allocations, the grant's performance risk may be impacted.

The Performance Plan list shows the *Name*, *Goal Type*, *Responsible Individual*, and *Strategy* columns by default. In addition, the following columns may be shown: *Status*, *Created By*, *Created Date*, *Modified By*, and *Modified Date*. Each of these columns may be shown or hidden, sorted, or filtered. See the [Euna Grants User Interface Navigation Guide](#) to learn more.

## How To Add a Grant Performance Goal

When creating a new goal, the fields may vary depending on the goal type. For an extensive description of goal types, see [Goal Types](#)

Prerequisite: Must be Organizational Administrator, Department Admin, or Grant Manager and have performance plan creation permissions as set by the funding organization in Euna Grants

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Performance>Performance Plan**.
4. Click the **+** (**Create icon**) in the *Icon Bar*.
5. In the pop-up window, select a **Strategy** (optional). This will link the goal to an existing strategy.
6. Select a **Goal Type**. This could be [Milestone](#), [Narrative](#), [Numeric](#), [Percent Achieved](#), [Percent Changed](#), or [Reimbursement](#).
7. Add the goal information.
8. Click **Save**.

## How To Add a **Milestone** Grant Performance Goal

Milestone goals are the most basic goal type. They allow for tracking progress as a "Yes" or "No" response by the Responsible Individual. An example of a milestone goal is "Create and send Q1 Staff Survey."

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Performance>Performance Plan**.
4. Click the **+** (**Create icon**) in the *Icon Bar*.
5. In the pop-up window, select a **Strategy** (optional). This will link the goal to an existing strategy.

6. In the *Goal Type* dropdown, select **Milestone**.

7. Add the goal **Name**.

8. Add the goal **Description** (optional).

9. Select the **Responsible Type**.

- a. If *Individual*, select the **Responsible Individual**. This list pulls from *Contacts>Staff* for your organization or the recipient's organization (if on an award record). The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.
- b. If *Sub-Recipient*, select the **Responsible Sub-Recipient**. This list pulls from *Contacts>Sub-Recipients*. Notifications are sent to the recipient grant manager by default, who can then reassign the performance goal to a Responsible Individual in their organization.

10. For clients with *Project*, select a **Project Goal** (optional). This links a project goal to the performance goal.

11. Select a goal **Due Date**.

12. Click **Create**.

## Note

Selecting **Sub-Recipient** will delegate the performance goal to a sub-recipient. Therefore, it is not available on award or sub-award performance goals which must be assigned to an individual from the recipient organization.

## How To Add a Grant **Narrative** Performance Goal

Narrative goals are question and answer goals. Responsible Individuals 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. Open **Grant Management>Grants>All Grants**.

2. Click a **grant name**.

3. Open the **Post-Award tab>Performance>Performance Plan**.

4. Click the **+** (**Create icon**) in the *Icon Bar*.

5. In the pop-up window, select a **Strategy** (optional). This will link the goal to an existing strategy.

6. In the *Goal Type* dropdown, select **Narrative**.

7. Add the goal **Name**.

8. Add the goal **Description** (optional).

9. Select the **Responsible Type**.

- a. If *Individual*, select the **Responsible Individual**. This list pulls from *Contacts>Staff* for your organization or the recipient's organization (if on an award record). The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.
- b. If *Sub-Recipient*, select the **Responsible Sub-Recipient**. This list pulls from *Contacts>Sub-Recipients*. Notifications are sent to the recipient grant manager by default, who can then reassign the performance goal

## Note

Selecting **Sub-Recipient** will delegate the performance goal to a sub-recipient. Therefore, it is not available on award or sub-award performance goals which must be assigned to an individual from the recipient organization.

to a Responsible Individual in their organization.

10. For clients with *Project*, select a **Project Goal** (optional). This links a project goal to the performance goal.
11. Add the **Question** that the goal will answer.
12. Click **Create**.

## How To Add a Grant **Numeric** Performance Goal

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

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Performance>Performance Plan**.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. In the pop-up window, select a **Strategy** (optional). This will link the goal to an existing strategy.
6. In the *Goal Type* dropdown, select **Numeric**.
7. Add the goal **Name**.
8. Add the goal **Description** (optional).
9. Select the **Responsible Type**.
  - a. If *Individual*, select the **Responsible Individual**. This list pulls from *Contacts>Staff* for your organization or the recipient's organization (if on an award record). The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.
  - b. If *Sub-Recipient*, select the **Responsible Sub-Recipient**. This list pulls from *Contacts>Sub-Recipients*. Notifications are sent to the recipient grant manager by default, who can then reassign the performance goal to a Responsible Individual in their organization.

### Note

Selecting **Sub-Recipient** will delegate the performance goal to a sub-recipient. Therefore, it is not available on award or sub-award performance goals which must be assigned to an individual from the recipient organization.

10. For clients with *Project*, select a **Project Goal** (optional). This links a project goal to the performance goal.
11. Add the **Number To Be Achieved**.
12. Click **Create**.

## How To Add a Grant **Percent Achieved** Performance Goal

Percent achieved goals are goals to reach a desired percent. When tracking

progress against a percent achieved goal, Responsible Individuals 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. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Performance>Performance Plan**.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. In the pop-up window, select a **Strategy** (optional). This will link the goal to an existing strategy.
6. In the *Goal Type* dropdown, select **Percent Achieved**.
7. Add the goal **Name**.
8. Add the goal **Description** (optional).
9. Select the **Responsible Type**.
  - a. If *Individual*, select the **Responsible Individual**. This list pulls from *Contacts>Staff* for your organization or the recipient's organization (if on an award record). The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.
  - b. If *Sub-Recipient*, select the **Responsible Sub-Recipient**. This list pulls from *Contacts>Sub-Recipients*. Notifications are sent to the recipient grant manager by default, who can then reassign the performance goal to a Responsible Individual in their organization.
10. For clients with *Project*, select a **Project Goal** (optional). This links a project goal to the performance goal.
11. Add the **Percent Desired**.
12. Click **Create**.

### Note

Selecting **Sub-Recipient** will delegate the performance goal to a sub-recipient. Therefore, it is not available on award or sub-award performance goals which must be assigned to an individual from the recipient organization.

## How To Add a Grant **Percent Changed** Performance Goal

Percent changed goals are goals to track a percent increase or decrease. Percent changed goals are defined with a starting percent and a desired percent. When tracking progress against a percent changed goal, Responsible Individuals 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. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Performance>Performance Plan**.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. In the pop-up window, select a **Strategy** (optional). This will link the goal to

an existing strategy.

6. In the *Goal Type* dropdown, select **Percent Changed**.
7. Add the goal **Name**.
8. Add the goal **Description** (optional).
9. Select the **Responsible Type**.
  - a. If *Individual*, select the **Responsible Individual**. This list pulls from *Contacts>Staff* for your organization or the recipient's organization (if on an award record). The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.
  - b. If *Sub-Recipient*, select the **Responsible Sub-Recipient**. This list pulls from *Contacts>Sub-Recipients*. Notifications are sent to the recipient grant manager by default, who can then reassign the performance goal to a Responsible Individual in their organization.
10. For clients with *Project*, select a **Project Goal** (optional). This links a project goal to the performance goal.
11. Add the **Current Percent** and **Percent Desired**.
12. Click **Create**.

### Note

Selecting **Sub-Recipient** will delegate the performance goal to a sub-recipient. Therefore, it is not available on award or sub-award performance goals which must be assigned to an individual from the recipient organization.

## How To Add a Grant **Reimbursement** Performance 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, Responsible Individuals may enter Units Achieved. 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. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Performance>Performance Plan**.
4. Click the **+** (**Create icon**) in the *Icon Bar*.
5. In the pop-up window, select a **Strategy** (optional). This will link the goal to an existing strategy.
6. In the *Goal Type* dropdown, select **Reimbursement**.
7. Check the **Add as Budget Line Item checkbox** to add the goal to the grant's expense budget.
8. Add the goal **Name**.

### Note

If selected, any changes to the goal will be automatically reflected in the grant's budget


**Note**

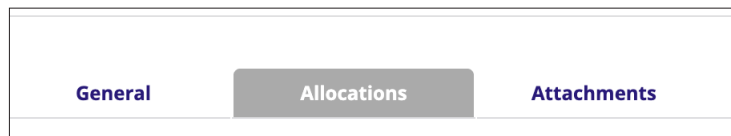
Selecting **Sub-Recipient** will delegate the performance goal to a sub-recipient. Therefore, it is not available on award or sub-award performance goals which must be assigned to an individual from the recipient organization.



9. Add the goal **Description** (optional).
10. Select the **Responsible Type**.
  - a. If *Individual*, select the **Responsible Individual**. This list pulls from *Contacts>Staff* for your organization or the recipient's organization (if on an award record). The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.
  - b. If *Sub-Recipient*, select the **Responsible Sub-Recipient**. This list pulls from *Contacts>Sub-Recipients*. Notifications are sent to the recipient grant manager by default, who can then reassign the performance goal to a Responsible Individual in their organization.
11. For clients with *Project*, select a **Project Goal** (optional). This links a project goal to the performance goal.
12. Add the **Rate Per Achievement** in dollars.
13. Add the **Number To Be Achieved**.
14. Click **Create**.

## How To Add Allocations to a Grant Performance Goal

Narrative, Numeric, Percent Achieved, Percent Changed, and Reimbursement goals allow you to add allocations. Allocations help you plan your goals by year or month.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Performance>Performance Plan**.
4. Click the  (**Edit icon**) next to a goal name.
5. In the pop-up window, open the **Allocations tab**.



6. Select if you wish to view your allocations **Yearly** or **Monthly**.
7. Add **allocation amounts**. Click the  (**Clear icon**) to remove all selections. Click the  (**Spread Evenly icon**) to spread amounts equally over the grant's months.




8. Click **Save**.

**Note**

If selected, any changes to the goal will be automatically reflected in the grant's budget.

## How To Add an Attachment to a Grant Performance Goal

All goals allow you to add an attachment.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Performance>Performance Plan**.
4. Click the  (**Edit icon**) next to a goal name.



5. In the pop-up window, open the **Attachments tab**.



6. Click **Choose a file** to select a file from your computer.
7. Click the **+** (**Add icon**) to add additional files (optional).




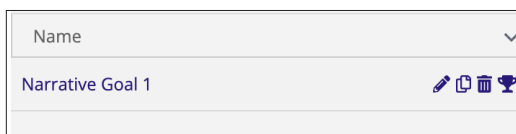
8. Click **Save**.

### Note

Once a goal has been created with a specific goal type selected, the goal type cannot be changed.

## How To Edit a Grant Performance Goal


1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Performance>Performance Plan**.
4. Click the  (**Edit icon**) next to a goal name.







5. Update the information as necessary.
6. Click **Save**.

## How To Copy a Grant Performance Goal


1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.

3. Open the **Post-Award tab>Performance>Performance Plan**.
4. Click the  (**Copy icon**) next to a goal name.

Name	▼
Narrative Goal 1	   

5. Update the information as necessary.
6. Click **Save**.

## How To Delete a Grant Performance Goal

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Performance>Performance Plan**.
4. Click the  (**Delete icon**) next to a goal name.

Name	▼
Narrative Goal 1	   


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

## How To Import Grant Performance Goals

### Note

The Individual name must **exactly match** what is in *Contacts>Staff*.

Users can import multiple goals using the [Performance Plan Import Template](#) (recommended) or their own Excel file. The Performance Plan Import Template includes the Grant, Goal Unique ID, Goal Type\*, Name\*, Description, Individual\*, Question, Number To Be Achieved, Current Percentage, Desired Percentage, Rate Per Unit, Due Date, and Add as Budget Line Item fields. Required fields have asterisks (\*) next to their names.


1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Performance>Performance Plan**.
4. Click the  (**Import icon**) in the *Icon Bar*.
5. In the pop-up window, click **Choose a file** to select a file from your computer.
6. Select the **Destination** field for each Source column. If you are using the [Performance Plan Import Template](#) (recommended), the source and destination fields should match.
7. Click **Import**.

## How To Import Grant Performance Plans

### Note

The Individual name must **exactly match** what is in *Contacts>Staff*.

Users can import multiple performance plans using the [Performance Plan Import Template](#) (recommended) or their own Excel file. The Performance Plan Import Template includes the Grant, Goal Unique ID, Goal Type\*, Name\*, Description, Individual\*, Question, Number To Be Achieved, Current Percentage, Desired Percentage, Rate Per Unit, Due Date, and Add as Budget Line Item fields. Required fields have asterisks (\*) next to their names.


1. Open **Grant Management>Grants>All Grants**.
2. Click the  (**Import icon**) in the *Icon Bar*.
3. In the pop-up window, select **Performance Plan Import** from the *Choose Import* dropdown.
4. In the *Award Type* dropdown, select **Post-Award**.
5. Select to *Identify Grant by* grant **ID** or **Unique Identifier**.
6. In the pop-up window, click **Choose a file** to select a file from your computer.
7. Select the **Destination** field for each Source column. If you are using the [Performance Plan Import Template](#) (recommended), the source and destination fields should match.
8. Click **Import**.

### Note

Depending on your account settings, this record type may have additional custom fields or sections.

## How To Add a Grant Performance Strategy


Strategies link related goals together.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Performance>Performance Strategies**.
4. Click the  (**Create icon**) in the *Icon Bar*.
5. In the pop-up window, add a strategy **Name**.
6. Add a **Description** (optional).
7. Click **Create**.

## How To Edit a Grant Performance Strategy

After strategies have been added, the name and description may be edited.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.


- Open the **Post-Award tab>Performance>Performance Strategies**.
- Click the  (**Edit icon**) next to a strategy name.



- Update the information as necessary.
- Click **Save**.

## How To Delete a Grant Performance Strategy


Prerequisite: Strategy cannot be linked to a performance goal

- Open **Grant Management>Grants>All Grants**.
- Click a **grant name**.
- Open the **Post-Award tab>Performance>Performance Strategies**.
- Click the  (**Delete icon**) next to a strategy name.



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

## How To Link a Grant Performance Strategy to a Goal

- Open **Grant Management>Grants>All Grants**.
- Click a **grant name**.
- Open the **Post-Award tab>Performance>Performance Plan**.
- Click the  (**Edit icon**) next to a goal name.



- In the pop-up window, select a **Strategy** (optional). This will link the goal to an existing strategy.
- Click **Save**.


### Note

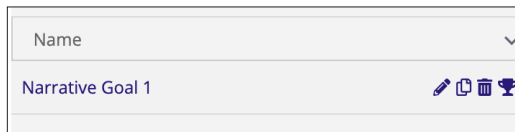
Depending on your account settings, this record type may have additional custom fields or sections.

## How To Add Achievements Against a Grant Goal

Prerequisite: Must be an Organizational Admin, Department Admin, Grant Manager, Additional Staff, or Responsible Individual

For more information on achievements, see the [Euna Grants Activity Management Guide](#).

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Performance>Performance Plan**.
4. Click the  (**Achievements icon**) next to a goal name.









5. Click the **+** (**Create icon**) in the *Icon Bar*.
6. Add **Achievement Date**.
7. Add achievement information.
8. Click **Save**.

--OR--

1. Open **Activity>Achievements**.
2. Click the **+** (**Add icon**) next to the achievement name.
3. Add **Achievement Date**.
4. Add achievement information.
5. Click **Save**.

## Icons

-  Print
-  Help
-  Create
-  Edit
-  Delete
-  Export to PDF


## Note

Depending on your account settings, this record type may have additional custom fields or sections.

# Cash Flow

The Cash Flow section of the Post-Award tab holds payment requests, payment authorizations, and cash receipts. Payment requests allow grant recipients to invoice grant funding organizations for expenses accrued (reimbursement) or anticipated (cash advance) during the life of the grant. For clients with funders in Euna Grants, payment requests can be submitted directly to the funder for review and approval. Grantors can create payments authorization to track payment approval and issue to the recipient. Grantees and recipients can create cash receipts to track received payments from the funder.

## How To Add a Payment Request

Payment requests can be created independently, or directly from closed tracking or reporting periods by clicking the  (**Payment Request icon**) next to a period name on *Post-Award tab>Management>Tracking Periods* or *>Reporting Periods*. The fields available may vary depending on your account status as a recipient or standalone client.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Cash Flow>Payment Requests**.
4. Click the **+** (**Create icon**) in the *Icon Bar*.

## Payment Request Information

5. Update the **Payment Request Name** as necessary. The payment request name defaults to show grant name and date created.
6. Add **Date Created**.
7. If available, select **Related Tracking/Reporting Period(s)** to include (optional). The expenses in the closed period will populate the totals in the *Financial Detail* section.
8. If available, select **Expenses From** and **To** dates. Any expenses that fall into those dates that are not already attached to a payment request will populate the totals in the *Financial Detail* section.
9. Select **Payment Type**.
  - **Reimbursement:** Request payment for costs accrued
  - **Advance:** Request payment for anticipated expenses
10. Select a **Payment Request Status**.
  - **Not Submitted:** Payment request has not been submitted to the funder
  - **Submitted:** Payment request has been submitted to the funder
  - **Approved:** Payment request has been approved by the funder
  - **Rejected:** Payment request has been rejected by the funder

- **Paid:** Payment has been received

11. If payment request has been submitted, add **Date Submitted** (optional).

## Financial Detail

12. To create a new expense, click **Create a New Expense +**. This will create a new expense in a *Reviewed* status.

13. To view category details, click the **category name**. This shows the reviewed expenses in the closed tracking or reporting period, or from the dates selected.

14. Add **Requested Amount**.

15. If payment request has been *Approved*, add the **Approved Amount**.

## Additional Information


16. Add **Comments** (optional). These will be visible to the funder.

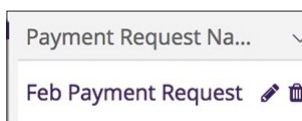
17. Click **Choose file(s)** to add attachments (optional).

18. Click **Create** or **Submit** to send to the funder.

## How To Edit a Payment Request

Prerequisite: Payment request cannot be submitted to a funder in Euna Grants

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Cash Flow>Payment Requests**.
4. Click the  (**Edit icon**) next to a payment request name.




5. Update the information as necessary.

6. Click **Save**.

## How To Delete a Payment Request

Prerequisite: Payment request cannot be submitted to a funder in Euna Grants

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Cash Flow>Payment Requests**.
4. Click the  (**Delete icon**) in the next to a payment request.
5. In the confirmation pop-up window, click **Delete**.

## How To Approve a Payment Request

### ! Note

The expense must be in a *Reviewed* status and within the **Expenses From** and **To** dates in order for it to appear on the payment request.

### ! Note


The Remaining amount for each category and line item shows the remaining grant funded amounts. This calculation includes approved and pending expenses.

### ! Note

Once the payment request is submitted, you can no longer edit the payment request.

### For funder clients

Funding organizations can approve (wholly or partially) or reject payment requests from recipients.

1. Open **Activity>Payment Request Approvals**.
2. Click a **grant name**.
3. Click the  (**Edit icon**) next to a payment request name.

### Financial Details

4. To create a new expense, click **Create a New Expense +**. This will create a new expense in a *Reviewed* status.
5. To view category details, click the **category name**. This shows the reviewed expenses in the closed tracking or reporting period, or from the dates selected.
6. Update **Approved Amount** as necessary. This defaults to the *Requested Amount*.
7. Add **Comments** (optional). These will be visible to the recipient.
8. Click **Approve** to send your response to the recipient. Once approved, only Organizational Admin will be able to edit the payment request.




9. In the confirmation pop-up window, enter **APPROVE** and click **Approve**.

## How To Reject a Payment Request

### For funder clients

Funding organizations can approve (wholly or partially) or reject payment requests from recipients.

1. Open **Activity>Payment Request Approvals**.
2. Click a **grant name**.
3. Click the  (**Edit icon**) next to a payment request name.

### Costs

4. To view category details, click the **category name**. This shows the reviewed expenses in the closed tracking or reporting period, or from the dates selected.
5. Add **Comments** (optional). These will be visible to the recipient.
6. Click **Reject** to send your response to the recipient. The *Approved Amount* will automatically update to \$0.00 upon rejection. Once rejected, you will no longer be able to edit the payment request.

### Note

Funder must have expense creation permissions. The expense must be in a *Reviewed* status and within the **Expenses From** and **To** dates in order for it to appear on the payment request.




7. In the confirmation pop-up window, enter **REJECT** and click **Reject**.

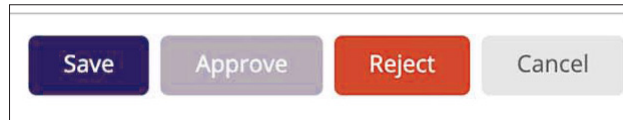
## How To Edit an Approved Payment Request

### **For funder clients**

Prerequisite: Must be an Organizational Admin

Once a payment request has been approved, funder Organizational Admin can edit Approved Amount and Internal and External Comments. Changes to the payment request will be captured in the Payment Request History.

1. Open **Grant Management>Grants Awarded**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Cash Flow>Payment Requests**.
4. Click the  (**Edit icon**) next to an approved payment request name.
5. Update information as necessary.
6. Click **Save**.




7. In the confirmation pop-up window, add **Reason for Edit** (optional) and click **Save**.

## How To Reject an Approved Payment Request

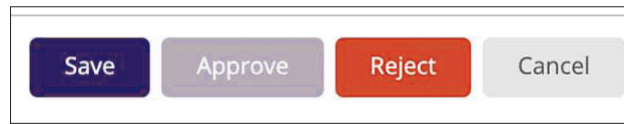
### **For funder clients**

Prerequisite: Must be an Organizational Admin and no payment authorizations can be attached to the payment request

Once a payment request has been approved, funder Organizational Admin can reject it.

1. Open **Grant Management>Grants Awarded**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Cash Flow>Payment Requests**.
4. Click the  (**Edit icon**) next to an approved payment request name.
5. Update information as necessary.
6. Click **Reject** to send your response to the recipient. The *Approved Amount* will automatically update to \$0.00 upon rejection. Once rejected, you will no

longer be able to edit the payment request.



- In the confirmation pop-up window, enter **REJECT** and click **Reject**.

### **!** Note

Depending on your account settings, this record type may have additional custom fields or sections.

## How To Add a Payment Authorization **For funder clients**

Once a payment request has been approved, the funder can create a payment authorization to track the approval and payment. The recipient organization will not have insight into a funder's payment authorizations. Payment authorizations can be created from the *Post-Award tab>Cash Flow>Payment Authorizations* or directly from the payment request.

- Open **Grant Management>Grants Awarded**.
- Click a **grant name**.
- Open the **Post-Award tab>Cash Flow>Payment Authorizations**.
- Click the **+** (**Create icon**) in the *Icon Bar*.
- Add payment authorization **Name**.
- Select **Payment Status**.
- Add **Related Payment Request(s)** (optional).
- Select **Authorization Date**.
- Select **Authorized By** staff member. This list pulls from *Contacts>Staff*.
- Add internal **Comments** (optional).

## Invoice Details

- Select **Document Type**.
  - If *ZU* is selected, add **Document Header Text** (optional).
- Add **Document Date**.
- Add **Baseline Date** and **Service Dates**.
- Add **Pre-Audit Text** (optional).
- Click **Add Line** to add an *Accounting Line*. Additional lines can be added by clicking the **+** (**Add icon**).
  - In the pop-up window, add **Amount Document Currency**.
  - Select **Earmarked Funds**.
    - In the pop-up window, select **Earmarked Funds Document Item**.
    - Add **GL Account**.
    - Select **Fund, Cost Center**, and **Functional Area**.

### **!** Note

The Accounting Line total must equal the amount authorized.

- iv. Add **Internal Order** and **WBS** (optional).
- v. Select **Fund Budget Period** year.

## Payment Information

### **!** Note

This section is only available when the *Payment Status* is **Paid**.

16. Check the **Select Payment Source by Budget Category** checkbox to select the funding source and amount for each budget category on the linked payment request.

**Payment Information**

Select Payment Source by Budget Category

	Amount Paid	Payment Source
Equipment	\$900.00	Community Education Fund
Supplies	\$1,350.00	Community Education Fund
Travel	\$4,500.00	Community Education Fund Fund for Reading Program

17. Add **Amount Paid**.
18. Select **Payment Method**.
19. Select **Payment Date**.
20. Add **Payment Reference** code (optional). This field may be used as reference for your financial system.
21. Add **Payment Notes** (optional).
22. Click **Create**.

### **!** Note

Depending on your account settings, this record type may have additional custom fields or sections.




## How To Add a Cash Receipt

Cash receipts allow grantees to track funder payments against payment requests, as well as other received payments. The funder organization will not have insight into a recipient's cash receipts. Cash receipts can be created from the *Post-Award tab>Cash Flow>Cash Receipts* or directly from the payment request.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Cash Flow>Cash Receipts**.
4. Click the **+** (**Create icon**) in the *Icon Bar*.
5. Add **Receipt Name**.
6. Select a funding **Organization**. This defaults to the grant funder and pulls from *Contacts>Organizations*.
7. Select **Payment Date**.
8. Add payment **Amount**.
9. Select **Payment Method**.
10. Add **Payment Reference Number** (optional).

11. Select a **GL Account** . This list pulls from *Administration>Lists>GL Accounts*.
12. Select a **Relate Payment Request** (optional). This will link the cash receipt to a payment request.
13. Click **Choose a file** to attach a file from your computer (optional).
14. Add **Description** (optional).
15. Click **Create**.

## Icons

-  Print
-  Help
-  Create

# Tracking and Reporting Periods

Tracking and reporting periods allows managers and admin users to track the health and progress of their grants in regularly segmented intervals over the lifetime of the grants. Tracking periods are for internal use; reporting periods are sent to the funder for review. Tracking periods can include expenses, achievements, timesheets, and program income; reporting periods can include expenses and achievements. Grant Managers, Department Admin, and Organizational Administrators can view, create, edit, and close periods. Organizational Administrators can reopen closed periods.

## Note

Depending on your account settings, this record type may have additional custom fields or sections.

## How To Add a Tracking Period

1. Open **Grants Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open **the Post-Award tab>Management>Tracking Period**.
4. Click the **+** (**Create icon**) in the *Icon Bar*.
5. In the pop-up window, select the **types of tracking periods** to include. This could include [Expenses](#), [Achievements](#), [Timesheets](#), and/or [Program Income](#).

What types of tracking periods would you like to include?

- Expenses
- Achievements
- Timesheets
- Program Income

6. Select a **period of time**.
7. Click **Save**.
8. Add tracking period information.
9. Click **Save**.

## How To Add an **Expenses** Tracking Period

**Expenses** 

Achievements 

Timesheets 

Program Income 

From the *Expenses tab*, you can review expense details, view expense analytics, and select expenses to close out in the tracking period.

## Overall Expense Details

**Note**

This section needs to be filled separately for each reporting period type.

**Note**

This section needs to be filled separately for each reporting period type.

1. Add **Comments** (optional).
2. Click **Choose File** to select a file from your computer.

### Grantee Certification

3. Add the **Name of Authorized Individual from Grantee Organization**.
4. Add the **Title of Authorized Individual from Grantee Organization**.
5. Add a contact **Phone Number**.
6. Add a contact **Email Address**.

### Report Transmittal

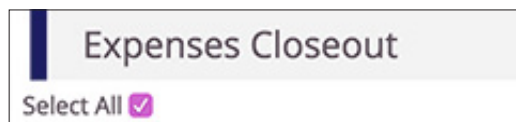
7. Select if this is the **Final Report for Award Period**.
8. Select if **an alternate file or external database is allowed** for grant reporting.
  - a. If Yes, add the **name of the file or database**.
  - b. If Yes, upload required **alternate documentation**.
9. Upload the **initial submission for Periodic Report**.
10. Upload **revised submission(s) for the Periodic Report**.

### Periodic Financial Report

11. Select if there are **no changes or new expenses** from the prior reporting period.
12. Add total **award-to-date Program Income**.
13. Add **Program Income for current reporting period**.
14. Add total **award-to-date Interest Earned**.
15. Add **Interest Earned for current reporting period**.

### Expenses Closeout

16. Select expense **category names** to close out. The Total Amount for the category includes any reviewed expenses for the period. To select all expenses, check the **Select All checkbox**.



**Note**

Once closed, users may not edit any expenses, achievements, timesheets, or program income within the closed tracking period.

17. Click **Save** to save your progress, or **Close** to close the tracking period.

## How To Add an **Achievements** Tracking Period



From the *Achievements tab*, you can review achievement details, view achievement analytics, and select achievements to close out in the tracking period.

## Overall Achievements Details

1. Add **Comments** (optional).
2. Click **Choose File** to select a file from your computer.

### Note

This section needs to be filled separately for each reporting period type.

## Grantee Certification

3. Add the **Name of Authorized Individual from Grantee Organization**.
4. Add the **Title of Authorized Individual from Grantee Organization**.
5. Add a contact **Phone Number**.
6. Add a contact **Email Address**.

### Note

This section needs to be filled separately for each reporting period type.

## Report Transmittal

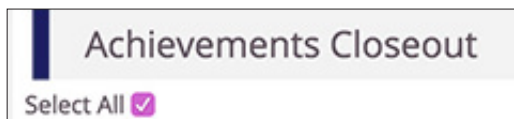
7. Select if this is the **Final Report for Award Period**.
8. Select if **an alternate file or external database is allowed** for grant reporting.
  - a. If Yes, add the **name of the file or database**.
  - b. If Yes, upload required **alternate documentation**.
9. Upload the **initial submission for Periodic Report**.
10. Upload **revised submission(s) for the Periodic Report**.

## Periodic Performance Report

11. Select if **all performance accomplishments are on schedule with performance standards**.
  - a. If *No*, provide an **explanation**.
12. Select if **performance is consistent with grant-to-date expected services and expenditures/earnings**.
  - a. If *No*, provide an **explanation**.

## Achievements Closeout

13. Select **goals** to close out. To select all goals, check the **Select All checkbox**.



14. Click **Save** to save your progress, or **Close** to close the tracking period.

**Note**

Once closed, users may not edit any expenses, achievements, timesheets, or program income within the closed tracking period.

## How To Add a **Timesheets** Tracking Period

### **For clients with Time and Effort Certification**



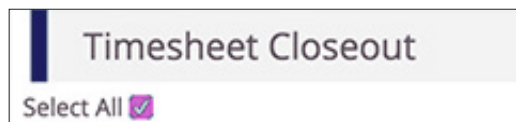
From the *Timesheets tab*, you can review timesheet details and select timesheets to close out in the tracking period.

### **Overall Timesheet Details**

1. Add **Comments** (optional).
2. Click **Choose File** to select a file from your computer.

### **Timesheet Closeout**

3. Select **employees** to close out. To select all goals, check the **Select All checkbox**.



4. Click **Save** to save your progress, or **Close** to close the tracking period.

**Note**

Once closed, users may not edit any expenses, achievements, timesheets, or program income within the closed tracking period.

## How To Add a **Program Income** Tracking Period



### **Overall Program Income Details**

1. Add **income Earned for Period**.
2. Add **Comments** (optional).
3. Click **Choose File** to select a file from your computer.
4. Click **Save** to save your progress, or **Close** to close the tracking period.

**Note**

Once closed, users may not edit any expenses, achievements, timesheets, or program income within the closed tracking period.

## How To Edit a Tracking Period

Prerequisite: Must be an open tracking period

1. Open **Grants Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Management>Tracking Period**.
4. Click a **tracking period start date**.

5. Click the **tabs** to navigate to the different tracking period types.
6. Update the information as necessary.
7. Click **Save** to save your progress.

### **!** Note

Once closed, users may not edit any expenses, achievements, timesheets, or program income within the closed tracking period.

## How To Close a Tracking Period

1. Open **Grants Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Management>Tracking Period**.
4. Click a **tracking period start date**.
5. Click **Close** to close the tracking period.
6. In the confirmation pop-up window, click **Close**.

## How To Open a Tracking Period

Prerequisite: Must be an Organizational Administrator.

1. Open **Grants Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Management>Tracking Period**.
4. Click the **Status** column to sort by status.
5. Click a closed **tracking period start date**.
6. Click **Open** to reopen the tracking period for editing.

### **!** Note

Depending on your account settings, this record type may have additional custom fields or sections.

## How To Add a Reporting Period

Prerequisite: Must be a grant with a funder in Euna Grants

1. Open **Grants Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Management>Reporting Period**.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. In the pop-up window, select the **types of reporting periods** to include. This could include **Expenses** or **Achievements**.

What types of reporting periods would you like to include?

Expenses

Achievements

6. Select a **period of time**.
7. Click **Save**.

## How To Add an **Expenses** Reporting

## Period

Expenses

Achievements

From the *Expenses tab*, you can review expense details, view expense analytics, and select expenses to close out in the reporting period.

### Overall Expense Details

1. Add **Comments** (optional). These will be visible to the funder.
2. Click **Choose File** to select a file from your computer.

#### Note

This section needs to be filled separately for each reporting period type.

### Grantee Certification

3. Add the **Name of Authorized Individual from Grantee Organization**.
4. Add the **Title of Authorized Individual from Grantee Organization**.
5. Add a contact **Phone Number**.
6. Add a contact **Email Address**.

#### Note

This section needs to be filled separately for each reporting period type.

### Report Transmittal

7. Select if this is the **Final Report for Award Period**.
8. Select if **an alternate file or external database is allowed** for grant reporting.
  - a. If Yes, add the **name of the file or database**.
  - b. If Yes, upload required **alternate documentation**.
9. Upload the **initial submission for Periodic Report**.
10. Upload **revised submission(s) for the Periodic Report**.

### Periodic Financial Report

11. Select if there are **no changes or new expenses** from the prior reporting period.
12. Add total **award-to-date Program Income**.
13. Add **Program Income for current reporting period**.
14. Add total **award-to-date Interest Earned**.
15. Add **Interest Earned for current reporting period**.

### Expenses Closeout

16. Select expense **category names** to close out. The Total Amount for the category includes any reviewed expenses for the period. To select all expenses, check the **Select All checkbox**.

Expenses Closeout

Select All

## Warning

Once closed, users may not edit any expenses or achievements within the closed reporting period. The reporting period can only be reopened if rejected by the funder.

- Click **Save** to save your progress, or **Close** to close the reporting period and send to the funder.

## How To Add an **Achievements** Reporting Period



From the *Achievements* tab, you can review achievement details, view achievement analytics, and select achievements to close out in the reporting period.

### Overall Achievements Details

- Add **Comments** (optional). These will be visible to the funder.
- Click **Choose File** to select a file from your computer.

## Note

This section needs to be filled separately for each reporting period type.

### Grantee Certification

- Add the **Name of Authorized Individual from Grantee Organization**.
- Add the **Title of Authorized Individual from Grantee Organization**.
- Add a contact **Phone Number**.
- Add a contact **Email Address**.

## Note

This section needs to be filled separately for each reporting period type.

### Report Transmittal

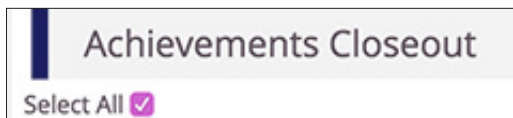
- Select if this is the **Final Report for Award Period**.
- Select if **an alternate file or external database is allowed** for grant reporting.
  - If *Yes*, add the **name of the file or database**.
  - If *Yes*, upload required **alternate documentation**.
- Upload the **initial submission for Periodic Report**.
- Upload **revised submission(s) for the Periodic Report**.

### Periodic Performance Report

- Select if **all performance accomplishments are on schedule with performance standards**.
  - If *No*, provide an **explanation**.
- Select if **performance is consistent with grant-to-date expected services and expenditures/earnings**.
  - If *No*, provide an **explanation**.

### Achievements Closeout

- Select **goals** to close out. To select all goals, check the **Select All checkbox**.



### Warning

Once closed, users may not edit any expenses or achievements within the closed reporting period.

The reporting period can only be reopened if rejected by the funder.

14. Click **Save** to save your progress, or **Close** to close the reporting period and submit to the funder.

## How To Edit a Reporting Period

Prerequisite: Must be an open tracking period

1. Open **Grants Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Management>Reporting Period**.
4. Click a **reporting period start date**.
5. Click the **tabs** to navigate to the different tracking period types.
6. Update the information as necessary.
7. Click **Save**.

### Warning

Once closed, users may not edit any expenses or achievements within the closed reporting period.

The reporting period can only be reopened if rejected by the funder.

## How To Close a Reporting Period

Closing a reporting period will send it to the funder to review.

1. Open **Grants Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Management>Reporting Period**.
4. Click a **reporting period start date**.
5. Click **Close** to close the tracking period.
6. In the confirmation pop-up window, click **Close**.

## How To Reject a Reporting Period

### **For funder clients**

Prerequisite: Reporting period cannot be linked to a payment request











1. Open **Grants Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Management>Reporting Period**.
4. Click an **award name**.
5. Click a **reporting period start date**.

## Record Information

6. Add **Comments** (optional). Check the **Include comments in notification email checkbox** to send comments to the recipient. If this checkbox is not checked, the recipient will not view the comments.

7. Click **Reject** to reject the reporting period and send it back to the recipient for editing.

## Icons

-  Print
-  Help
-  Save Current View
-  Send Email
-  Edit
-  Add
-  Remove
-  Delete
-  Activate
-  Deactivate

### Note

Depending on your account settings, this record type may have additional custom fields or sections.

# Amendments

Amendments allow grant recipients and funding organizations to negotiate changes to an award. Recipients can propose amendments to the award amount, duration, budget categories, or program goals. Funders can review the proposed amendments and approve, deny, or request more information within Euna Grants. Euna Grants facilitates and tracks these interactions.

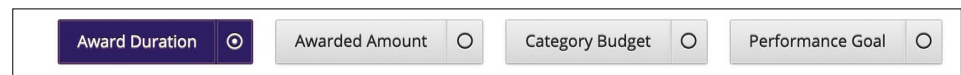
In addition, organizations can record amendments in Euna Grants if their corresponding recipient or funding organization is not in Euna Grants.

For more information on amendments, see the [AmpliFund Amendment Guide for Grant Funders](#), [Euna Grants Amendment Guide for Grant Funders](#), or [AmpliFund Amendment Guide for Grant Recipients](#), [Euna Grants Amendment Guide for Grant Recipients](#).

## How To Add an Amendment

Amendments can have as many as four parts: [Awarded Amount](#), [Award Duration](#), [Category Budget](#), and [Performance Goal](#). Depending on the Grant Settings, not all types may be available.

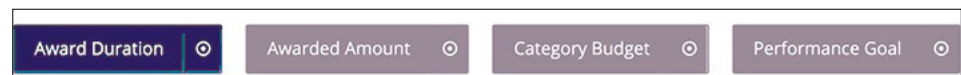
1. Open **Grants Management>Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Amendments**.
4. Click the **+** (**Add icon**) in the *Icon Bar*.
5. To add an amendment type, click the  (**Activate icon**) on the grayed-out tab.



6. Enter the information for the selected amendment type.
7. Click **Save**. You will need to manually update your grant data to reflect the amendment changes.

## How to Add an Award Duration Amendment Type

1. Click **Award Duration**. If the amendment type is not active, click the  (**Activate icon**) to activate.



### Note

If your amendment includes multiple amendment types, the *Amendment Name* and *Date Requested/Approved* fields will be the same for each type.

2. Add the **Amendment Name**.
3. In the *Date Approved* field, select the **date the amendment was approved**.
4. Select the **Approved End Date** and **Approved Close Out Date**. The *Current End Date* and *Current Close Out Date* are listed for reference.

5. Add the **Justification** for your amendment.
6. To *Attach Documentation*, click **Choose a file** to select a file from your computer.
7. Add any **Internal Notes** about the amendment for you or your staff to view.
8. Click **Save**. You will need to manually update your grant's End Date and Close Out Date to reflect the amendment changes.

## How To Add an **Awarded Amount** Amendment Type

1. Click **Awarded Amount**. If the amendment type is not active, click the  (**Activate icon**) to activate.




### Note

If your amendment includes multiple amendment types, the *Amendment Name* and *Date Requested/Approved* fields will be the same for each type.

2. Add the **Amendment Name**.
3. In the *Date Approved* field, select the **date the amendment was approved**.
4. Add the new **Approved Total Awarded Amount**. The *Current Total Awarded Amount* is listed above this field for reference.
5. Add the **Justification** for your amendment.
6. To *Attach Documentation*, click **Choose File** and select a file from your computer.
7. Add any **Internal Notes** about the amendment for you or your staff to view.
8. Click **Save**. You will need to manually update your grant's Awarded Amount to reflect the amendment changes.

## How To Add a **Category Budget** Amendment Type

1. Click **Category Budget**. If the amendment type is not active, click the  (**Activate icon**) to activate.



### Note

If your amendment includes multiple amendment types, the *Amendment Name* and *Date Requested/Approved* fields will be the same for each type.

2. Add the **Amendment Name**.
3. In the *Date Approved* field, select the **date the amendment was approved**.

### **Category Budget**

4. Select all applicable **categories**. If a category is not available, you can add it by clicking **Add New Category**. **Category Name** and **Proposed Budgeted Category Total** fields will appear in the *Budget Categories* section below.

## Budget Categories

5. Add the **budget amount by category** in the respective *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.
6. Add the **Justification** for your amendment.
7. To *Attach Documentation*, click **Choose a file** to select a file from your computer.
8. Add any **Internal Notes** about the amendment for you or your staff to view.
9. Click **Save**. You will need to manually update your grant's budget to reflect the amendment changes.

## How To Add a Performance Goal Amendment Type

1. Click **Performance Goal**. If the amendment type is not active, click the **○ (Activate icon)** to activate.

2. Add the **Amendment Name**.
3. In the *Date Approved* field, select the **date the amendment was approved**.

## Performance Plan Goal

4. Select all applicable **goals**. If a goal is not available, you can add it by clicking **Add New Goal**. A *Goal Type* field will appear in the *Current Performance Plan Goals* section below.

### **!** Note


If your amendment includes multiple amendment types, the *Amendment Name* and *Date Requested/Approved* fields will be the same for each type.

## Current Performance Plan Goals

5. Add the approved **goal(s)** in the respective *Goal Type* field(s). The current goal is listed above each field for reference. If you have added a new goal, you can enter the new **category** in the *Goal Type* field.
6. Add the **Justification** for your amendment.
7. To *Attach Documentation*, click **Choose a file** to select a file from your computer.
8. Add any **Internal Notes** about the amendment for you or your staff to view.
9. Click **Save**. You will need to manually update your grant's performance plan to reflect the amendment changes.

## How To Edit an Amendment

Prerequisite: Amendment cannot be submitted to funder.


1. Open **Grant Management>Grants Awarded**.
2. Click on a **grant name**.
3. Open **Post-Award tab>Management>Amendments**.
4. Click the  (**Edit icon**) next to an amendment name.

Amendment Name	Date Created
Amendment	11/3/2016

5. Update the information as necessary.
6. Click **Save**.

## How to Delete an Amendment

Prerequisite: Amendment cannot be submitted to funder.

1. Open **Grant Management>Grants Awarded**.
2. Click on a **grant name**.
3. Open **Post-Award tab>Management>Amendments**.
4. Click the  (**Delete icon**) next to an amendment name.

Amendment Name	Date Created
Amendment	11/3/2016

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

## How To View an Amendment Status

1. Open **Grant Management>Grants Awarded**.
2. Click on a **grant name**.


- Open **Post-Award tab>Management>Amendments**.
- Click on an **amendment name**.

Amendment					
Amendment Type	Date Created	Date Submitted	Amendment Creator Type	Submitted By	Internal Notes
Awarded Amount	11/3/2016		Funder		
Award Duration	11/3/2016		Funder		

## How To Submit a Decision on an Amendment

### **For funder clients**

Prerequisite: Must be a funder Organizational Admin, Grant Manager, or Responsible Individuals


- Open **Grants Management>Grants Awarded**.
- Click a **grant name**.
- Open the **Post-Award tab>Management>Amendments**. On the *Amendments* page, any amendment that is pending a decision will have a status of *In Process* and a  (Decision icon) next to its name.

Additional Budget and goal request   10/24/2016

- Click the  (**Decision icon**) next an amendment.

## Amendment Request Response






- Select your decision **Status**.
  - Approved:** The amendment is approved as proposed or adjusted
  - Denied:** The amendment is denied
  - Needs More Information:** The amendment is denied and more information from the recipient is necessary
- Add amendment information.
- Click **Save** to save your progress, or click **Submit** to send your amendment response (for all amendment types) to the recipient. Award data will be automatically updated once you submit your approval; however, you may be required to manually update some data depending on the amendment changes.

**Submission Reminder** 

By submitting you will be sending the amendment decision to the recipient organization.  
You cannot make any further changes after submission.



## Icons

-  Print
-  Help
-  Create
-  Edit
-  Delete

# Grant Opportunities and Sub-Awards

Grant opportunities are competitive opportunities for sub-awarding a grant, or creating an award that has the grant as a funding source. Application forms and templates can be used to create the opportunity; potential sub-recipient organizations may then apply to the opportunity for awards. Sub-awards may be created from a grant opportunity (for clients with *Competitive Award Management*) or from a grant as a sub-award.

For more information on creating, publishing, and managing opportunities, see the [Competitive Award Management Guide](#).

## Note

Depending on your account settings, this record type may have additional custom fields or sections.

## How To Add a Grant Opportunity

A grant opportunity is a competitive award opportunity with program funding a single grant. Many of the fields are optional on the Opportunity form so that information can be added at a later time. However, publishing and posting an opportunity without the necessary information is not recommended.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Management>Grant Opportunities**.
4. Click the **+** (**Create icon**) in the *Icon Bar*.

## Opportunity Information

5. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.

Make Viewable to Applicants

6. Add **Title**.
7. Add **Description** (optional).
8. Select **Fund Activity Category**. This list pulls from *Administration>Lists>Fund Activity Categories*.
9. Add **Category Explanation** or description (optional).
10. Select an **Opportunity Manager**. This list pulls from *Contacts>Staff*. Opportunity Managers can edit Opportunity Details and create, edit, and delete all items related to their opportunity, including application forms, and budget and performance plan templates. Additionally, Opportunity Managers can enroll opportunities and applications in workflows and will receive automated emails when applications have been submitted to their opportunity.
11. Select a **Posted Date**. This is the date a published fund opportunity will be

available to applicants.

12. Select an **Archive Date**. This is the date a published fund opportunity will no longer be available to applicants.
13. Add a **Funding Opportunity Number** (optional). This is a reference number for the opportunity assigned by your organization.
14. Add an **Assistance Listings Number** (formerly CFDA Number) (optional).
15. Check the **Is Published checkbox** to publish the opportunity. A published opportunity will be available to applicants between the Posted and Archive Dates. We recommend that you only publish the opportunity after all changes to the opportunity have been made.

Is Published <input type="checkbox"/>
---------------------------------------

**Note**

The total program funding is the parent grant's post-award awarded amount. This amount cannot be changed.

### Funding Information

16. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.

<input checked="" type="checkbox"/> Make Viewable to Applicants
---

### Award Information

17. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.

<input checked="" type="checkbox"/> Make Viewable to Applicants
---

18. Add **Award Ceiling** (optional). This is the maximum amount a single award recipient may receive.
19. Add **Award Floor** (optional). This is the minimum amount a single award recipient may receive.
20. Select the expected **Award Start Date** (optional).
21. Select the expected **Award End Date** (optional).
22. Add the **Expected Number of Awards** (optional).
23. Select **Matching Requirement**.
  - a. If Yes, add **Cash Match Requirement**, **In-Kind Match Requirement**, and **Other Funding Requirement** percentages (in decimal format).

Cash Match Requirement	<input type="text" value="25.00%"/>
In-Kind Match Requirement	<input type="text"/>
Other Funding Requirement	<input type="text"/>

## Submission Information

24. Uncheck the **Make Viewable to Applicants checkbox** to hide all information in the section to applicants.

Make Viewable to Applicants

25. Select **Submission Timeline Type**.

- **One-Time:** Applications will only be accepted for a specified timeframe
- **Rolling:** Applications will continuously be accepted after specified date

26. Select **Submission Open Date**. This is the date and time that applications will be accepted.

27. Add **Submission Close Date** (for one-time submissions). This is the date and time that applications will no longer be accepted.

28. Select **Time Zone** for submission open and close times.

29. Add **Submission Timeline Additional Information** (optional).

30. Check the **Allow Multiple Applications checkbox** to allow an organization to submit multiple applications.

## Eligibility Information

31. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.

Make Viewable to Applicants

32. Select **Eligibility Type**.

- **Public:** Opportunity appears on funder's opportunity list in the Applicant Portal
- **Private:** Opportunity does not appear on funder's opportunity list in the applicant portal and can only be accessed by URL link

33. Select **Eligible Applicants**. These are organization types that can apply to the opportunity.

34. Add **Additional Eligibility Information** (optional).

## Additional Information

35. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.

Make Viewable to Applicants


36. Add **Additional Information URL** (optional). This is a website link that may provide more information for applicants.

37. Add **Additional Information URL Description** (optional).

38. Click **Create**. This will also create a Public Link that can be used to access the opportunity on the Applicant Portal. The link will only be active for applicants when the opportunity has been published.

Public Link <https://demo.amplifund.com/Public/Opportunities/Details/2e569f26-b0fa-4871-90b0-9af2967b86a6>


## How To Edit a Grant Opportunity

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Management>Grant Opportunities**.
4. Click the  (**Edit icon**) next to a grant opportunity.



5. Update the information as necessary.
6. Click **Save**.


## How To Delete a Grant Opportunity

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Management>Grant Opportunities**.
4. Click the  (**Delete icon**) next to a grant opportunity.



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

## How To Publish a Grant Opportunity

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Management>Grant Opportunities**.
4. Click the  (**Edit icon**) next to a grant opportunity.



## Opportunity Information

5. Check the **Is Published** checkbox.

Is Published

6. In the confirmation pop-up window, click **Yes**.

### Note

Depending on your account settings, this record type may have additional custom fields or sections.

## How To Add a Sub-Award

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Management>Sub-Awards**.
4. Click the **+** (**Create icon**) in the *Icon Bar*.


## Sub-Award Information

5. In the pop-up window, select sub-award **Recipient**. This list pulls from *Contacts>Sub-Recipients*.
6. Select your organization's **Responsible Person** for the sub-award. The Responsible Person can edit sub-award details, performance plan settings, and budget settings, and can view items related to their award. They cannot view budget or expenses. This list pulls from *Contacts>Staff*.
7. Add an **Award Identification Number** (optional). This a reference number for an external system.
8. Add **Awarded Date**, **Length of Award** in years and additional months, and **Start Date**.
9. Add a **Description** (optional).

## Funding Information

10. Add **Cash Match Amount** requirement for the award (optional).
11. Add **In-Kind Match Amount** requirement for the award (optional).
12. Add **Other Funding Amount** requirement for the award (optional).
13. Add **Total Awarded Amount**.
14. Click **Create**.


## How To Edit a Sub-Award

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Management>Sub-Awards**.
4. Click the  (**Edit icon**) next to a sub-award.

5. Update the information as necessary.
6. Click **Save**.


## How To Delete a Sub-Award

Prerequisite: The sub-award cannot be activated.






1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Management>Sub-Awards**.
4. Click the  (**Delete icon**) next to a sub-award.
5. In the confirmation pop-up window, click **Delete**.

## How To Activate a Sub-Award

Prerequisite: The Performance Plan Settings and Budget Settings must be configured.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Management>Sub-Awards**.
4. Click the  (**Edit icon**) next to a sub-award name.
5. Click **Activate**.

## Icons


-  Print
-  Help
-  Create
-  Edit
-  Delete

# Settings

The Settings section of the Post-Award tab holds configuration settings for the grant's risk, budget and performance plan, reminders, and other general settings such as reporting periods, financial code, and expenses entry method.

## How To Configure Grant Settings

Grant settings include reporting periods, financial code, and expenses entry method.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Settings>Grant Settings**.
4. Click the  (**Edit icon**) in the *Icon Bar*.
5. Select the **Budget Reporting Period**.
6. Select the **Due Date for Budget Items** (optional). This is the date that budget items must be submitted to the funder for the reporting period.
7. Select the **Performance Reporting Period**.
8. Select the **Due Date for Performance Items** (optional). This is the date that performance items must be submitted to the funder for the reporting period.
9. Select the **HR Actual Entry Method**.
10. Select the **GL Actual Entry Method**.
11. On the *Add Expenses To Payment Requests By* field, select how sub-recipients should add expenses to payment requests.
  - **Date Range:** Reviewed or closed expenses can added to payment requests by their expense date
  - **Reporting Periods:** Only expenses that are closed out in reporting periods can be added to payment requests
  - **Date Range and Reporting Periods:** Reviewed or closed expenses can be added to payment requests by reporting period or by date
12. Add the grant **Financial Code** (optional). This is a unique code that will help identify the grant during import.
13. Click **Save**.

### Note


If **Import Only** is selected, users will not be able to add, edit, or delete line item expenses.

## How To Configure Grant Task Reminders

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.


### Note

The user must have Daily Digest or Weekly Digest emails enabled to receive reminders.

3. Open the **Post-Award tab>Settings>Reminders**.
4. Click the  (**Edit icon**) in the *Icon Bar*.
5. Select dates for **Default Task Reminders**, **Default Budget Reminders**, and **Default Performance Reminders** (optional). Euna Grants automatically will send email reminders to Responsible Individuals on these dates.

## How To Configure Grant Risk Thresholds





Grants analytics pages will show grant risk as high, medium, or low. Grant risk is defined by budget, performance, or reporting thresholds. A grant's overall risk is dictated by its highest level of risk in any category.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Settings>Risk Configuration**.
4. Click the  (**Edit icon**) in the *Icon Bar*.
5. Check the **Monitor Reporting Risk checkbox** if desired. This calculates reporting risk as the number of days a report is past due for a reporting period.
  - a. Add the **Low, Medium, and High** risk thresholds for number of days past due.
6. Check the **Monitor Budget Risk checkbox** if desired. This calculates budget risk as budget variance between planned and actual expenses as allocated.
  - a. Add the **Low, Medium, and High** risk thresholds for percent within total budget.
7. Check the **Monitor Performance Risk checkbox** if desired. This calculates performance risk as the total percentage of performance goals out of allocation.
  - a. Add the **Low, Medium, and High** risk thresholds for percent of goals on target.

## ***Grant Tools***

The *Tools tab* allows users to create and send email messages, create and assign tasks, add documents, and create notes attached to the grant record.

## Icons

-  Print
-  Help
-  Create
-  Address Book

# Email Manager


From the Email Manager, users may create and send emails that will be connected to the record. The emails will be sent to the recipients' primary email addresses and will also appear in *Activity>Message Center*.

## How To Create an Email

1. Open an **object record**.
2. Open the **Tools tab>Email Manager**.
3. Click the **+** (**Create icon**) in the *Icon Bar*.
4. In the *To* field, select the **email recipient**. This list pulls from *Contacts>Individuals* and *Contacts>Staff*.



5. In the *CC* and *BCC* fields, select **additional recipients** (optional). These lists pull from *Contacts>Individuals* and *Contacts>Staff*.
6. Add the message **Subject**.
7. In the *Html Body* field, add the **email message**.









8. Click **Select files...** to add a file from your computer (optional).
9. Click **Send**.

## How To View an Email

1. Open an **object record**.
2. Open the **Tools tab>Email Manager**.
3. Click a **subject name**.

## Icons

-  Print
-  Help
-  Create
-  Edit
-  Delete
-  Mark as Complete

## Note

Depending on your account settings, this record type may have additional custom fields or sections.

# Tasks

From the Tasks list, users can create and assign tasks to other staff that will be connected to the object record. Once created, tasks will appear on that staff's Euna Grants calendar, and they will receive email reminders related to that task.


## How To View a Task




1. Open an **object record**.
2. Open the **Tools tab>Tasks**.
3. Click a **task name**.

## How To Add a Task


1. Open an **object record**.
2. Open the **Tools tab>Tasks**.
3. Click the **+** (**Create icon**) in the *Icon Bar*.
4. Add the task **Name**.
5. Select the **Task Type**.
6. Add the task **Description** (optional).
7. Select the **Task Status**.
8. Select the **Responsible Individual**. This list pulls from *Contacts>Staff*.
9. Select **Additional Individuals** (optional). This list pulls from *Contacts>Staff*. Additional Individuals will receive email reminders and can view the task in *Activity>Tasks*. They can also mark the task as complete.
10. Select a **Due Date**.
11. Select the **Task Reminders**. These reminders will schedule emails to the Responsible Individual and Additional Recipients about the task. Staff will not receive reminders once the task is marked complete.
12. Click **Save**.

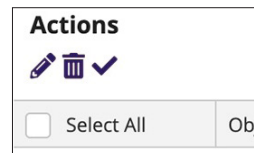
## How To Edit a Task

1. Open an **object record**.
2. Open the **Tools tab>Tasks**.
3. Click the  (**Edit icon**) next to a task name.

Name	Responsible Individual
Budgeting Tracking Period Due - FY 2018 Block Grant   	Sherry Gray


4. Update the information as necessary.




5. Click **Save**.
- OR --
1. Open an **object record**.
2. Open the **Tools tab>Tasks**.
3. Select **task checkboxes**.
4. Click the  (**Edit icon**) under *Actions*.



5. In the pop-up window, select **Task Status, Responsible Individual, and/or Due Date**.
6. Click **Save**.

## How To Delete a Task



1. Open an **object record**.
2. Open the **Tools tab>Tasks**.
3. Click the  (**Delete icon**) next to a task name.

Name	Responsible Individual
Budgeting Tracking Period Due - FY 2018 Block Grant   	Sherry Gray

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








## How To Mark a Task as Complete

1. Open an **object record**.
2. Open the **Tools tab>Tasks**.
3. Click the  (**Mark as Complete icon**) next to a task name.

Name	Responsible Individual
Budgeting Tracking Period Due - FY 2018 Block Grant   <input checked="" type="checkbox"/>	Sherry Gray

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

## Icons


-  Print
-  Help
-  Upload Documents
-  Create Folder
-  Edit
-  Delete
-  Download

# Documents

Within Documents, users can upload and view object-specific files and folders. Once an object record has been created, Euna Grants automatically creates a record folder that is accessible from the object record or from the *Documents* module.

To learn more about document management, see the [Euna Grants Document Management Guide](#).

## How To Upload a Document

1. Open an **object record**.
2. Open the **Tools tab>Documents**.
3. Click the  (**Upload Document icon**) in the *Icon Bar*.








4. In the pop-up window, click **Choose a file** to upload file(s) from your computer.
5. Click **Upload**.

## How To View a Document

1. Open an **object record**.
2. Open the **Tools tab>Documents**.
3. Click a **file name**.

## Icons

-  Print
-  Help
-  Create
-  Edit
-  Delete

## Note

Depending on your account settings, this record type may have additional custom fields or sections.

# Notes

Additional information related to the grant may be stored as a Note. Each note may include a title, note date, text, and an attachment.


## How To Add a Note

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Tools tab>Notes**.
4. Click the **+** (**Create icon**) in the *Icon Bar*.
5. Add a **Title**.
6. Select a **Note Date** (optional).
7. Select a **Note Type** (optional). This list pulls from *Administration>Lists>Note Types*.
8. Add the note **Body**.
9. Click **Select files...** to upload a file from your computer (optional).
10. Click **Create**.

## How To View a Note

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Tools tab>Notes**.
4. Click a **note title**.

## How To Edit a Note


1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Tools tab>Notes**.
4. Click the  (**Edit icon**) next to a note title.



5. Update the information as necessary.
6. Click **Update**.

## How To Delete a Note

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.

3. Open the **Tools tab>Notes**.
4. Click the  (**Delete icon**) next to a note title.



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




# ***Grant Workflow***

## ***For clients with the Workflow module***

Grants may be enrolled in workflows to manage business processes, such as grant application approvals or report routing. Additionally, grant budgets and grant performance plans may be enrolled in workflows to manage specific budget and performance plan review processes.

To learn more about workflows, see the [AmpliFund Workflow Guide Euna Grants Workflow Guide](#).

## Icons

-  Print
-  Help
-  Create

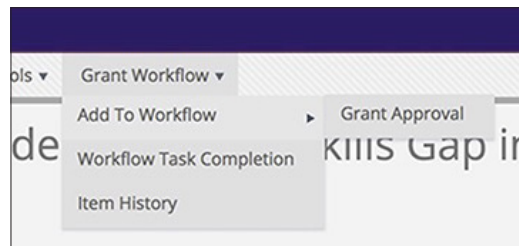
# Add To Workflow

## *For clients with the Workflow module*

Grants may be enrolled or added to workflow instances. A workflow instance is made up of workflow queues and actions. To learn more about workflows, see the [Euna Grants Workflow Guide](#) [Euna Grants Workflow Guide](#).







## How To Add a Grant to a Workflow Instance

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Grant Workflow tab>Add to Workflow**.
4. Select a **workflow instance** from the dropdown.



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

## Icons

	Print
	Help
	Favorite
	Edit
	Copy
	Delete







# Workflow Task Completion

The Workflow Task Completion list shows all grant workflow tasks and their status. To learn more about workflows, see the [Euna Grants Workflow Guide](#).

## How To View a Workflow Task

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Grant Workflow tab>Workflow Task Completion**.
4. Click a **workflow name**.

## Icons

-  Print
-  Help
-  Save View
-  Create
-  Import
-  Export

# Item History

The Item History list shows the workflow history for the grant, including queues, actions, and users. To learn more about workflows, see the [Euna Grants Workflow Guide Euna Grants Workflow Guide](#).

## How To View a Workflow Action

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Grant Workflow tab>Item History**.
4. Click a **workflow action name**.

# *Appendix*

# Grants Lists

- |                         |  |
|-------------------------|--|
| All Grants              | The All Grants list displays every enabled grant record visible to a user, regardless of the award status.               |
| Pending Grants          | The Pending Grants list displays all grant records with an award status of Pending.                                      |
| Active Grants           | The Active Grants list displays all grant records with an award status of Approved or Extended.                          |
| Denied Grants           | The Denied Grants list displays all grant records with an award status of Denied.  |
| Canceled Grants         | The Canceled Grants list displays all grant records with an award status of Canceled.                                    |
| Closed Grants           | The Closed Grants list displays all grant records with an award status of Closed.  |
| Completed Grants        | The Completed Grants list displays all grant records with an award status of Completed.                                  |
| Deleted/Disabled Grants | The Deleted/Disabled Grants list displays all grant records that have been deleted, or with a record status of Disabled. |

# Security Roles

Add-on modules are indicated with an asterisk (\*). For more information on each security role's access, see the [Euna Grants Security Role Matrix Guide](#) [Euna Grants Security Role Matrix Guide](#).

Organizational Admin	Organizational Admin have the highest level of security and can create, view, and edit all records in the account, including Staff compensation information. Organizational Admin are the only users that can create, view, and edit records in the <i>Administration</i> module. The <i>Administration</i> module includes License Information, Account Settings, Lead and Sub-Recipients* management, Workflow* management, System Security and user management, and Lists and Actuals management and import. There is no limit to the number of Organizational Admin you can have per account.
Executives	Executives can view all records in the account, including Staff compensation information, but cannot add or edit any records. Executive users can also view the License Information section in the <i>Administration</i> module.
Department Admin	Department Admin can create, view, and edit all grant and project* records linked to their department(s).
Department Users	Department Users can add achievements and expenses that are assigned to them. In addition, they can view all grant and project* records linked to their department(s). Department Users are classified as Salary or No Salary. Department Users (No Salary) cannot create, view, or edit personnel line items on a grant's budget.
Project Admin	Project Admin can create, view, and edit all project* records. In addition, Project Administrators can view all grants related to their projects.
Project Users	Project Users can add achievements and expenses assigned to them and can view and edit all projects* assigned to them. They can also view any grants linked to their projects. Project Users can create new projects. Project Users are classified as Salary or No Salary. Project Users (No Salary) cannot create, view, or edit personnel line items on a grant's budget.
Fund Admin	Fund Admin can create, view, and edit all fund*, opportunity*, and award* records.
Fund Users	Fund Users can view and edit any assigned fund* records. Fund Users can create new fund records. They can also create, view, and edit all opportunity* and award* records. Fund Users are classified as Salary or No Salary. If assigned to a grant, Fund Users (No Salary) cannot create, view, or edit personnel line items on a grant's budget.
Researcher	Researchers only have access to the <i>Research*</i> module. Researchers cannot apply for or manage grants.

## Implicit Security Roles

If users are designated as a record's manager (i.e. Grant Managers, Project Managers, or Fund Managers), they will have additional security privileges on those records. They will be able to view all calendar items related to the record, and view and edit the record. (No Salary) users will still not be able to see the personnel line items.