

Microenterprise TA – Reporting: Budget Estimates and Quarterly Milestones

Browser: Log into AmpliFund, <https://ne.amplifund.com> using Google Chrome, Mozilla Firefox, or Microsoft Edge.

Summary

At the beginning of your project, you will complete your budget estimates and milestones. You will report on the milestones quarterly.



Budget Year Estimates

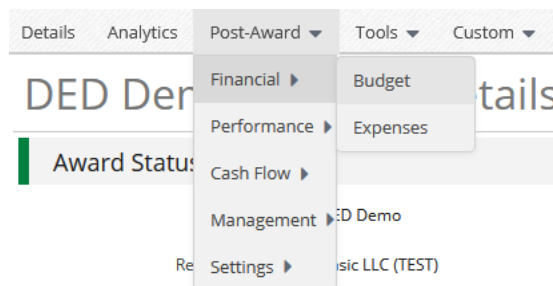


After you setup your budget using the “[Recipient Edit Budget](#)” guide, you will adjust your budget estimate for Year 1 and Year 2.

NOTE: Your corresponding ‘Joint Applicant #1’, ‘Joint Applicant #2’, and ‘Joint Applicant #3’ organizations will be the same across all reporting and forms for your Award. Example if ‘Joint Applicant #1’ is “Test Organization” in the budget, it is also ‘Joint Applicant #1’ in the milestones and quarterly report.

Navigate to your budget:

Login to AmpliFund > Grant Management (left navigation) > Grants > Post-Award (tab) > Financial > Budget



Select the **Grant Year** checkmark under the **Options** area.

Budget View Settings

Options

Grant Year Responsible Individuals GL Accounts Match

Edit Each Budget Category – Assign Organization

Click the Pencil icon to edit the budget category.



In the **Organization Information** area, fill in the **Organization Name**.

Click **Save**.

Use the corresponding ‘Joint Applicant #’ for all future reporting.

Edit Category Budget

Category Details

Category: Joint Applicant #1

Budgeted Amount*: \$3,000.00

Indirect Cost: Disable

Cash Match: Enable

In-Kind Match: Enable

Change Restrictions

Enable Expense Cap

Spending Alerts

Enable Monthly Spending Alerts

Enable Total Spending Alerts

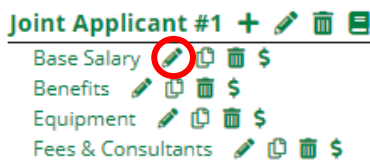
Organization Information

Organization Name: Test Organization

Save Lock Cancel

Edit Each Line Item - Adjust Estimates

Click the **Pencil icon** to edit the line item.



Click on the **Financials** tab.

In the **Allocate** area, select **Yearly**.

Adjust the **Grant Year 1** and **Grant Year 2** direct cost amounts. (Year 1 and Year 2 will equal your total cost)

Click **Save**.

General **Financials** Configuration Attachments

Direct Cost

Cash Match Amount Dollar Percentage

In Kind Amount Dollar Percentage

GL Account

Allocate Monthly Yearly

↕

Grant Year	Start Year	Amount
1	2021	<input type="text" value="\$1,000.00"/>
2	2022	<input type="text" value="\$4,500.00"/>

Direct Cost = Grant Year 1 + Grant Year 2

Forms



You will complete the following forms at different times in your project:

- Microenterprise TA Quarterly Milestones
 - Complete once (Any edits should be made to this form, do not create a new form).
- Microenterprise TA Quarterly Report
 - Complete every quarter.

To navigate to forms:

Login to AmpliFund > Grant Management (left navigation) > Grants > [Choose Your Grant] > Custom (tab) > [Select Form]

Details Analytics Post-Award Tools Custom

DED Demo - Award [Details]

Award Status

Name DED Demo

- External User Consent (3rd Party)
- State of Nebraska W9 and ACH Enrollment Form
- Microenterprise TA Quarterly Milestones
- Microenterprise TA Quarterly Report

Click the **+** icon in the top right.



Complete the form.

NOTE: Each applicant will correspond to the budget's categories.

NOTE: Complete each section. If you do not have a Joint Applicant #, complete the first question and skip the rest of the section. Verify you complete the 'Form Completion' section at the bottom.

When you are done, click **Create** in the bottom right.



After creation if you need to edit the form, click the **Pencil icon** in the row of the form.



After your edits are made, click **Save** at the bottom right side of your screen.

