

NAHTF – Editing Budget & Performance Plan

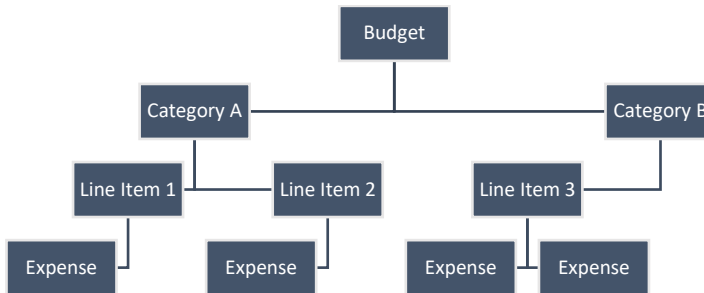
Browser: Log into AmpliFund, <https://ne.amplifund.com> using Google Chrome, Mozilla Firefox, or Microsoft Edge.

After meeting with your DED Program Rep, you may need to edit your Budget and Performance plan in AmpliFund.

Your Program Rep will assign tasks to you to complete. [Mark your task\(s\) complete](#) in AmpliFund when you are done (see final section for instructions).

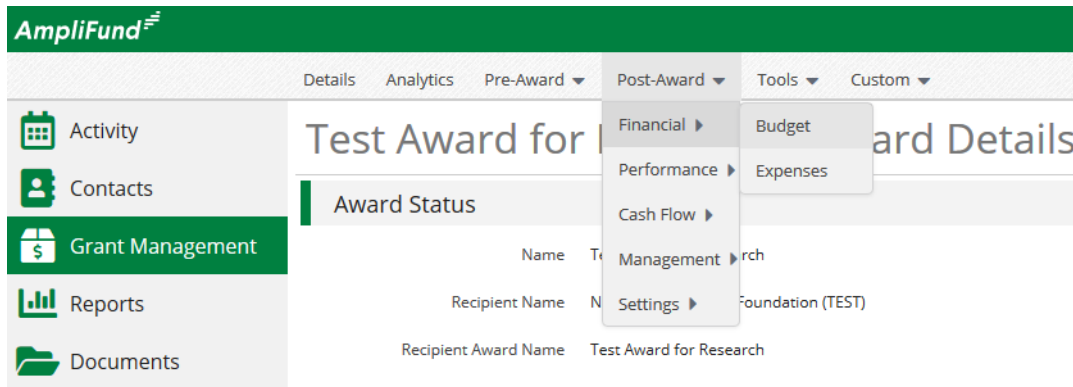
Budget

In AmpliFund, expenses will be allocated to line items. Line items will be allocated to Budget Categories.

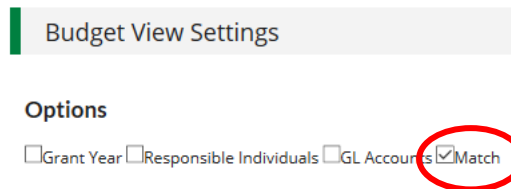


Note: You will not be adding expenses while setting up the budget. Examples of expenses are: invoices, receipts, etc.
















AmpliFund home screen > Grant Management > Grants > [Click the link to your Grant] > Post-Award (tab) > Financial > Budget



When you are on the Budget screen, view the 'Match' column by selecting it under **Options** if it is not selected by default.



The **Revenue Budget** at the bottom is a summary of your award. It will show the allocated **Grant Funded** and **Match** amounts that you will add/edit your **Expense Budget** to total to.

Budget			
Expense Budget +	Grant Funded	Match	Total Cost
01. New Construction +   			
Subtotal	\$0.00	\$0.00	\$0.00
02. Homebuyer Assistance +   			
Subtotal	\$0.00	\$0.00	\$0.00
03. Purchase Rehab Resale +   			
Subtotal	\$0.00	\$0.00	\$0.00
04. Rehabilitation +   			
Subtotal	\$0.00	\$0.00	\$0.00
05. Demolition +   			
Subtotal	\$0.00	\$0.00	\$0.00
Total Expense Budget Cost	\$0.00	\$0.00	\$0.00
Revenue Budget	Grant Funded	Match	Total Revenue
Grant Funding			
Awarded Amount	\$10,000.00		\$10,000.00
Subtotal	\$10,000.00		\$10,000.00
Match			
Cash Match		\$2,500.00	\$2,500.00
In-Kind		\$0.00	\$0.00
Subtotal		\$2,500.00	\$2,500.00
Total Revenue Budget Cost			(\$12,500.00)
Total Overall Budget Cost			(\$12,500.00)

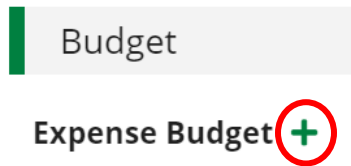
In the above example, \$10,000 has been awarded with a \$2,500 Cash Match. The total project cost is \$12,500, and the Expense Budget line items need to be added to reflect the Revenue Budget. These categories can be added in the future if an amendment requires funding to be added to a previously deleted category.

In some circumstances, your Budget may have completely or partially carried over from your Application. In other circumstances, your Budget may be blank. If your Budget is blank, you will need to start out with adding categories.

If your Budget carried over from your Application, it is possible you will not need to do any edits to it.

Adding Categories

If you need to add a category, click the + next to **Expense Budget**



Click the dropdown on the **Category** field to see the options, and click **Create**. See the next section for Category Detail information.

Adding Budget Allocations to Categories

In order to add line items to a category, there must be a budgeted amount in that category.

Click the edit pencil next to the category to verify there is a Budgeted Amount entered, or to add one.

01. New Construction +   
Subtotal

Budgeted Amount – Total Cost for the Category. Includes Grant Funds and Match amounts of line items.

Cash Match - Enable

In-Kind Match - Disable

Enable Expense Cap – Select, and enter the same amount that is entered in the Budgeted Amount.

Click **Save**

Edit Category Budget

Category Details

Category: 01. New Construction

Budgeted Amount*: \$10,000.00

Indirect Cost: Disable

Cash Match: Enable

In-Kind Match: Disable

Change Restrictions

Enable Expense Cap

Do not allow total line item expenses to exceed: \$10,000.00

Spending Alerts

Enable Monthly Spending Alerts

Enable Total Spending Alerts







Save **Lock** **Cancel**

Note: Only categories that you are going to use need category Budgeted Amounts. Categories that will not be used need to be deleted.

01. New Construction +   
Subtotal

Adding Line Items in Categories

Each category you are going to use for expenses, will need at least 1 line item. If you prefer, you can make your line item generic like the category name (like it is pictured below in the example) or you can add specific line items. This is your tool to track your expenses, so be as detailed as necessary to correctly account for your project costs.

Expense Budget +	Grant Funded	Match	Total Cost
01. New Construction +   			
New Construction    \$	\$7,500.00	\$2,500.00	\$10,000.00
Subtotal	\$7,500.00	\$2,500.00	\$10,000.00

To add a line item, click the green + next to the category.

01. New Construction    
Subtotal

General Tab

Item Type – Non Personnel / Personnel

Category – Will default to the category where you clicked the +, but can change it from the dropdown.

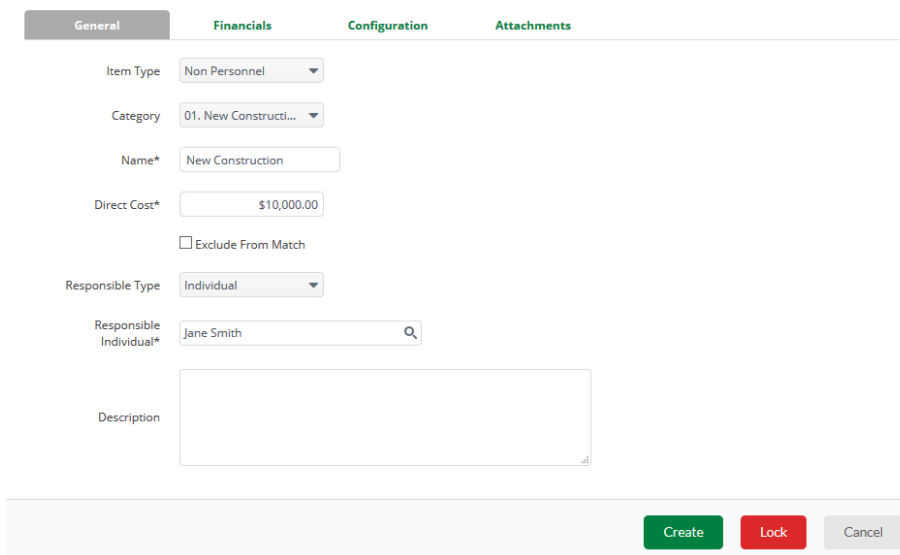
Name – Name of your line item; you can enter it as the name of the category if you choose to do so and only have 1 line item.

Direct Cost - Total line item cost. Grant Funds + Match

Exclude from Match – Select this if total of this line item is coming from Grant Funds. It will automatically enter \$0 on the Financials tab.

Responsible Individual – Select the user who will be responsible for the budget. They must already be an AmpliFund user in your Recipient account.

Description – Optional.



The screenshot shows a web form with four tabs: General, Financials, Configuration, and Attachments. The 'General' tab is active. The form contains the following fields:

- Item Type:** A dropdown menu with 'Non Personnel' selected.
- Category:** A dropdown menu with '01. New Constructi...' selected.
- Name*:** A text input field containing 'New Construction'.
- Direct Cost*:** A text input field containing '\$10,000.00'.
- Exclude From Match:** An unchecked checkbox.
- Responsible Type:** A dropdown menu with 'Individual' selected.
- Responsible Individual*:** A search input field containing 'Jane Smith' and a magnifying glass icon.
- Description:** A large empty text area.

At the bottom right of the form, there are three buttons: 'Create' (green), 'Lock' (red), and 'Cancel' (grey).

Financials Tab

Direct Cost – This is auto populated from the General tab. (Total line item cost. Grant Funds + Match)

Cash Match Amount – Toggle from Dollar or Percentage. Enter in the Cash Match for this line item. If this line item has no match, enter \$0 or 0 percentage.

GL Account - leave blank.

Allocate – Do not alter. These allocation amounts are auto populated and will not be used.

General **Financials** Configuration Attachments

Direct Cost

Cash Match Amount Dollar Percentage

GL Account

Allocate







↕↔

Grant Year	Start Year	Amount
1	2020	<input type="text" value="\$9,230.77"/>
2	2021	<input type="text" value="\$769.23"/>

Configurations Tab
Do not alter.

Attachments Tab
Do not alter.

Click **Create**

Expense Budget +	Grant Funded	Match	Total Cost
01. New Construction +   			
New Construction    \$	\$7,500.00	\$2,500.00	\$10,000.00
Subtotal	\$7,500.00	\$2,500.00	\$10,000.00

Edit Line Items in Categories

To edit an existing line item, click the pencil icon on the line item.
Follow the same guidelines as above to edit and save.

01. New Construction +   
New Construction    \$
Subtotal

Completed Budget Example

Your Award's budget categories may be different than the example below.

Budget			
Expense Budget +	Grant Funded	Match	Total Cost
01. New Construction +			
New Construction	\$7,500.00	\$2,500.00	\$10,000.00
Subtotal	\$7,500.00	\$2,500.00	\$10,000.00
05. Demolition +			
Demolition	\$2,500.00	\$0.00	\$2,500.00
Subtotal	\$2,500.00	\$0.00	\$2,500.00
Total Expense Budget Cost	\$10,000.00	\$2,500.00	\$12,500.00
Revenue Budget	Grant Funded C	Match	Total Revenue
Grant Funding			
Awarded Amount	\$10,000.00		\$10,000.00
Subtotal	\$10,000.00		\$10,000.00
Match			
Cash Match		\$2,500.00	\$2,500.00
In-Kind		\$0.00	\$0.00
Subtotal		\$2,500.00	\$2,500.00
	Total Revenue Budget Cost		(\$12,500.00)
	Total Overall Budget Cost		\$0.00 B

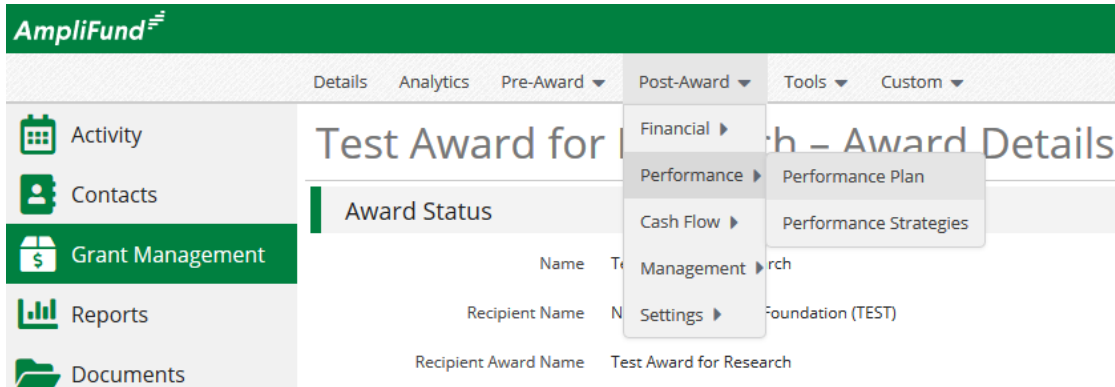
- A. Amount totals based upon your Award contract, found in the **Award Budget Information** on the Details tab.
- B. **Total Overall Budget Cost = \$0.00**
**Note: This \$0 is referring that your budget is "balanced".*
 Total Expense Budget Cost = (Total Revenue Budget Cost) = Grant Funds + Cash Match
- C. **Grant Funded** column (**Expense Budget**) equals the **Awarded Amount (Revenue Budget)** totals. **Match** column from **Expense Budget** equals the **Match** column from **Revenue Budget** totals.

Performance Plan

Your blank Goals or your previously entered goals from your application will already be entered into your Performance Plan, you will need to enter the agreed upon targeted numbers/milestones.

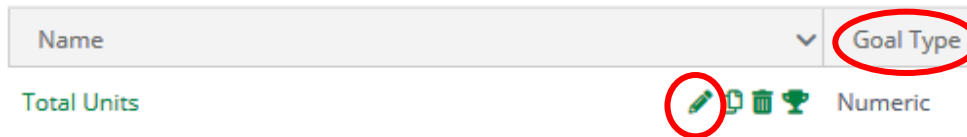
Please make sure your Goal names are clear, concise and easily identifiable.

AmpliFund home screen > Grant Management > Grants > [Click the link to your Grant] > Post-Award (tab) > Performance > Performance Plan



Editing Goals

To edit, click pencil next to the **Goal** name.



You will only need to edit and **save** the General tab.

The **Goal Type** will determine what you edit in the goal:

- Milestone
 - Description – Optional
 - Responsible Individual (needs to be AmpliFund user already connected to your account)
 - Due Date
- Numeric
 - Description - Optional
 - Responsible Individual (needs to be AmpliFund user already connected to your account)
 - Number to Be Achieved
- Narrative
 - Description
 - Responsible Individual (needs to be AmpliFund user already connected to your account)
 - Due Date
- Percent Achieved
 - Description – Optional
 - Responsible Individual (needs to be AmpliFund user already connected to your account)
 - Percent Desired
- Percent Changed
 - Description – Optional
 - Responsible Individual (needs to be AmpliFund user already connected to your account)
 - Current Percent
 - Percent Desired

Edit Performance Item

General

Allocations

Attachments

Strategy No Strategy

Goal Type Numeric

Name* Total Units

Description

Responsible Type Individual

Responsible Individual* Jane Smith

Number To Be Achieved* 0

Save
Cancel

Adding Goals

In some cases, you will need to add additional goals, from the Performance Plan screen click + in the top right. After selecting the **Goal Type**, the fields will change what is required. When done, click **Create**.



If the type is a 'milestone,' it will be its own separate goal. You may have multiple 'milestone' goals.

Examples

Project Description:

Name – Enter text “Project Description”

Description – Enter your project description information

Question – Enter text “Current Project Description”

General

Allocations

Attachments

Strategy No Strategy

Goal Type Narrative

Name* Project Description

Description

ORIGINAL PROJECT DESCRIPTION

Responsible Type Individual

Responsible Individual* John Doe

Question*

Current Project Description

Save
Cancel

Draws – One Required per 6 months

In order to be able to 'Save', re-enter 0 in the 'Number to Be Achieved'.

Edit Performance Item

General
Allocations
Attachments

Strategy:

Goal Type:

Name*:

Description:

Responsible Type:

Responsible Individual*:

Number To Be Achieved*:

Goal Notes

Note: Not all goal names will apply to your project.

Goal Name	Goal Type	Project Type Applicable
Project Description	Narrative	Housing & TA
Total Number of Units	Numeric	Housing
NAHTF Claimed Units	Numeric	Housing
AMIs Served: # ≤ 80%	Numeric	Housing
AMIs Served: # ≤ 100%	Numeric	Housing
AMIs Served: # ≤ 120%	Numeric	Housing
Milestone: <i>Name Specific</i>	Milestone	Housing
Draws – One Required per 6 months	Numeric	Housing & TA
Project Specific: <i>Name Specific</i>	Milestone, Numeric, Percent Achieved, Percent Changed	Housing & TA
Work Plan: <i>Name Specific</i>	Milestone	TA

Marking Tasks Complete

You will have at least 3 tasks to complete. There are 2 ways to navigate to Tasks.

- a) Activity (side navigation) > Tasks
- b) AmpliFund home screen > Grant Management > Grants > [Click the link to your Grant] > Tools > Tasks

Mark the Tasks you are done with as 'Complete':


1. Select Goals that you wish to mark complete, then click the **Mark as Complete** action.



Actions

Select All

	Object Type	Name	
<input checked="" type="checkbox"/>	Grant	Edit Budget	✎ 🗑 ✔
<input type="checkbox"/>	Grant	Edit Performance Plan Goals	✎ 🗑 ✔

2. Individually click the **Mark as Complete** action on the individual Task.

Actions


<input type="checkbox"/> Select All	Object Type	Name	
<input type="checkbox"/>	Grant	Edit Budget	
<input type="checkbox"/>	Grant	Edit Performance Plan Goals	

3. Click into the action, and click the **Mark as Complete** action in the top right.

