



IDOT – Grantee Training

AmpliFund Performance Functionality

Introductions

- IDOT Introduction
- AmpliFund Introduction

Agenda

- Training Overview
- PowerPoint Review
- Customer Support
- In-Product Demo
 - IDOT Resources
 - GATA Grantee Portal
 - Navigation and Grant Details
 - Review Performance Plan
 - Enter Achievements
 - Close Performance Reporting Period
 - Mark Tasks as Complete
 - Activity Center
 - Standard Performance Reports
- Question & Answer

IDOT Resources

IDOT Bureau of Safety Resources



- [Safety Grants Resources](#)
 - [2025 AmpliFund Non-Enforcement Application Guide](#)
 - [Starter's Guide for Operating a Grant in AmpliFund](#)
 - [Introduction To Amplifund Post-Award](#)

GATA Grantee Portal

GATA Pre-Requisites/Support

All grantees must be registered in the GATA Grantee Portal to access the Applicant Portal and AmpliFund

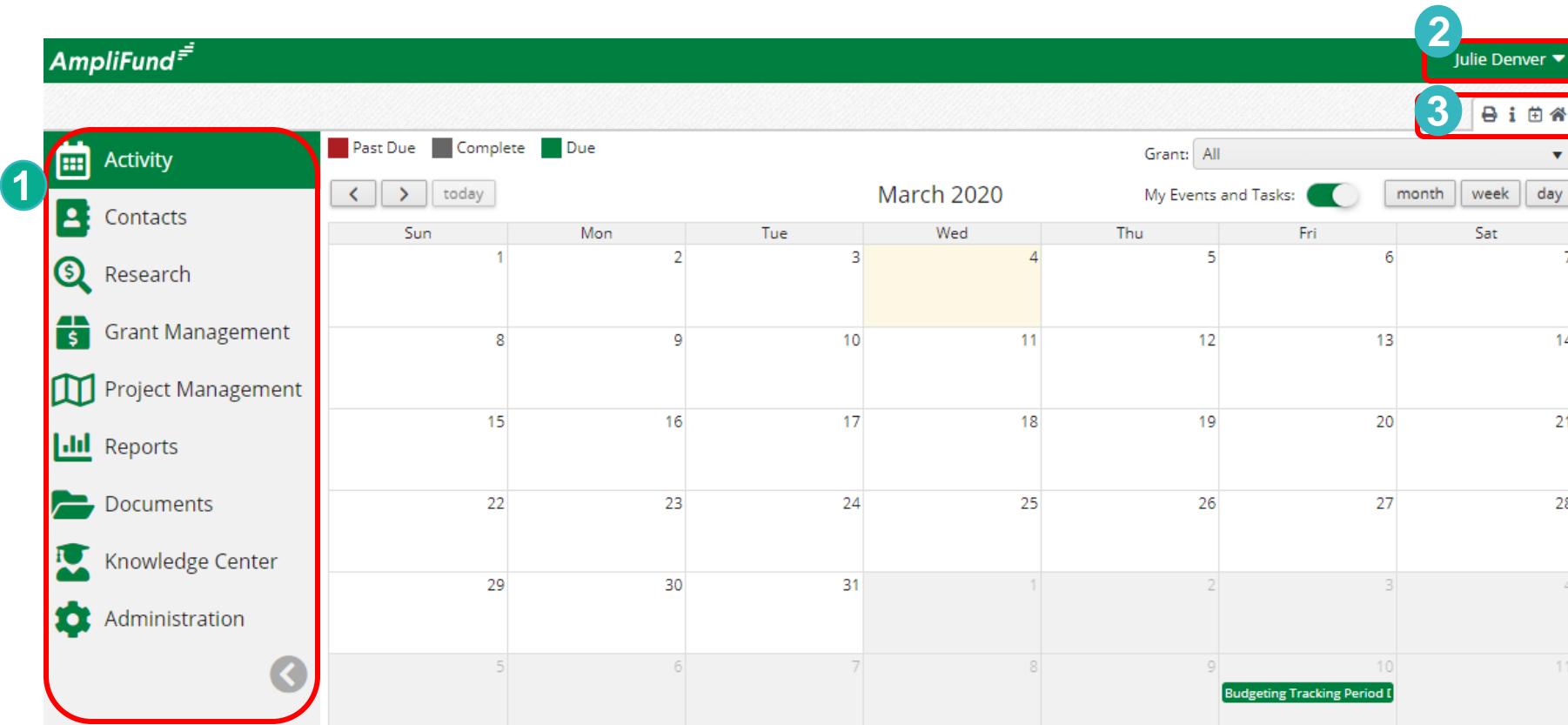
- Instructions on how to create an account, register an organization, and manage user access to AmpliFund here - <https://il-amplifund.zendesk.com/hc/en-us/articles/27588129343507-How-to-Add-New-Users-as-a-Grantee-and-Single-Sign-On-SSO-Process>
- Contact OMB GATA with questions about the GATA Grantee Portal - omb.gata@illinois.gov
- Contact AmpliFund Customer Support with questions about AmpliFund - support@il-amplifund.zendesk.com

Add the following information when contacting OBM GATA or AmpliFund for support:

- Your name
- Name of Organization
- Opportunity you are applying to
- Description of issue
- Related screenshots

Navigation and Grant Details

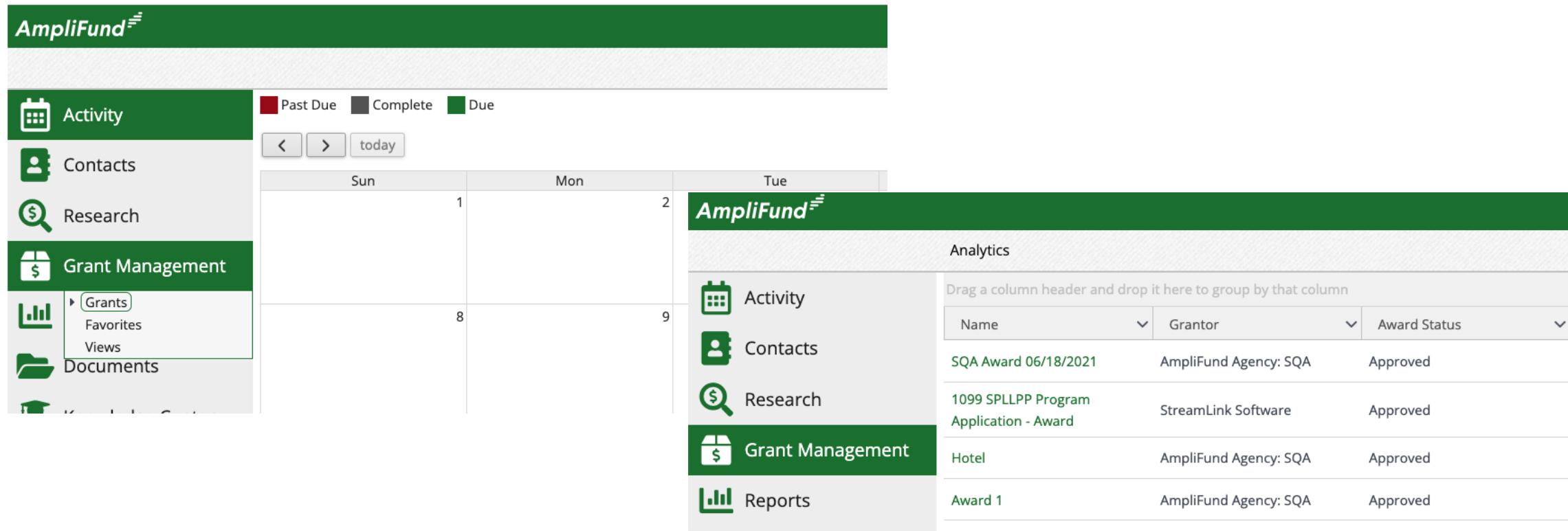
Basic Navigation



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

Access Grant Details Page

- Click on Grant Management > Grants
- Select the appropriate Grant
- Land on the Grant Details Page

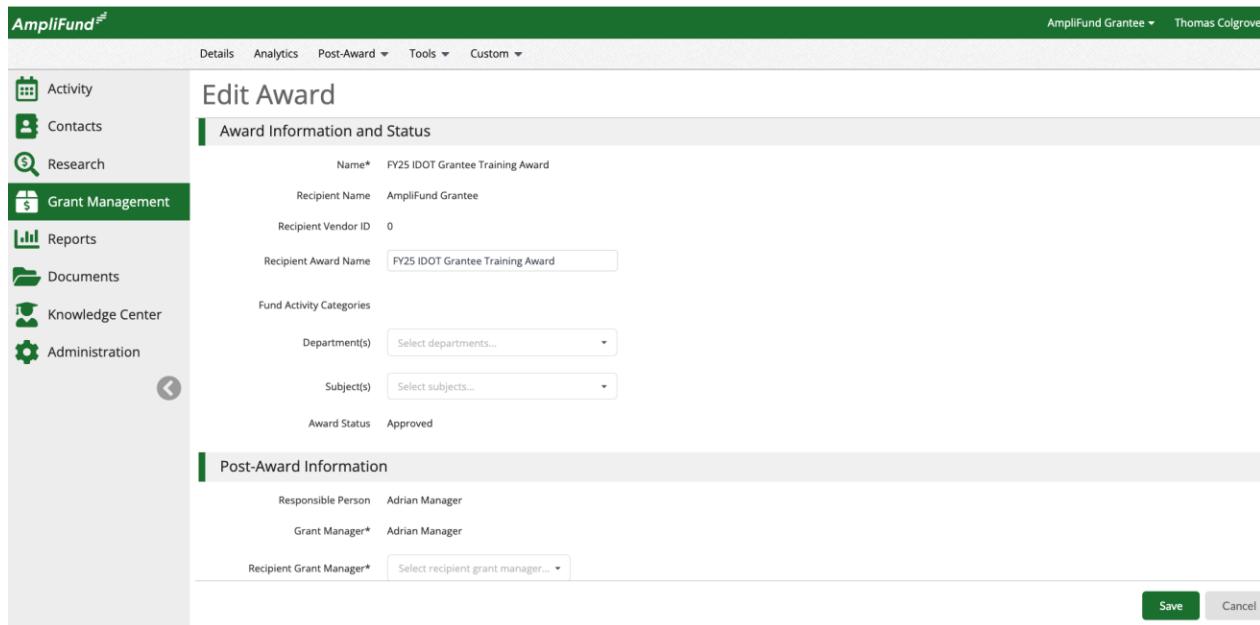


The screenshot shows the AmpliFund software interface. The left sidebar has a dark green header with the AmpliFund logo. Below it, the 'Grant Management' section is highlighted in green, showing sub-options: Grants (which is selected and highlighted in a light green box), Favorites, and Views. The main content area has a light gray header with the AmpliFund logo. Below it, there's a 'Past Due', 'Complete', and 'Due' status filter, a date navigation bar with 'today' and arrows, and a calendar view for the current week (Sun to Tue). The 'Analytics' section on the right lists grants with columns for Name, Grantor, and Award Status. The grants listed are:

Name	Grantor	Award Status
SQA Award 06/18/2021	AmpliFund Agency: SQA	Approved
1099 SPLP Program Application - Award	StreamLink Software	Approved
Hotel	AmpliFund Agency: SQA	Approved
Award 1	AmpliFund Agency: SQA	Approved

Update Grant Details

- Click on the pencil icon on the top right of the screen to edit
- Grantees can update the following Grant Details
 - Recipient Award Name – Optional
 - Recipient Grant Manager – Required
 - Recipient Description – Optional
- Click Save on the bottom right of the screen



AmpliFund

Details Analytics Post-Award Tools Custom

AmpliFund Grantee Thomas Colgrove

Activity Contacts Research Grant Management Reports Documents Knowledge Center Administration

Edit Award

Award Information and Status

Name* FY25 IDOT Grantee Training Award

Recipient Name AmpliFund Grantee

Recipient Vendor ID 0

Recipient Award Name FY25 IDOT Grantee Training Award

Fund Activity Categories

Department(s) Select departments...

Subject(s) Select subjects...

Award Status Approved

Post-Award Information

Responsible Person Adrian Manager

Grant Manager* Adrian Manager

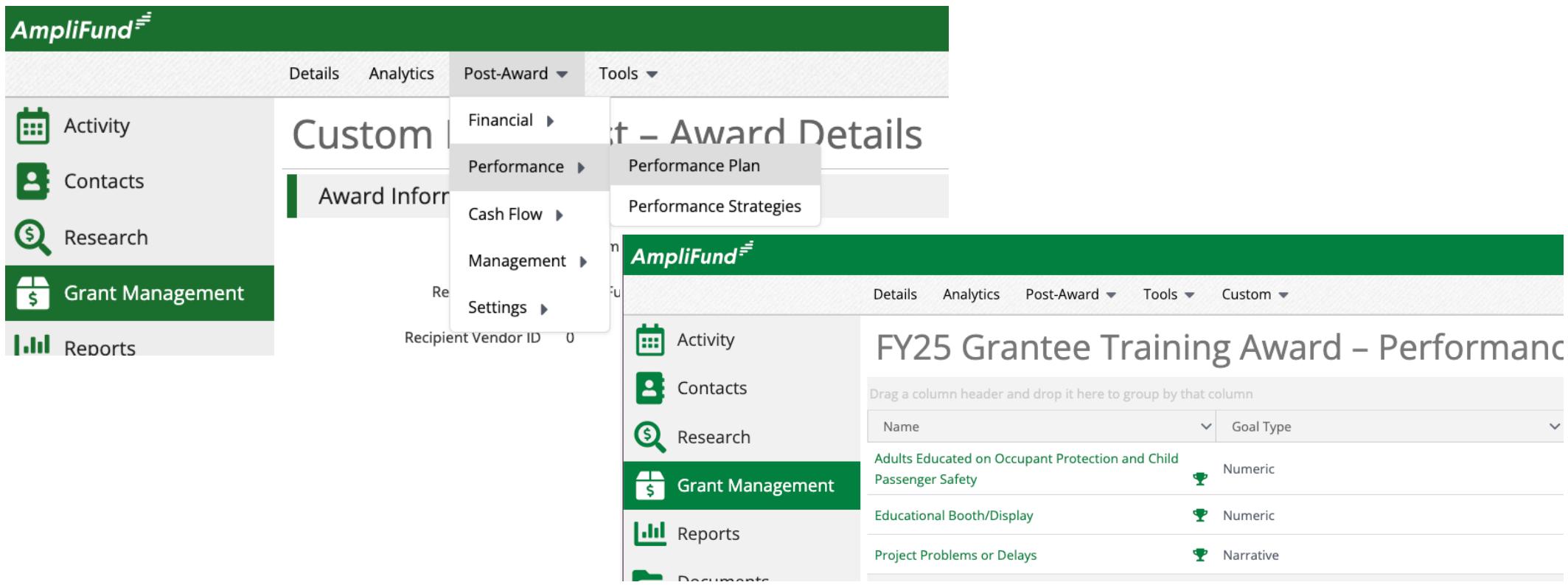
Recipient Grant Manager* Select recipient grant manager...

Save Cancel

Review Performance Plan

Review Performance Plan

- From the Grant Details page, click on Post-Award > Performance > Performance Plan
- Click on a Performance Goal name to review the details



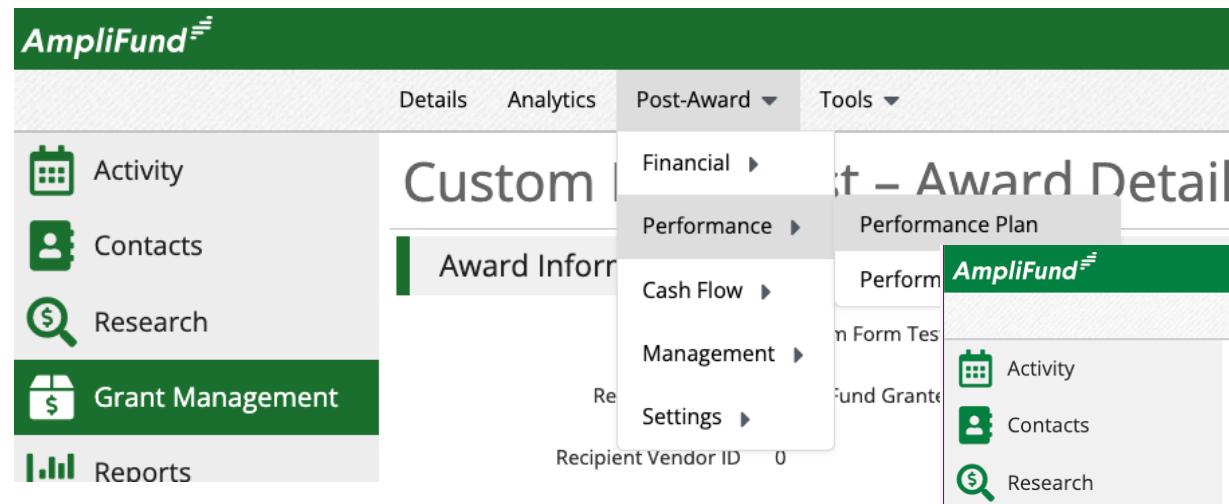
The screenshot shows the AmpliFund software interface. The top navigation bar includes 'Details', 'Analytics', 'Post-Award' (which is currently selected and has a dropdown menu), and 'Tools'. The 'Post-Award' dropdown menu is open, showing 'Financial', 'Performance' (which is selected and has a dropdown menu), 'Cash Flow', 'Management', and 'Settings'. The 'Performance' dropdown menu is also open, showing 'Performance Plan' (which is selected) and 'Performance Strategies'. The main content area displays a table titled 'FY25 Grantee Training Award – Performance Plan'. The table has columns for 'Name' and 'Goal Type'. The data rows are: 'Adults Educated on Occupant Protection and Child Passenger Safety' (Numeric), 'Educational Booth/Display' (Numeric), and 'Project Problems or Delays' (Narrative). The left sidebar contains links for 'Activity', 'Contacts', 'Research', 'Grant Management' (which is selected and highlighted in green), and 'Reports'.

Name	Goal Type
Adults Educated on Occupant Protection and Child Passenger Safety	Numeric
Educational Booth/Display	Numeric
Project Problems or Delays	Narrative

Enter Achievements

Enter Achievements – Grant Details

- From the Grant Details page, click on Post-Award > Performance > Performance Plan
- Click on the trophy icon next to the appropriate Performance Goal
- Click on the + icon on the top right of the screen
- Enter the details and click Create
- Ensure the Achievement Date is within the reporting period



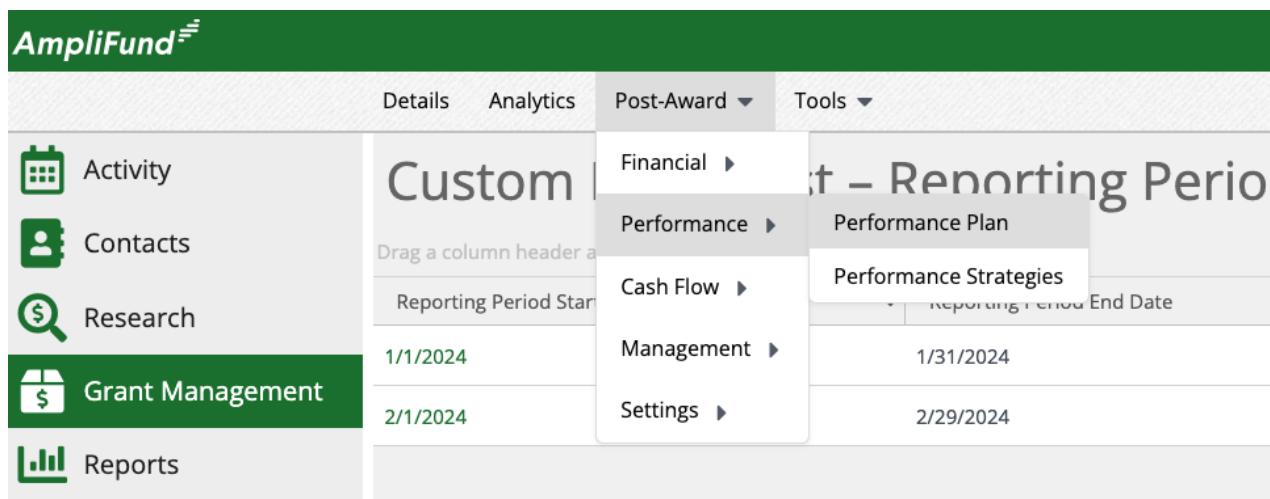
Create Achievement

Grant	Custom Form Test
Strategy	Strat 1
Goal Type	Numeric
Goal	goal 1
Description	
Responsible Individual	Thomas Colgrove
Achievement Date	9/17/2024 <input type="button" value="Calendar"/>
Number to be Achieved	5
Number Achieved	0 <input type="text"/>
Notes	
<input style="background-color: #0070C0; color: white; border: 1px solid #0070C0; padding: 2px 10px; border-radius: 5px; font-weight: bold; font-size: 10px; margin-right: 10px;" type="button" value="Create"/> <input style="border: 1px solid #ccc; padding: 2px 10px; font-size: 10px;" type="button" value="Cancel"/>	

Close Performance Reporting Period

Close Performance Reporting Period – Grant Details

- From the Grant Details page, click on Post-Award > Management > Reporting Periods
- Click on the + icon on the top right of the screen
- Select the Achievement option
- Select the appropriate reporting period
- Click Save



AmpliFund

Details Analytics Post-Award ▾ Tools ▾

Activity Contacts Research Grant Management Reports

Custom

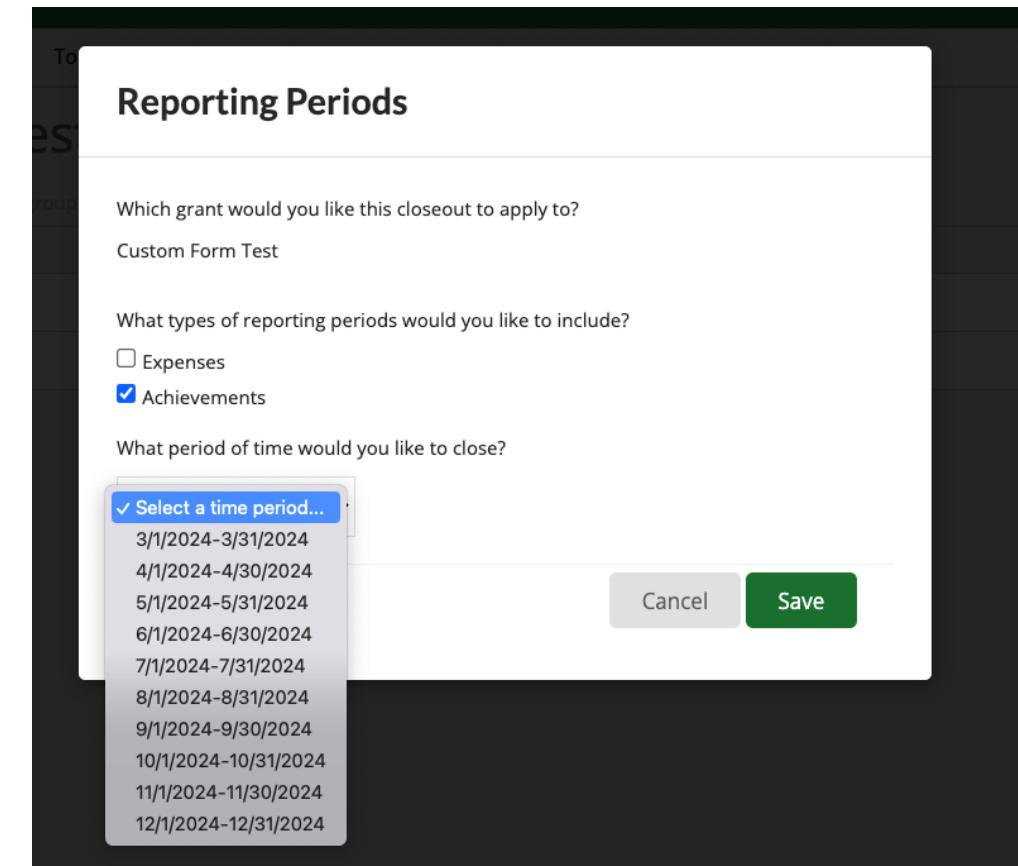
Reporting Period Start Date: 1/1/2024

Reporting Period End Date: 2/29/2024

Financial ▾ Performance ▾ Cash Flow ▾ Management ▾ Settings ▾

Performance Plan

Performance Strategies



Reporting Periods

Which grant would you like this closeout to apply to?
Custom Form Test

What types of reporting periods would you like to include?
 Expenses Achievements

What period of time would you like to close?

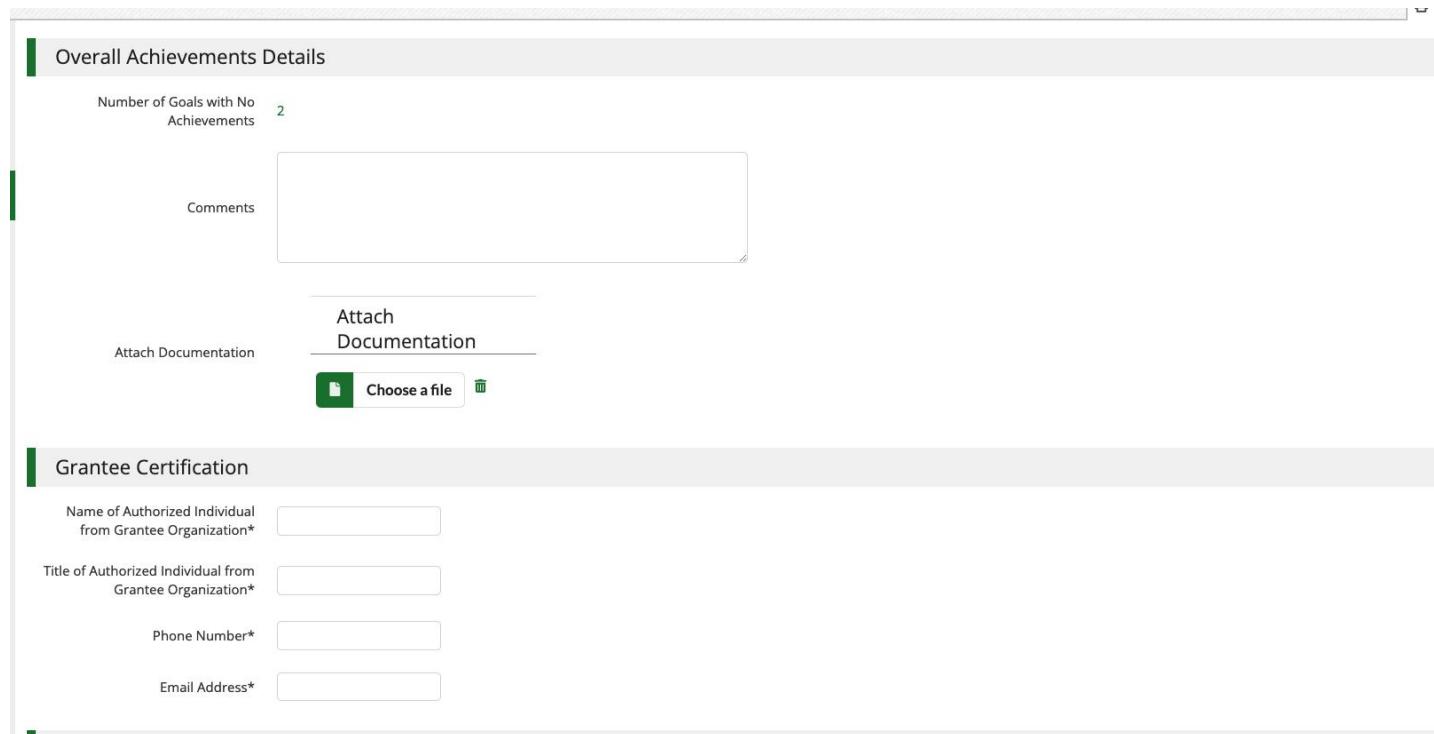
✓ Select a time period...

- 3/1/2024-3/31/2024
- 4/1/2024-4/30/2024
- 5/1/2024-5/31/2024
- 6/1/2024-6/30/2024
- 7/1/2024-7/31/2024
- 8/1/2024-8/31/2024
- 9/1/2024-9/30/2024
- 10/1/2024-10/31/2024
- 11/1/2024-11/30/2024
- 12/1/2024-12/31/2024

Cancel Save

Close Performance Reporting Period – Grant Details Continued

- Land on the Achievement Reporting Period Page
- Complete the required information
- Click Close on the bottom right of the screen



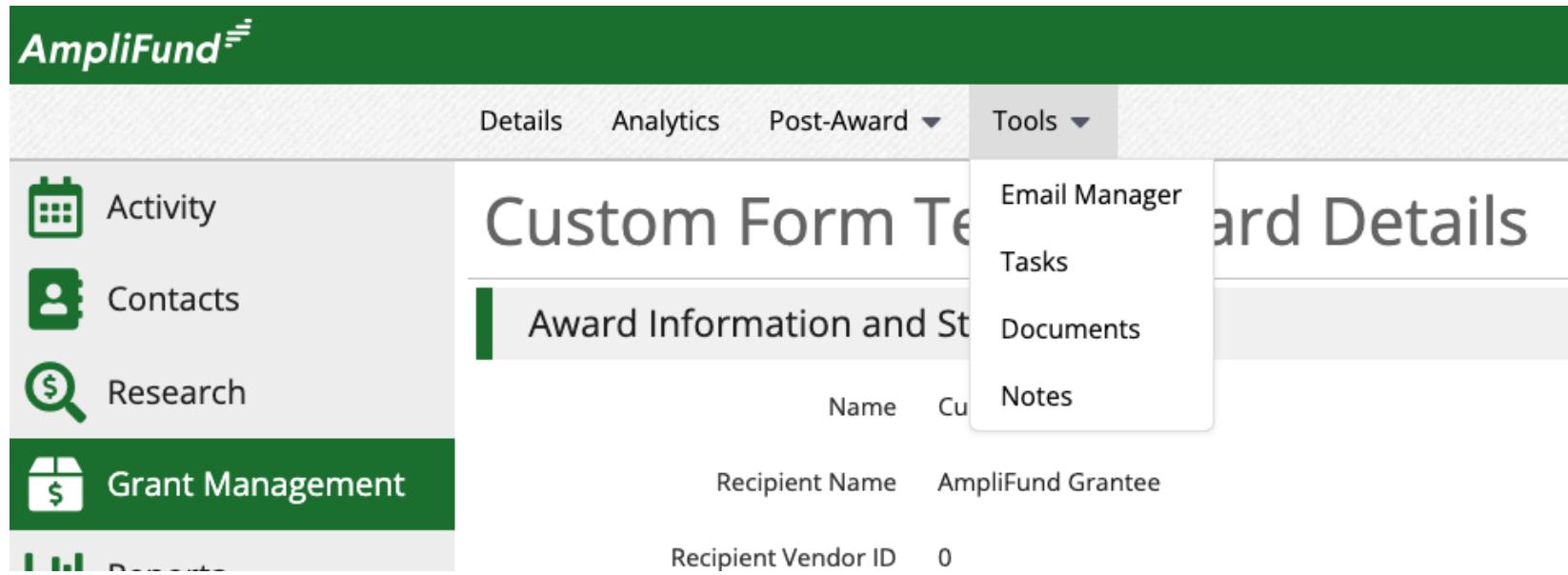
The screenshot shows two sections of a software interface:

- Overall Achievements Details:** This section contains:
 - A label "Number of Goals with No Achievements" followed by the value "2".
 - A large empty text area labeled "Comments".
 - A "Attach Documentation" section with a "Choose a file" button and a trash bin icon.
- Grantee Certification:** This section contains four text input fields:
 - "Name of Authorized Individual from Grantee Organization*" followed by an empty input field.
 - "Title of Authorized Individual from Grantee Organization*" followed by an empty input field.
 - "Phone Number*" followed by an empty input field.
 - "Email Address*" followed by an empty input field.

Mark Tasks as Complete

Access Tools

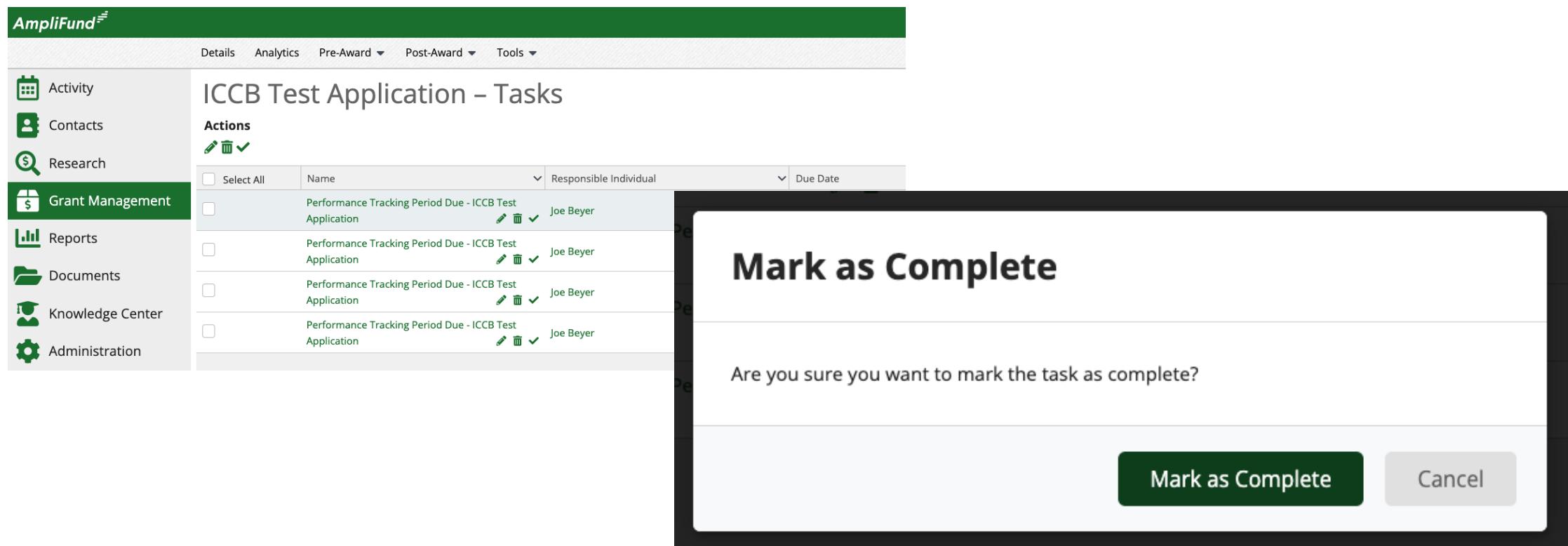
- From the Grant Details page, click on Tools



The screenshot shows the AmpliFund software interface. At the top is a green header bar with the AmpliFund logo. Below it is a navigation bar with tabs: Details, Analytics, Post-Award, and Tools. The Tools tab is currently active, with a dropdown menu open. The dropdown menu contains the following items: Email Manager, Tasks, Documents, and Notes. The main content area shows a "Custom Form Template" for "Award Information and Status". Below this, there are fields for "Recipient Name" (AmpliFund Grantee) and "Recipient Vendor ID" (0). On the left side, there is a sidebar with icons and labels: Activity, Contacts, Research, and Grant Management (which is highlighted in green). The "Grant Management" section is expanded, showing sub-options: Requests, Approvals, and Payments.

Mark Tasks as Complete

- Click on Tools > Tasks
- Click the checkmark next the Task to complete
- Confirm the pop-up window



AmpliFund

Details Analytics Pre-Award ▾ Post-Award ▾ Tools ▾

Activity Contacts Research

Grant Management

Reports Documents Knowledge Center Administration

ICCB Test Application – Tasks

Actions   

<input type="checkbox"/> Select All	Name	Responsible Individual	Due Date
<input type="checkbox"/>	Performance Tracking Period Due - ICCB Test Application	   Joe Beyer	
<input type="checkbox"/>	Performance Tracking Period Due - ICCB Test Application	   Joe Beyer	
<input type="checkbox"/>	Performance Tracking Period Due - ICCB Test Application	   Joe Beyer	
<input type="checkbox"/>	Performance Tracking Period Due - ICCB Test Application	   Joe Beyer	

Mark as Complete

Are you sure you want to mark the task as complete?

Mark as Complete

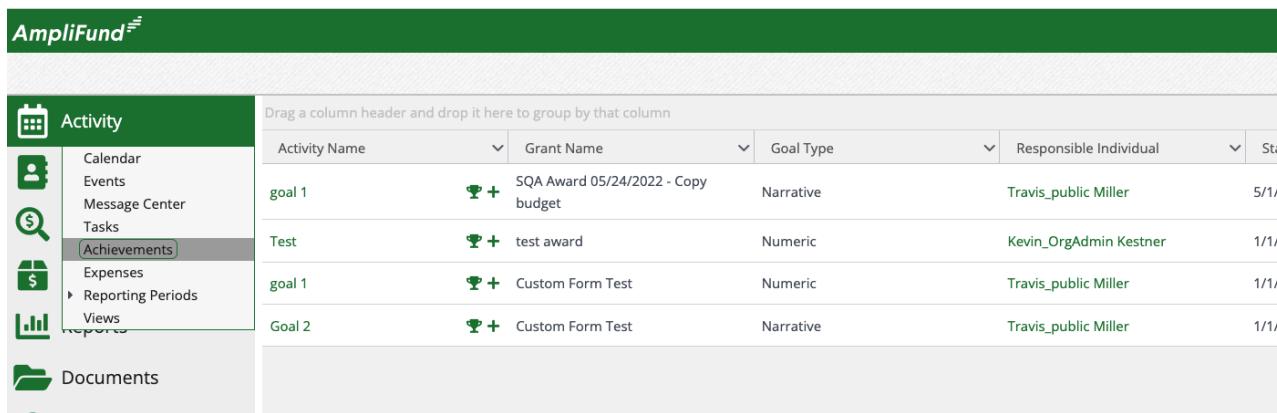
Cancel

AmpliFund Corporate Presentation

Activity Center

Enter Achievements – Activity Center

- Click on Activity > Achievements
- Remember that the Activity Center shows data from the entire Grant portfolio
- Click on the + icon next to the Performance Goal
- Enter the details and click Create
- Ensure the Achievement date is within the reporting period



The screenshot shows the AmpliFund Activity Center. The left sidebar has a green header with the AmpliFund logo. Below it, the 'Activity' section is selected, showing a list of achievements. The 'Achievements' button in the sidebar is highlighted with a green box. The main table lists the following achievements:

Activity Name	Grant Name	Goal Type	Responsible Individual	Status
goal 1	SQA Award 05/24/2022 - Copy budget	Narrative	Travis_public Miller	5/1/2
Test	test award	Numeric	Kevin_OrgAdmin Kestner	1/1/2
goal 1	Custom Form Test	Numeric	Travis_public Miller	1/1/2
Goal 2	Custom Form Test	Narrative	Travis_public Miller	1/1/2

Create Achievement

Grant Custom Form Test

Strategy Strat 1

Goal Type Numeric

Goal goal 1

Description

Responsible Individual Thomas Colgrove

Achievement Date 9/17/2024

Number to be Achieved 5

Number Achieved 0

Notes

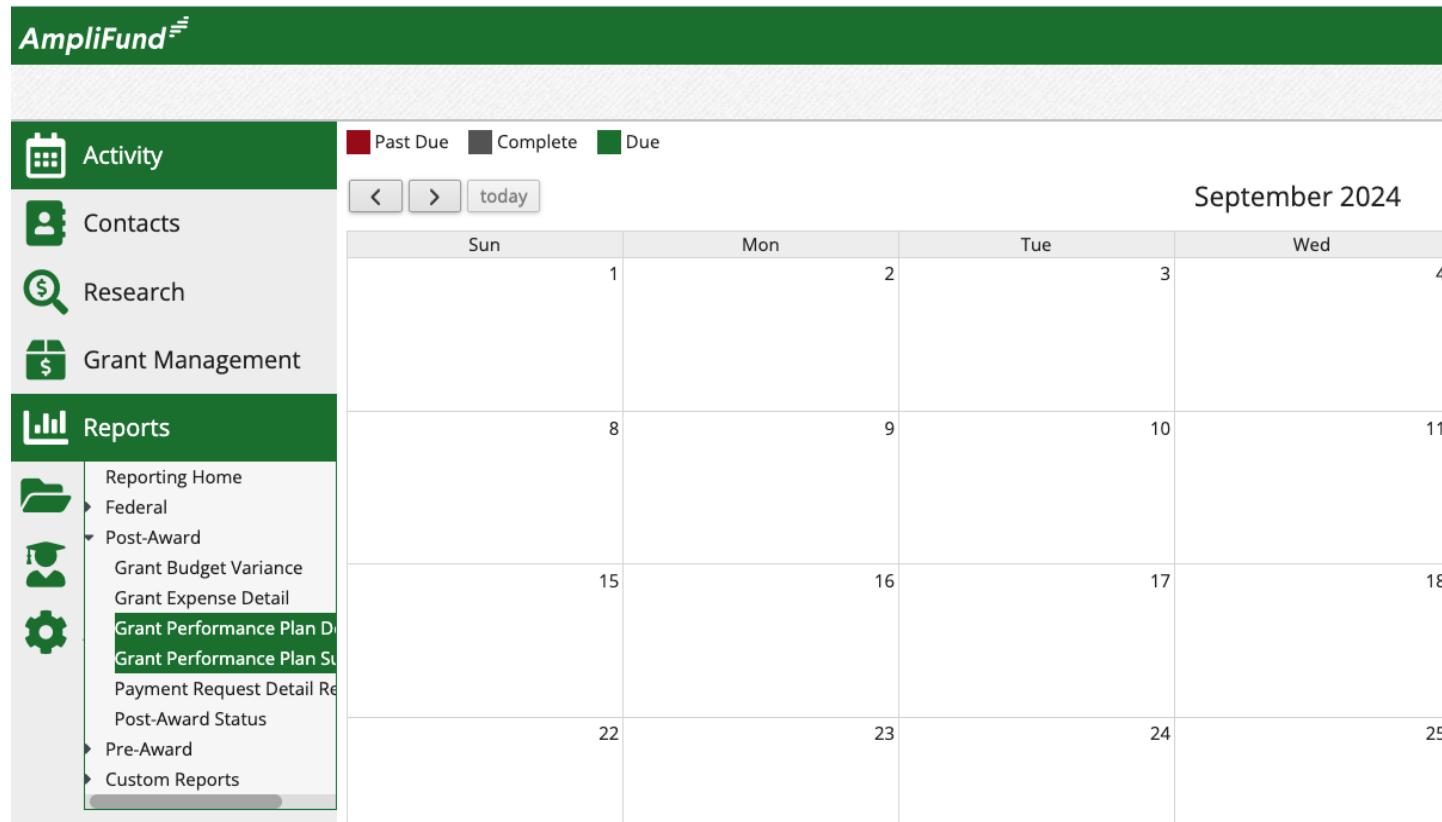
Create

Cancel

Standard Performance Reports

Access Standard Performance Reports

- Click on Reports > Post-Award > Select Grant Performance Plan Detail or Grant Performance Plan Summary



The screenshot shows the AmpliFund software interface. The top navigation bar is green with the AmpliFund logo. The left sidebar has a dark green header with icons for Activity, Contacts, Research, Grant Management, and Reports. The Reports section is expanded, showing sub-options: Reporting Home, Federal, Post-Award, Grant Budget Variance, Grant Expense Detail, **Grant Performance Plan Detail** (which is highlighted in green), Grant Performance Plan Summary, Payment Request Detail Report, Post-Award Status, Pre-Award, and Custom Reports. The main content area shows a calendar for September 2024. The days of the week are labeled: Sun, Mon, Tue, Wed. The dates are: 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25. A legend at the top of the calendar indicates: Past Due (red), Complete (grey), and Due (green).

Filter and Export Standard Performance Reports

- Configure the filters on the right side of the screen
- Click the dropdown next to the Export tab to view export options

AmpliFund

Joe Beyer ▾

Activity

Contacts

Research

Grant Management

Reports

- Federal
- Post-Award
 - Grant Budget Variance
 - Grant Expense Detail
 - Grant Performance Plan Detail**
 - Grant Performance Plan Summary
 - Payment Request Detail Report
 - Post-Award Status
- Pre-Award
- Custom Reports

Grant Performance Plan ...

Export PDF ▾

Export Excel

Export PDF

Export RTF

Export CSV

Grant Performance Plan Detail

Grant Name	Reconnect Broadband Award						
Grant Amount	\$100,000.00						
Numeric							
Goal	Responsible Individual	Achievement Date	Has Attachment	Completed	Number to be Achieved	Number Achieved	Variance
Number of Things to be achieved	Joe Beyer	07/30/2021	No	No	250	30	-88.00%
Achievement Notes	Here is where Grantee Org would enter notes about their achievements.						
Woman/Minority Owned Companies	Joe Beyer	08/27/2021	No	No	Achievement Subtotal	30.00	-88.0%
Achievement Notes	We have contracted with 1 MBE as of 8/27/2021.						
Woman/Minority Owned Companies	Joe Beyer	08/27/2021	No	No	Achievement Subtotal	1.00	-80.0%
Achievement Notes	We have contracted with 1 MBE as of 8/27/2021.						

Grant Performance Plan Detail

Grant Name	FY22 ESLTP Grant - AmpliFund QA						
Grant Amount	\$60,000.00						
Narrative							
Goal	Responsible Individual	Achievement Date	Has Attachment	Completed	Question	Answer	
Address each of the following points: progress on the implementation							

1 / 53 Find...

◀ ▶ ▷ ▸

Filters

Grant Name

All

Goal Type

All

Achievement Date

07/30/2021 12/26/2024

Responsible Individual

All

Columns

Goal Name and Type

Responsible Individual

Achievement Date

Has Attachment

Goal Completion

Goal to Achieve

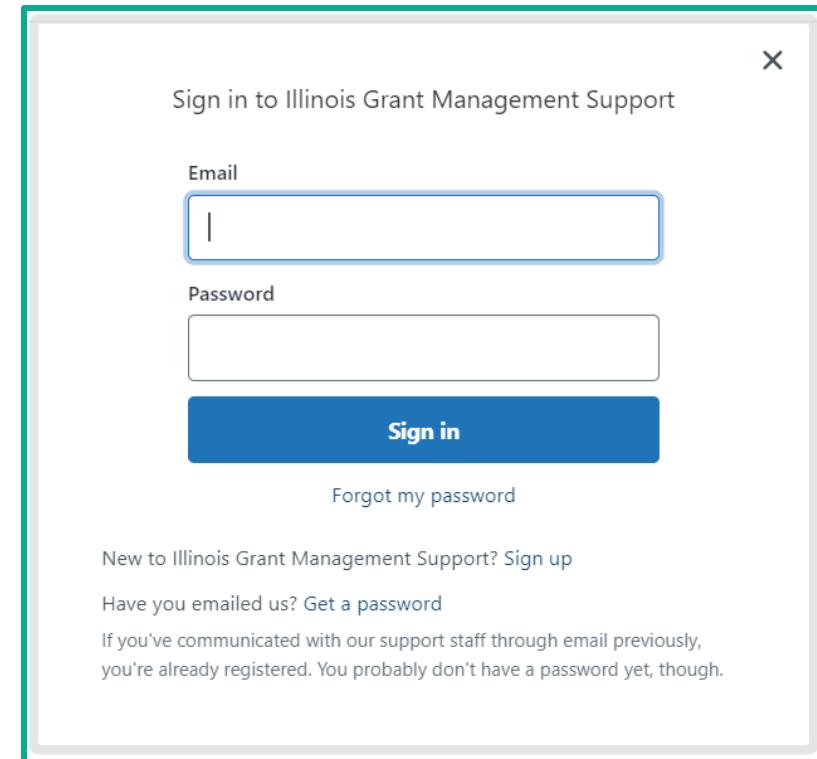
Achievement

Achievement Variance

Customer Support

Create AmpliFund Support Account

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



AmpliFund Illinois Support Portal

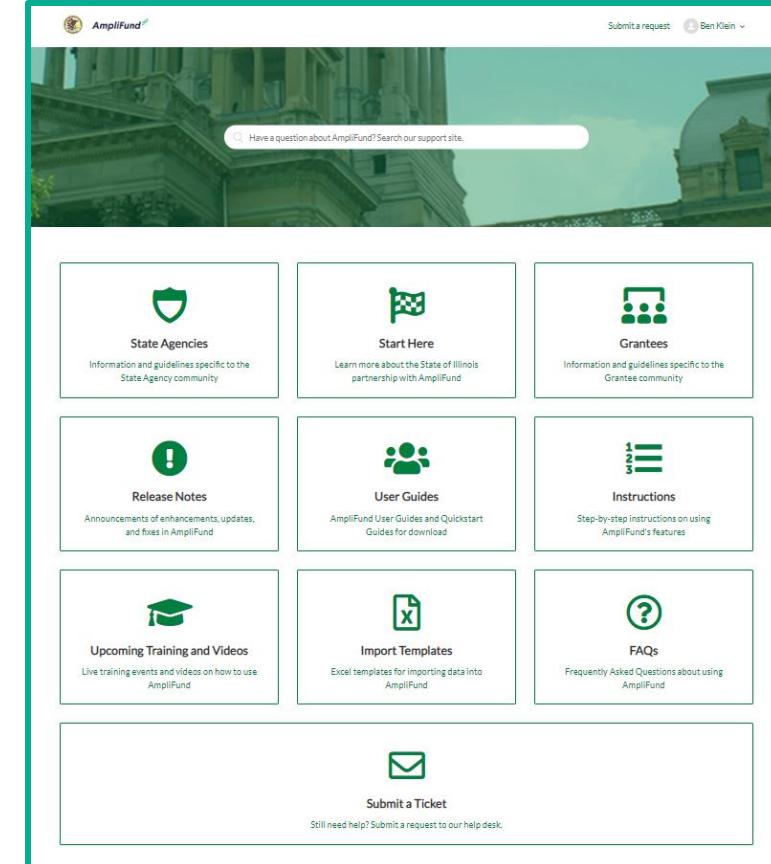


Submit a support ticket:
support@il-amplifund.zendesk.com

Visit the support portal:
<https://il-amplifund.zendesk.com>

Supported Browsers:

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



In-Product Demo

IDOT Resources

GATA Grantee Portal

Navigation and Grant Details

Review Performance Plan

Enter Achievements

Close Performance Reporting Period

Mark Tasks as Complete

Activity Center

Standard Performance Reports

Question & Answer