Euna Grants: Recipient Training

Restore America's Estuaries

Agenda

Goal: *Understand how to view your budget, create expense records and submit Payment Requests.*

1. **Logging into Euna Grants**

2. **Adding Users**

3. **Navigating to your Award**

4. **Budget Navigation and Expense Tracking**

5. **Payment Request**

6. **Editing a Rejected Payment Request**

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Logging into Euna Grants

- Award Activation Email – Account Owner

  - Award Activations will be issued after training and will come from **no-reply@gotomygrants.com**

- All Users with a Security Role of 'Account Admin' can add Users

- Update Recipient Portal **Account Owner** or **Organization Address**

  - Administration (left module) > License Information > Edit Pencil icon > [update information] > Update

#2

#1

#3

#4

Adding Users

- Administration > System Security > Users > **+** icon (top right) > [complete required fields] > Create

- 'Security' section:
  - Being assigned to a Grant will over-ride the access selected except for the Advanced Restrictions information selected.

- 'Staff Information' section (required fields noted with an asterisk)
  - First Name / Last Name
  - Email Address

- Send Email Invite to User (Send Invitation icon)

- **Best Practice Recommendation:** Have <u>at least two</u> 'Account Admin' Users in your Recipient Portal
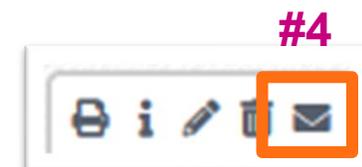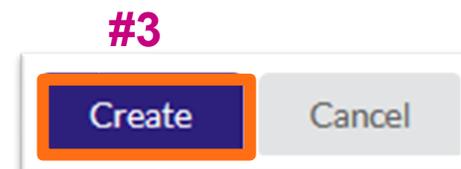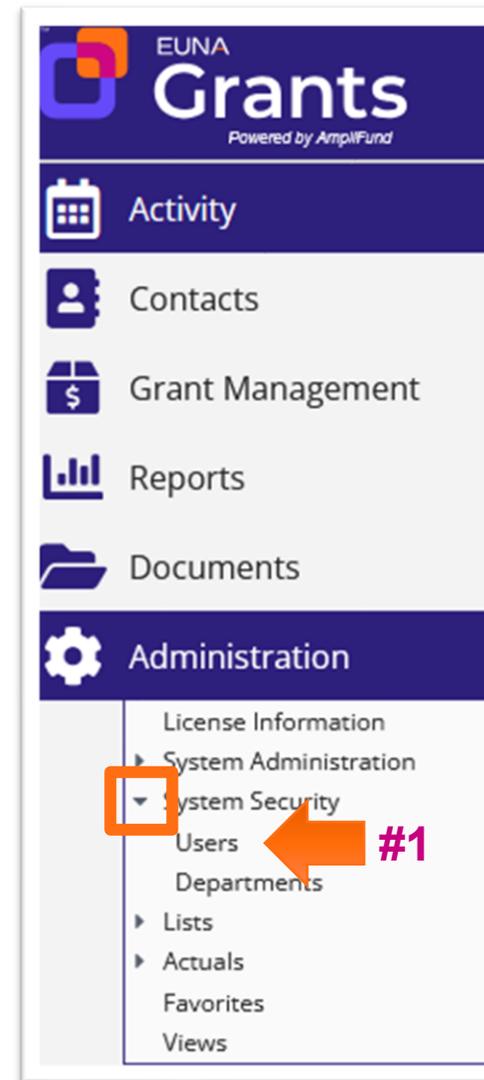
Navigating to your Award & Assigning Recipient Manager

- Navigate to your Award

  o Grant Management (left navigation) > Grants > Click on Grant Name

- Assign Recipient Manager

  o From the Award Details Page > Pencil icon (top right) > [update award details] > Save
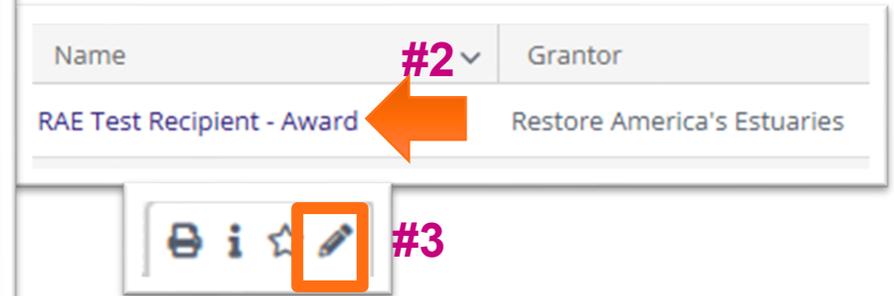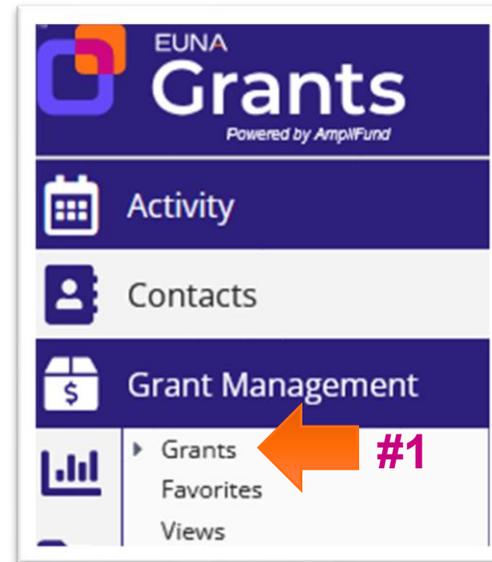
Viewing Budget and Grant Tools

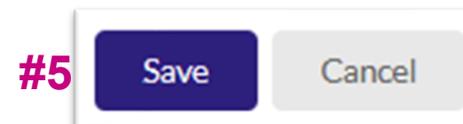- Post-Award management modules can be accessed from the award details page, via the tabs along the top

- Post-Award will lead you to the following:
  - Budget and Expense
  - Payment Requests
  - Grant Tools
    - Email manager
    - Notes
    - Tasks

Details   Analytics   Post-Award ▾   Tools ▾

RAE Test Recipient - Award – Award De

Award Information and Status

Name	RAE Test Recipient - Award
Recipient Name	RAE Test Recipient
Recipient Award Name	RAE Test Recipient - Award
Award Status	Approved
Grant-Funded Amount ⓘ	$25,000.00
Match Requirement ⓘ	$0.00
Total Budget ⓘ	$25,000.00
Expenses To Date ⓘ	$5,526.00
Match Contributions To Date ⓘ	$75.00
Invoiced To Date ⓘ	$14,876.00
Pending Invoices ⓘ	$10,842.00
Approved Invoices ⓘ	$500.00
Cash Received To Date ⓘ	$0.00
Remaining Available Grant-Funded Amount ⓘ	$13,658.00
Remaining Match Requirement ⓘ	($75.00)
Remaining Available Budget	$13,583.00

Tools ▾
- Email Manager
- Tasks
- Documents
- eSignature
- Notes

Post-Award ▾   T
- Financial ▸
- Performance ▸
- Cash Flow ▸
- Management ▸
- Settings ▸

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Budget Overview

- Post-Award (top tab) > Financial > Budget

- 'Show Actuals From' date range defaults to Award Start/End Date, but can be updated

- Select 'Options' to show/hide budget areas.

Test Award – Budget

Start: **1/1/2025**   End: **6/30/2027**

Budget View Settings

Actuals

Show Actuals From   [1/1/2025]   To   [6/30/2027]

Options

Show/Hide

☐ Grant Year   ☑ Line Items   ☐ Assignee(s)   ☐ GL Accounts   ☑ Match   ☑ Actuals ⓘ ☑ Remaining

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- Select 'Line Item' to view:
  - General tab
  - Financials tab (Grant Funds/Cash Match/In Kind Match/Other Funding Sources amounts)
  - Configuration tab (Expense/Indirect Caps/Thresholds)
- The **Actuals** displayed on the budget page include all expenses in the following statuses: **Reviewed, Closed, Payment Requested, or Paid**

Options

Show/Hide

☐ Grant Year ☑ Line Items ☐ Assignee(s) ☐ GL Accounts ☑ Actuals ⓘ ☑ Remaining

Budget

Expense Budget	Grant-Funded Budgeted	Grant-Funded Actuals	Total Budgeted	Total Actuals	Grant-Funded Remaining	Total Remaining
Consultants/Contracts						
Project Consultant $	$5,000.00	$0.00	$5,000.00	$0.00	$5,000.00	$5,000.00
Subtotal	$5,000.00	$0.00	$5,000.00	$0.00	$5,000.00	$5,000.00
Personnel						
Full Time Project Manager $	$10,000.00	$0.00	$10,000.00	$0.00	$10,000.00	$10,000.00
Subtotal	$10,000.00	$0.00	$10,000.00	$0.00	$10,000.00	$10,000.00
Supplies						
Field Supplies $	$5,000.00	$0.00	$5,000.00	$0.00	$5,000.00	$5,000.00
Subtotal	$5,000.00	$0.00	$5,000.00	$0.00	$5,000.00	$5,000.00
Travel						
Conference Fees $	$1,500.00	$0.00	$1,500.00	$0.00	$1,500.00	$1,500.00
Travel Expenses (Lodging, Airfare) $	$3,500.00	$0.00	$3,500.00	$0.00	$3,500.00	$3,500.00
Subtotal	$5,000.00	$0.00	$5,000.00	$0.00	$5,000.00	$5,000.00
Total Expense Budget Cost	**$25,000.00**	**$0.00**	**$25,000.00**	**$0.00**	**$25,000.00**	**$25,000.00**

Revenue Budget	Grant-Funded Budgeted	Grant-Funded Actuals	Total Revenue	Total Actuals	Grant-Funded Remaining	Total Remaining
Grant Funding						
Awarded Amount	$25,000.00		$25,000.00			
Subtotal	$25,000.00		$25,000.00		$25,000.00	$25,000.00

Expense Overview

- View All Expenses

  - Post-Award (top tab) > Financial > Expenses > Run

- All expenses with an Edit Pencil icon are editable

  - Editable expenses can be selected and 'Marked as Reviewed' or 'Deleted' (using the Actions and Select boxes)

- Create Expenses
  - Post-Award (top tab) > Financial > Expenses > Run > + icon (under Actions) > [complete General tab] > [complete Financials tab] > [complete Attachments tab] > Create
- **Generals** tab
  - Select: Category, Line Item
  - Direct Cost = Grant Funds + Cash Match + In Kind Match + Other Funding Amounts
  - Expense Date
  - Expense Status = **Reviewed**
  - Description
- **Financials** tab
  - If applicable, enter Match amounts (Cash Match, In Kind Match, Other Funding Amounts)
- **Attachments** tab
  - Choose File(s) and **attach supporting documentation for each expense**
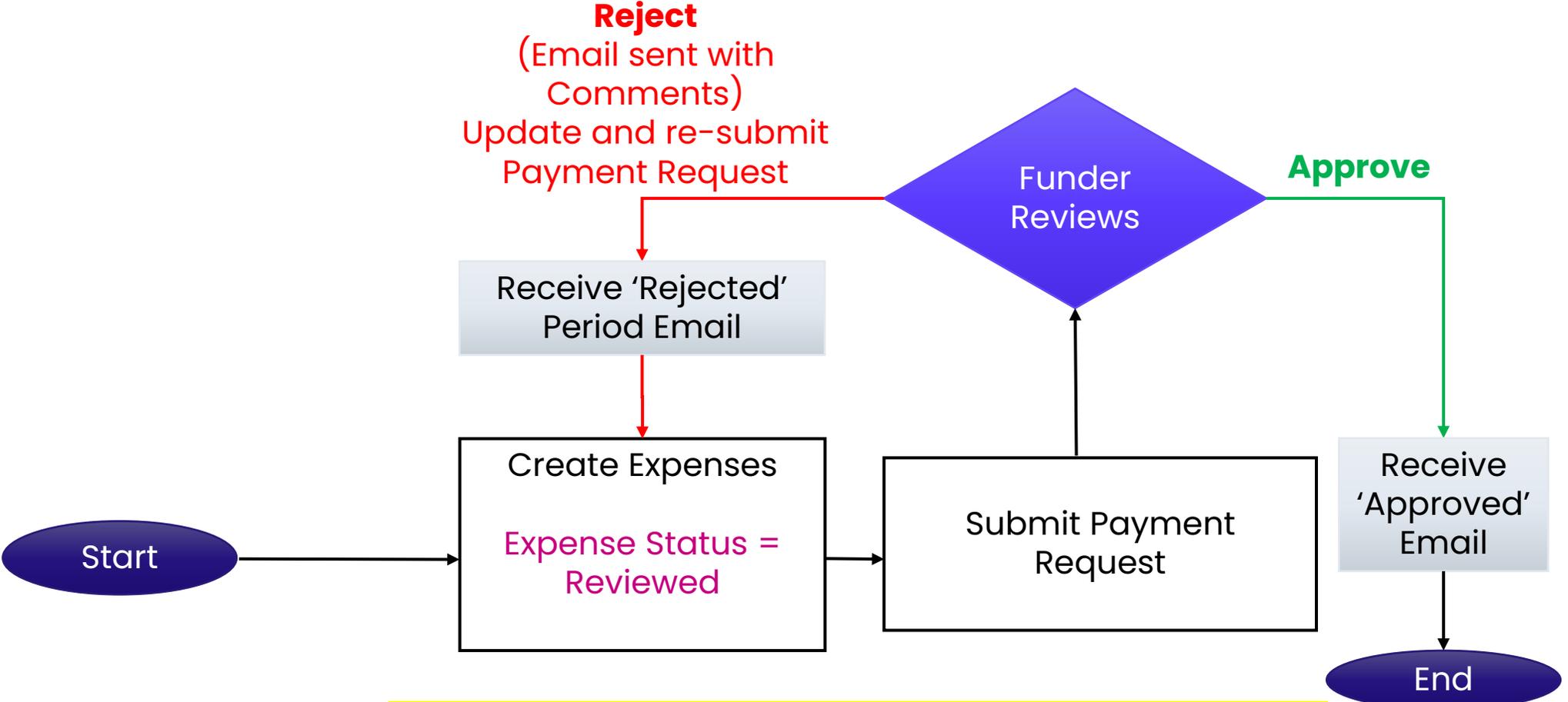
All Expenses

Actions

+ ✔ 🗑

In-System Training

- Adding Users
- Navigating to your Award
- Assigning Recipient Manager
- Award Sections: Details, Tasks, Documents
- Viewing & Understand the Budget

Creating a Payment Request

Reject
(Email sent with Comments)
Update and re-submit Payment Request

Approve

Funder Reviews

Receive 'Rejected' Period Email

Receive 'Approved' Email

Start

Create Expenses

Expense Status = Reviewed

Submit Payment Request

End

NOTE: Recipient Manager receives all Email Notifications

Where to attach documentation?

- Individual Expense <mark>(Required)</mark>
    - o Attachments tab – 'Attachments' field
- Payment Request
    - o Additional Information section - 'Attachments' field
- Budget Reporting Period
    - o Overall Expense Details section - 'Attach Documentation' field

- **What do I need to attach?**
    - o Source Documentation
    - o Proof of Payment

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Scenario #1 – Create & Submit Payment Request

- Recipient Manager will:

  o Track expenses to the budget, with supporting documentation attached to each

  o Ensure expense dates align with the payment request timeframe

  o Submit a Payment Request with Expenses

Expense Date	Category	Line Item	Description	Grant Funds	Cash Match
1/14/25	Consultants/ Contracts	Contract B	Invoice ABC	$500	$0
2/25/25	Construction	Construction	Invoice 123	$1200	$300

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Scenario #2 – Update & Re-Submit Payment Request

- Recipient Manager will:
  - Receive email communication with funder decision
  - Correct and re-submit a Payment Request

- Items to Correct:
  - Missing Documentation
  - Incorrect Line Item chosen
  - Line-Item overdrawn Grant Funds

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Approvals and Rejections

- When a ruling is made on a payment request and tracking period, communication will come from no-reply@gotomygrants.com

Payment
Request
Rejection

Payment
Request
Approval

In-System Training

- Creating Expenses & Submitting Payment Request
- Updating Expenses & Re-submitting Rejected Payment Request

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Questions?

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Customer Support

Access Customer Support

Visit the support site:

https://amplifund.zendesk.com

Submit a support ticket:

support@amplifund.Zendesk.com or in product

Call the help desk:

(844) 407-3572

Customer Support Hours:

8am – 8pm ET, Monday through Friday, excluding holidays

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Support Site – View/Create Support Tickets

1. Go to https://amplifund.zendesk.com

2. Click the **Sign up** link

3. Enter your **full name**

4. Enter your **email address**

5. Click the **Sign up** button

6. A welcome email from support@zendesk.com will be sent to you

7. Click **the link in the email** to set your password and activate your account

Resources – Support Site

Amplifund.Zendesk.com

Euna Grants Recipient Series