Montana Perkins Application Technical Guidance:

Drafting and Submitting an Application in AmpliFund

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Office of the Commissioner of Higher Education

Overview

This document provides instructions and guidance on how to complete and submit your Montana Perkins Local Application in AmpliFund for the 2022-2023 grant year. The guidance includes how to create an AmpliFund account, general navigation instructions, and information specific to Montana that will help you successfully complete your Perkins Local grant application.

For general information on how to navigate and use AmpliFund, please see the AmpliFund Applicant Portal Resources document with instructional videos or visit AmpliFund's support website for additional documentation.

For guidance on the laws, regulations, and requirements applicable to Perkins programs, please see the 2022-2023 Perkins Local Application Guide.

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Table of Contents

Montana Perkins Application Technical Guidance: 1
Drafting and Submitting an Application in AmpliFund 1
Overview 2
Contact Information: 2
1. Creating an account in AmpliFund 4
2. Beginning and drafting your application 5
A. Opportunity Overview 5
B. Project Information 5
Navigation and Progress 5
Application Information 6
Primary Contact Information 6
C. Application Forms 6
Part 1. Additional Contact Information 6
Part 2. Background – Community and Workforce 7
Part 3. Background – Student Populations 7
Part 4. Background – Campus Performance 7
Part 5. Project Narratives 7
Program Assurances 8
D. Budget 8
Budget View Settings 8
Expense Budget 9
Revenue Budget 10
3. Application Submission 10
A. Submission 10

1. Creating an account in AmpliFund

The first time you enter AmpliFund through the Perkins opportunity link, you'll be required to set-up a user log-in and password. Once registered in AmpliFund, you'll be able to fully access the Perkins application.

Directions

1. Click on the Perkins opportunity link provided by OCHE.
2. Click on the open opportunity name, either Perkins Local or Perkins Reserve.
3. Click **Apply** on the far right.
4. Click **Register**. (Once established in AmpliFund, you'll enter by clicking **Login**.)
5. On the Create New Account page you will add your **user information** and **contact information** for yourself as the primary applicant and campus coordinator.

   Organization information should reflect your campus details.
6. Click **Register.**
7. Click **I Accept** to accept AmpliFund's terms and conditions.

Now you're ready to apply for funding!

TIP: INVITING ADDITIONAL USERS TO AMPLIFUND
You can grant editing access to additional users from your campus to your application!

1. Open the applicant portal
2. Click the logo in the top-left corner.
3. Click **Users.**
4. Click **+ Add User.**
5. Add the user's **Email Address.**
6. Select their **Role.**
   a. **Administrator will allow them to create, edit and delete applications.**
   b. **Editors can only edit existing applications.**
7. Provide the new user's **name, mailing address and phone number** in the **Contact Information Section.**
8. Click **Invite.**

2. Beginning and drafting your application

A. Opportunity Overview

Once in the AmpliFund System, review the Perkins Local **Opportunity Information, Funding Information, Award Information, Submission Information, Question Submission Information, Additional Information, and Award Administration Information.**

Most of the overview information will be familiar to coordinators who have worked on past applications. Important dates and times will be identified under **Award Information** and **Submission Information.**

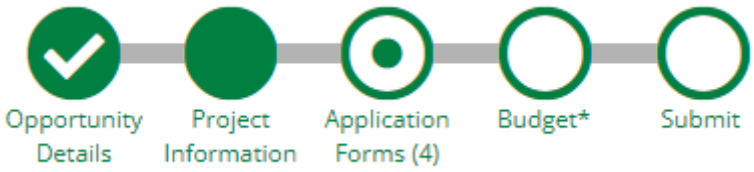
Please find contact information and the Perkins Local Application Guide under **Question Submission Information.**

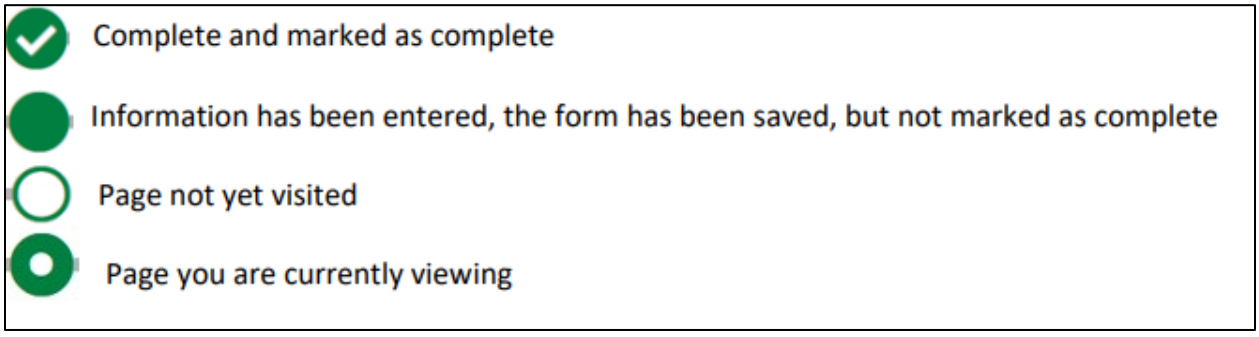
Once you're ready to begin the application, **click "Apply"** in the upper right corner.

B. Project Information

Navigation and Progress

Across the top you'll find five circles tracking your progress through the application. These circles are navigational buttons, allowing you to move back and forth between sections of the application as well as indicating your progress.





In the upper right, you'll find **Help, Download, Save, and Save & Continue.**

Help will take you to a PDF link authored by AmpliFund for further technical support.

Save will save your current progress. Click save often!

Save & Continue will save your progress and advance you to the next section.

At the bottom of each page, you'll find additional **Save** and **Save & Continue** buttons that perform the same functions. You will also find **Mark as Complete**.

Mark as Complete will save the page and mark it as complete, which triggers AmpliFund to alert you to any missed "required" fields or other errors on the page. To submit an application, you must click **Mark as Complete** on all pages. **You can still edit a page that has been marked as complete.**

Application Information

1. **Application Name –** please use the following format "CampusName Local 22-23".

2. **Award Requested –** enter the allocation provided to you by OCHE.

3. Leave **Cash Match Contributions** and **In-Kind Match Contributions** at $0.00.

Primary Contact Information

1. Enter your information as the primary coordinator of the Perkins application.

   There will be an opportunity to provide information for additional contacts on campus, including Fiscal Managers and Reserve Coordinators on a following form.

2. Save and Continue

C. Application Forms

Application Forms are the Perkins specific fields customized by OCHE. The Application Forms include an Additional Contact Information page, three Background pages, a Project Narratives page, and a Program Assurances page.

Part 1. Additional Contact Information

1. **Campus Information**
   Campus Name – Select your campus from the drop down

2. **Campus Fiscal Manager**
   Provide the contact information for the fiscal manager who will be processing Perkins funds disbursement.

3. **Additional Perkins Contacts**
   Provide the contact information for other campus member to be included in notifications of important grant details or issues. Often this includes campus presidents, deans, or other staff members who work closely with Perkins funds, local or reserve.

Part 2. Background – Community and Workforce

1. **Comprehensive Local Needs Assessment**
   Upload your campus's CLNA using the file upload button.

2. **Background Information**
   Answer Background Information questions 1 and 2 using the text boxes provided. Copying and pasting from external documents is OK.

3. **Save and Continue**

TIP: WORKING OUTSIDE OF AMPLIFUND
For ease of use, you may click **Download** in the upper right to view all the required fields in a PDF outside of AmpliFund's system. You can then draft your responses in whatever platform you prefer before copying and pasting back into AmpliFund.

Part 3. Background – Student Populations

1. **Background Information**
   Answer Background Information questions 3, 4, and 5 using the text boxes provided. Copying and pasting from external documents is OK.

2. **Save and Continue**

Part 4. Background – Campus Performance

1. **Background Information**
   Answer Background Information questions 6, 7, 8, and 9 using the text boxes provided. Copying and pasting from external documents is OK.

2. **Save and Continue**

Part 5. Project Narratives

1. **Project 1**
   For your first Project, fill out all fields (**Project Title, Begin Quarter, End Quarter, Project/Program/Purchase Summary, Expected Measurable Outcome(s), CLNA Results Addressed**).

2. **Add Projects**
   You may submit up to 50 projects. To add another project, choose **Yes** to **Would you like to add another project?**

3. **Additional Projects**
   For Project 2 and beyond, complete all fields for the number of projects identified by your campus.

4. **No Additional Projects**
   When you are finished with your last project, choose **No** to **Would you like to add another project?**

5. **Save and Continue**
   Depending on how many projects you have, you may need to scroll down, past a lot of white space, to the bottom of the screen to find the Save, Mark as Complete, and Save and Continue buttons.

Program Assurances

Before submitting your application, please review the Program Assurance Agreement. You may download a copy of the agreement in this section.

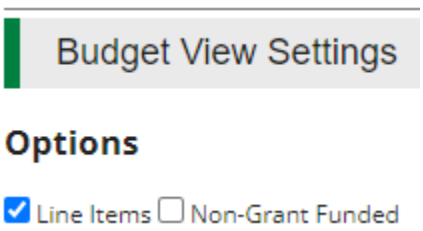
Please upload a signed copy of the Program Assurance Agreement using the **Choose File** button.

Please check the checkbox to acknowledge that you read the Program Assurance Agreement.

D. Budget

Budget View Settings

In the Budget section of the application, you'll see two Budget View Setting **Options - Line Items** and **Non-Grant Funded**. **Non-Grant Funded** does not apply to Perkins and may be de-selected to simplify the applicant view. De-selecting **Line Items** will also simplify your view of the budget by hiding each budget line item under the numbered budget categories.



Expense Budget

Each Perkins budget category is numbered and is listed with a + icon to the left.

Select the + to add a line item to a budget category. The **New Line Item** window should open on your screen showing **Budget Item Information.**

Budget Item Information

- **Category:** This should auto-populate based on the category line selected. You may change the category if you mistakenly chose the incorrect category.
- **Item Type:** Choose Personnel if the **Category** is **Salaries, Hourly Wages,** or **Employer Paid Benefits**. For all other categories choose **Non-Personnel**.
- **Name:** Please enter *Project # - descriptive name*. (For example, Project 5 - Welding Instructor salary, or Project 2 - Nursing lab equipment.)
- **Direct Cost:** Enter the budget cost for the line item.
- **Narrative:** Follow directions for the budget narrative listed under **Category** to provide any additional context needed to approve the line item.
- **Create**: Click the **Create** button save your line item. Choose **Cancel** to close without saving.

You may enter as many line items as you need. Select the + to add additional line items to a budget category.

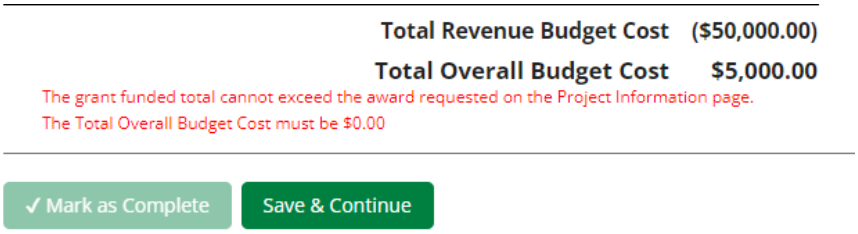
Editing/Deleting Line Items

- After adding a line item, use the Pencil Icon to edit it.
- After adding a line item, use the Trash Can Icon to delete it.

TIP: EXPORTING YOUR BUDGET
When you are done with your budget or if you want to look at your budget in another format, choose the **Download** button to download a copy of your application, including the Budget in Excel format.

Revenue Budget

In the Revenue Budget section, you'll see two smaller sections: **Grant Funding** and **Non-Grant Funding**. **Non-Grant Funding** does not apply to Perkins, so you can ignore that section. The **Grant Funding** section shows the **Award Requested** amount you entered on the **Project Information** page at the beginning of the application.



TIP: TOTAL OVERALL BUDGET COST
Your **Total Overall Budget Cost** must be $0.00. This means that you must account for all the dollars in the award allocated/requested in order to submit your complete application. **In other words, the Total Expense Budget Cost must match the Award Requested.** As you enter line items into your budget, the **Total Overall Budget Cost** will automatically update. The **Mark as Complete** button will remain grayed-out until the **Total Overall Budget Cost** is $0.00. You can still **Save & Continue** if you are under- or over-budget.

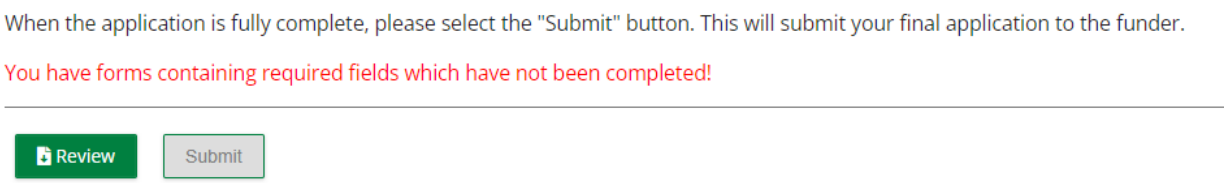
When you are finished with your budget and line items, remember to **Save & Continue**.

3. Application Submission

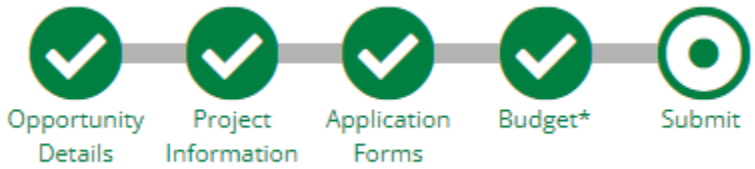
A. Submission

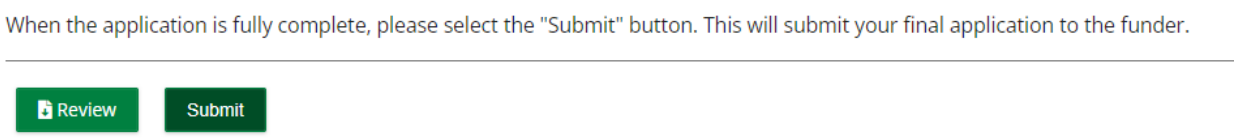
Ready to submit your application? The first step is to make sure you clicked Mark as Complete on each section.

On the Submit screen, an application that is not ready to be submitted will have red text telling you that you have pages that are not complete or do not have all of the required information entered. The **Submit** button will be grayed out.



An application that is ready to submit will have check marks in the first four of the five large circles at the top. And the Submit button will be clickable.





Before submitting, use the **Review** button to download a copy of your application, if needed. You can also download your application after submitting it.

Click **Submit** to submit your Perkins Local application. You will receive an e-mail notification indicating that you successfully submitted your application.

You will receive future e-mail notifications if your application is reopened, approved, or awarded.