**Core Concept: Achievement Entry**

|  |
| --- |
| Script   |
| Welcome to the AmpliFund Core Concept video focused on Entering Achievements into Performance Plans.  |
| The performance plan functionality in AmpliFund allows you to build your performance plan goals, add progress to each goal throughout the lifecycle of your grant, close out tracking periods as you report back to your funder and mark goals as complete.  |
| Today, we’ll be covering how to add progress to your goals.  In a future Core Concept video we’ll review how to review and close out tracking periods and how to mark a goal as complete.  |
| Let’s jump into AmpliFund and get started.  Once you log in there are a couple of ways to get to your performance plan to enter an achievement.  Let’s point out each one before we get started.  First you could go to Activity, then Achievements.  |
| That will take you to a list of your performance goals, and with the plus icon you can add an achievement.  |
| Another way to add an achievement is by navigating to your grant, then clicking on the analytics tab, then on the right side you have a plus icon next to achievements.  |
| Finally, another way to get to your performance plan and enter your achievements, would be to navigate to the grant by clicking on Grants, Selecting the specific grant you are going to work on, then clicking on Post Award>Performance>Performance plan.  This takes you to a screen of your goals for that particular grant.  Click on the trophy icon to add an achievement.  |
| We’ll start by adding an achievement for our milestone goal of conducting a meeting.  I clicked on the trophy icon and then can enter my achievement by clicking on the plus icon.  |
| The achievement date pre-populates to today’s date, you may need to adjust that if you are entering a date that has already passed.  On the screen, I have the option to mark as complete, enter notes and add any attachments.  Let’s say I scheduled this meeting and sent out the agenda.  I can add that to the notes and upload the agenda, with AmpliFund you have access to unlimited document storage, so feel free to upload as many relevant documents as you have.  You can leave this goal open until the meeting actually takes place.  |
| After I click create, I’m taken to a list of my achievements against this particular goal.  From this screen I can edit the achievements via the pencil icon or add another achievement via the plus sign in the top right icon toolbar.  |
| Let’s navigate back to our performance plan by clicking on performance plan at the top.  I’ll add another achievement for our second goal which is the numeric goal of caring for 100 participants.  Again, here I’ll click the plus sign and begin to enter my achievement details.  After I’ve entered the details of my progress, I’ll click on create.  |
| Through this Core Concept video you’ve learned how to enter an achievement against a performance plan.  If you have any additional questions on achievements, please visit our support site.  Thank you!  |