**Core Concept: Tracking Periods and Task Completion**

|  |
| --- |
| Script   |
| Welcome to the AmpliFund Core Concept video focused on creating and closing a tracking period and marking a task as complete.  |
| 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 you could create a tracking period for when reporting is due to your funder, how to close out a tracking period and how to mark the tracking period task as complete.  |
| Let’s jump into AmpliFund and get started.  Once you log in we’ll navigate to our grant by going to Grant Management then Grants.  Then we’ll select the relevant grant where we want to complete funder reporting.  |
| The first action we need to complete is going to our grant settings and configuring when performance reporting is due to our funder.  I get there by going to Post Award> Settings> Grant Settings.  |
| Let’s update the grant settings by clicking on the pencil icon in the top right icon toolbar.  I’m going to update that I send my funder performance reports quarterly and that they are due 15 days after the quarter end.  Configuring these settings will allow you to create a tracking period summary and will also create a task for the grant manager for each due date.  The task will appear in their tasks list under the activity center and on their calendar.    |
| Now that I have that set up, I’ll go to Post Award>Management>Tracking Periods.  |
| I’ll click the plus icon in the top right icon tool bar to enter my first tracking period.  |
| Next, this screen will appear and I can select if I’m creating a tracking period for expenses or achievements.  Since today we are working on Achievements, we’ll just select that.  From there I have a time period drop down these are based on what you’ve set for your tracking periods in the grant settings.  Since I’m reporting out our first quarter I’ll select that one and hit save.  |
| This takes me to my tracking period report page, where I can see what is entered in this period and add notes or additional documents.  If I select save it will save my tracking period for later or close will close out this tracking period and I won’t be able to edit achievements any further during this time period.  Organizational admins can unlock tracking periods for additional edits.  |
| If I navigate back to the tracking periods page I can see all the different tracking periods I’ve started or closed.  |
| Next, I need to close out the task associated with my tracking period.  I’ll navigate to the tasks list under Activity and then find the relevant task.  I can quickly mark as complete on this screen via the plus icon or I can click into the task to review the details then can click on the check box in the top right to mark as complete.   |
| Through this Core Concept video you’ve learned how to create and close a tracking period and mark a task as complete..  If you have any additional questions on performance plan tracking periods, please visit our support site.  Thank you!  |