# Core Series Recipient 2 – AmpliFund Navigation and Performance Reporting

**We will start 2 minutes after the hour!**

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# Recipient Core Series

- Day 1 – Applicant & Recipient Core Series: AmpliFund Applicant Portal: Application Overview and Submission

- Day 2 – Applicant & Recipient Core Series: AmpliFund Navigation and Recipient Performance Reporting

- Day 3 – Applicant & Recipient Core Series: Recipient Financial Reporting

- Day 4 – Applicant & Recipient Core Series: Advanced Recipient Management and Tools

- Day 5 – Applicant & Recipient Core Series: State of Illinois Unique Applicant & Recipient Configurations

# Agenda

- Navigation
- Master Data
- Grant Details and Settings
- Review Performance Plan
- Enter Achievements
- Close Achievement Reporting Period
- Standard Performance Report
- Activity Center and Tools
- In-Product Demo
- Key Concepts
- Customer Support
- Question and Answer

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# Navigation

# Award Activation Email

- AmpliFund sends an automatic email notification when your Grant is Activated

- Click on the login link to log into AmpliFund

- Click on the use "this link" option if you have never used AmpliFund before

# Log Into AmpliFund

# Navigation Elements



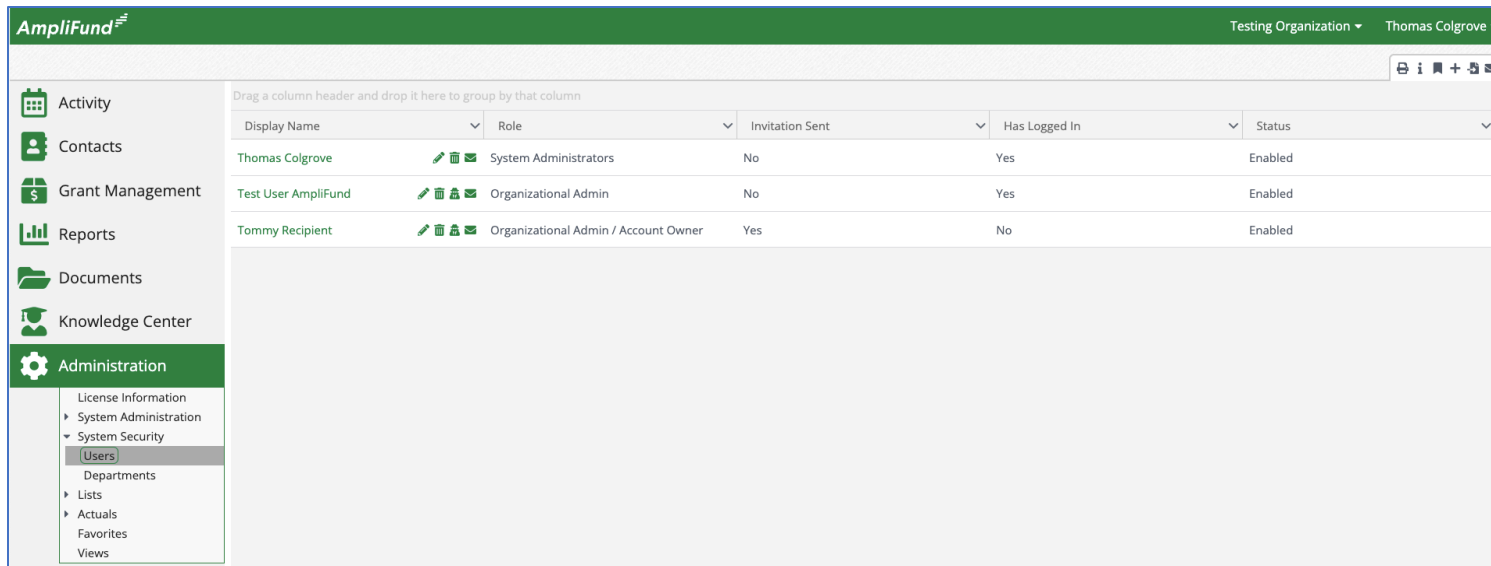**Left Navigation** – shows on every page.

**User Navigation** – dropdown includes options for account information, change password, message center, support, terms and conditions, applicant portal, and logout.

**Options Toolbar** – displays icons to perform functions available on the current page, icons vary based on page.

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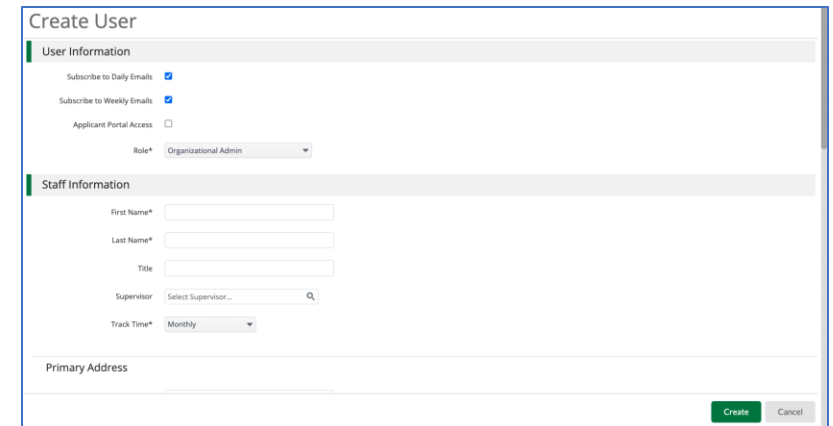
# Master Data

# Add User

- Click on Administration > System Security > Users
- Click on the + Icon on the top right of the screen
- Complete the User Information Section
- Complete all required fields marked with an *
- Click Create on the bottom right of the screen
- Click on the envelope icon to invite them into AmpliFund

# Change Account Owner

- Click Administration > Liscense Information
- Click on the pencil edit icon on the top right of the screen
- Update the Primary Admin User
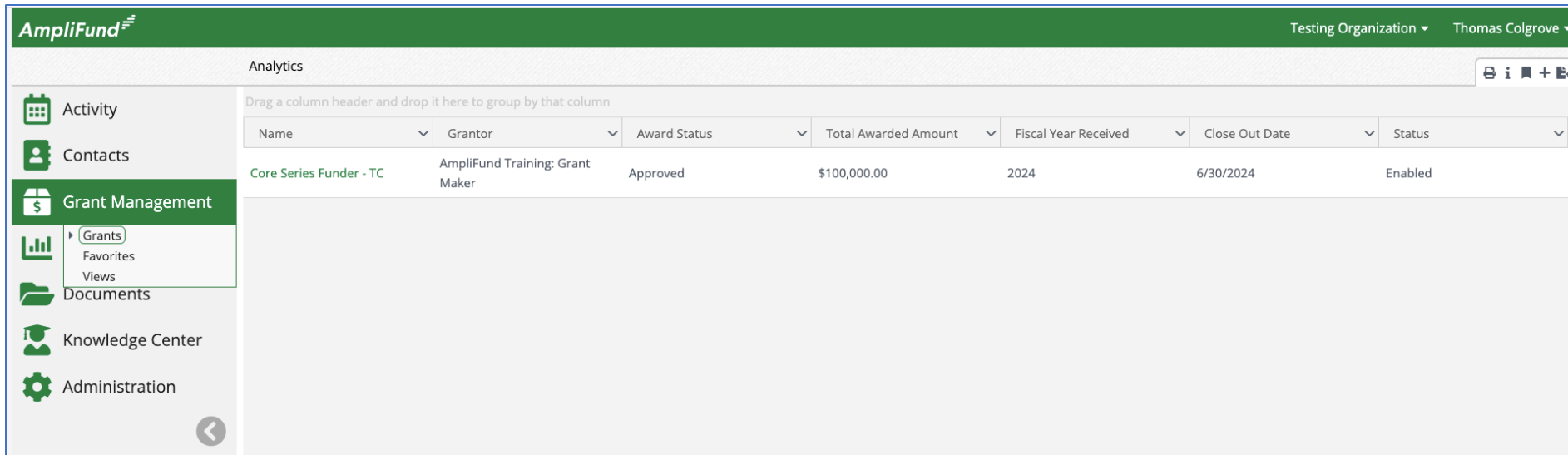- Click update on the bottom right of the screen

# Grant Details and Settings

# Access Grant Details

- Click on Grants Mangement > Grants to access a list of all Grants
- Select the desired Grant and land on the Grant Details page
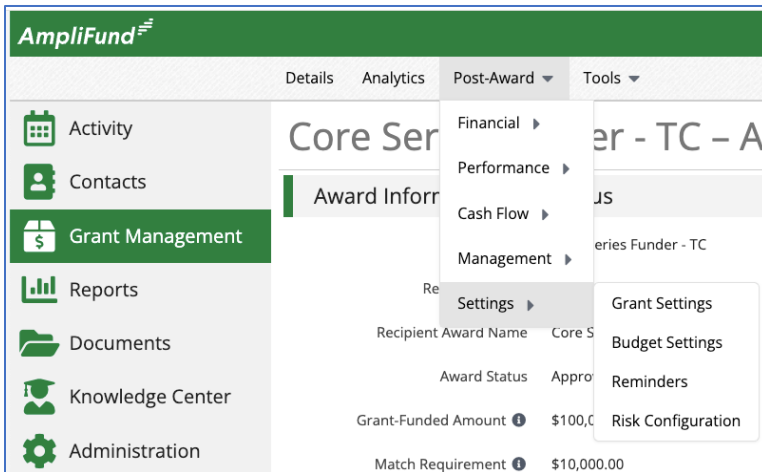  - Most of the Post-Award processes start from the Grant Details page

# Review Grant and Budget Settings

- From the Grant Details page click on Post-Award > Settings and open the Budget and the Grant Settings in a new tab and review
  - Your funder configures the settings

# Update Grant Details

- Click on the pencil edit icon on the top right of the screen
- Update the Recipient Grant Name – Optional
- Update the Recipient Grant Manager – Required
  - Pulls from a list of Users in your account
- Update the Recipient Description – Optional
- Click Save on the bottom right of the screen

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# Review Performance Plan

# Grant Overview

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Plan Budget and Performance
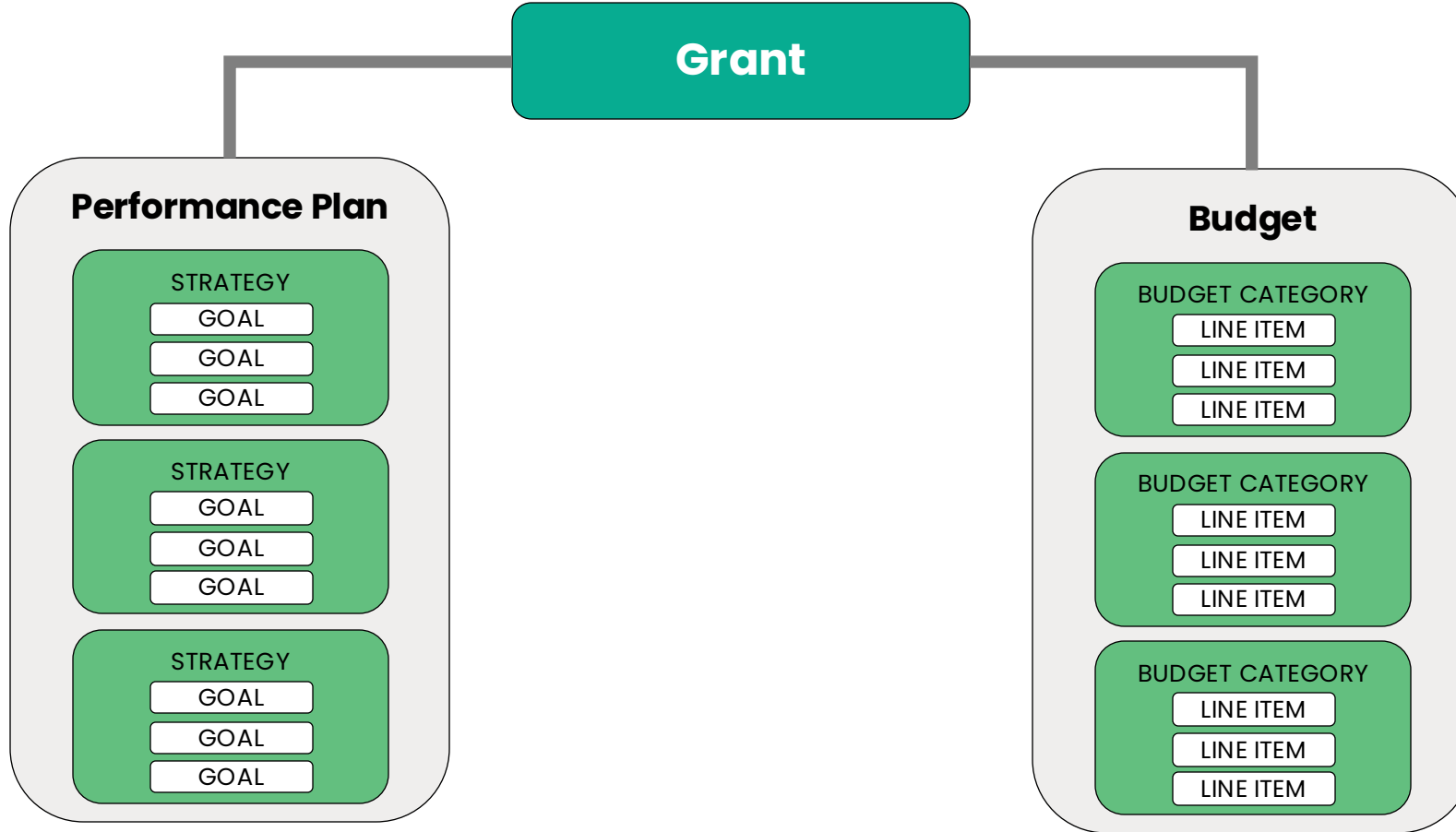
# Performance Plan: Goal Types

| Goal Type | Definition | Example |
|---|---|---|
| Milestone | The most basic goal type. They allow for tracking progress as a "Yes" or "No" response by the Responsible Individual. | Create and send Q1 Staff Survey. |
| Narrative | Question and answer goals. Responsible Individuals may answer the question posed by the goal. | How successful was the grant-related activity this period? |
| Numeric | A discrete number to achieve. As units of the goal are completed, Responsible Individuals may record units completed. | "Number of program participants" with a goal target of 50. |

# Performance Plan: Goal Types

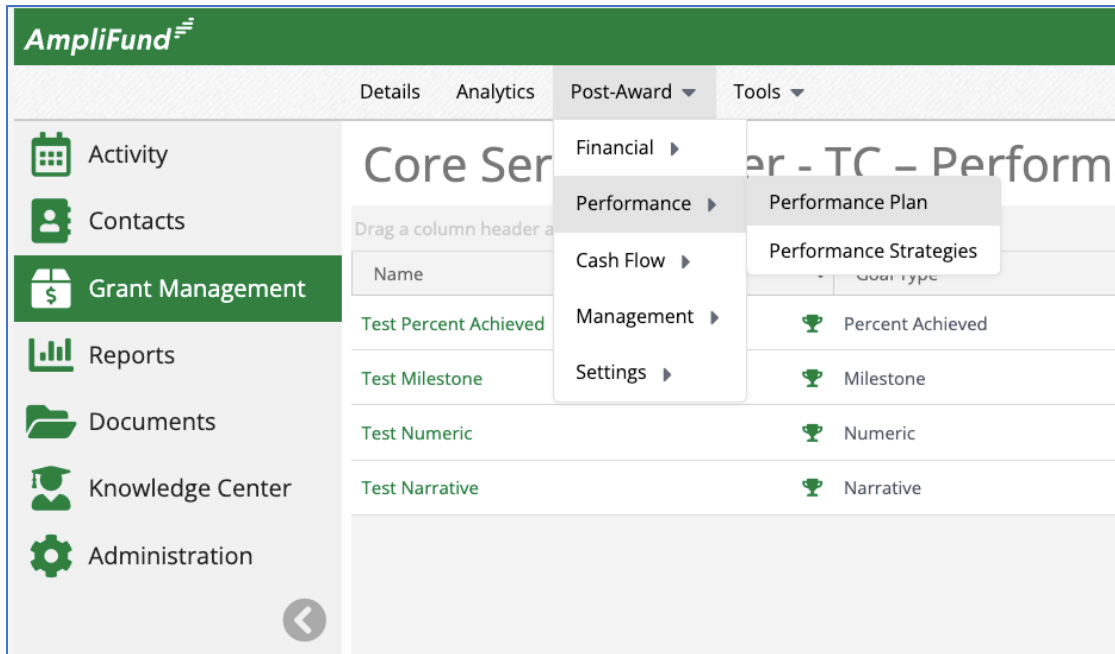| Goal Type | Definition | Example |
|---|---|---|
| Percent Achieved | Goals to reach a desired percent. When tracking progress against a percent achieved goal, Responsible Individuals may capture Total Possible and Total Achieved percentages. | "Volunteer Retention Rate" with a goal target of 70%. |
| Percent Changed | Goals to track a percent increase or decrease. Percent change goals are defined with a starting percent and a desired percent. When tracking progress against a percent change goal, Responsible Individuals may capture Total Possible and Total Achieved percentages. | "Decrease in Student Absences" with a starting absentee rate of 10% and a goal absentee rate of 3%. |
| Reimbursement | Goals with a discrete unit to achieve, and a dollar rate associated per unit. When tracking progress against a reimbursement goal, Responsible Individuals may enter Units Achieved. | "Number of Patient Screenings" with target/maximum units of 100, and a reimbursement rate per unit of $22. |

# Performance Plan – Goals

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## Manage Performance Plans

PERFORMANCE PLAN

STRATEGY

GOAL

*Goal Name*

*Goal Value*

*Responsible Person*

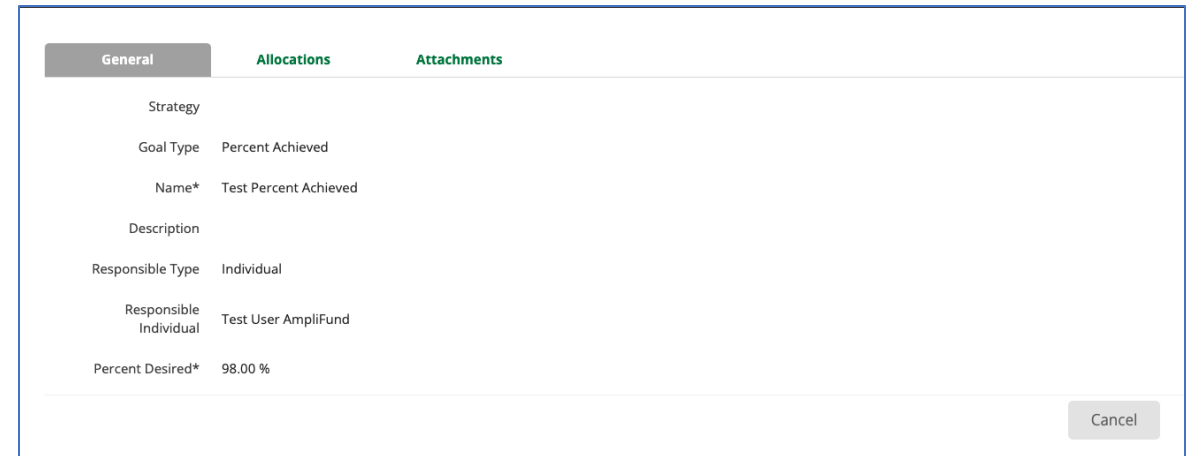*Time Allocation**

*Supporting Documentation*
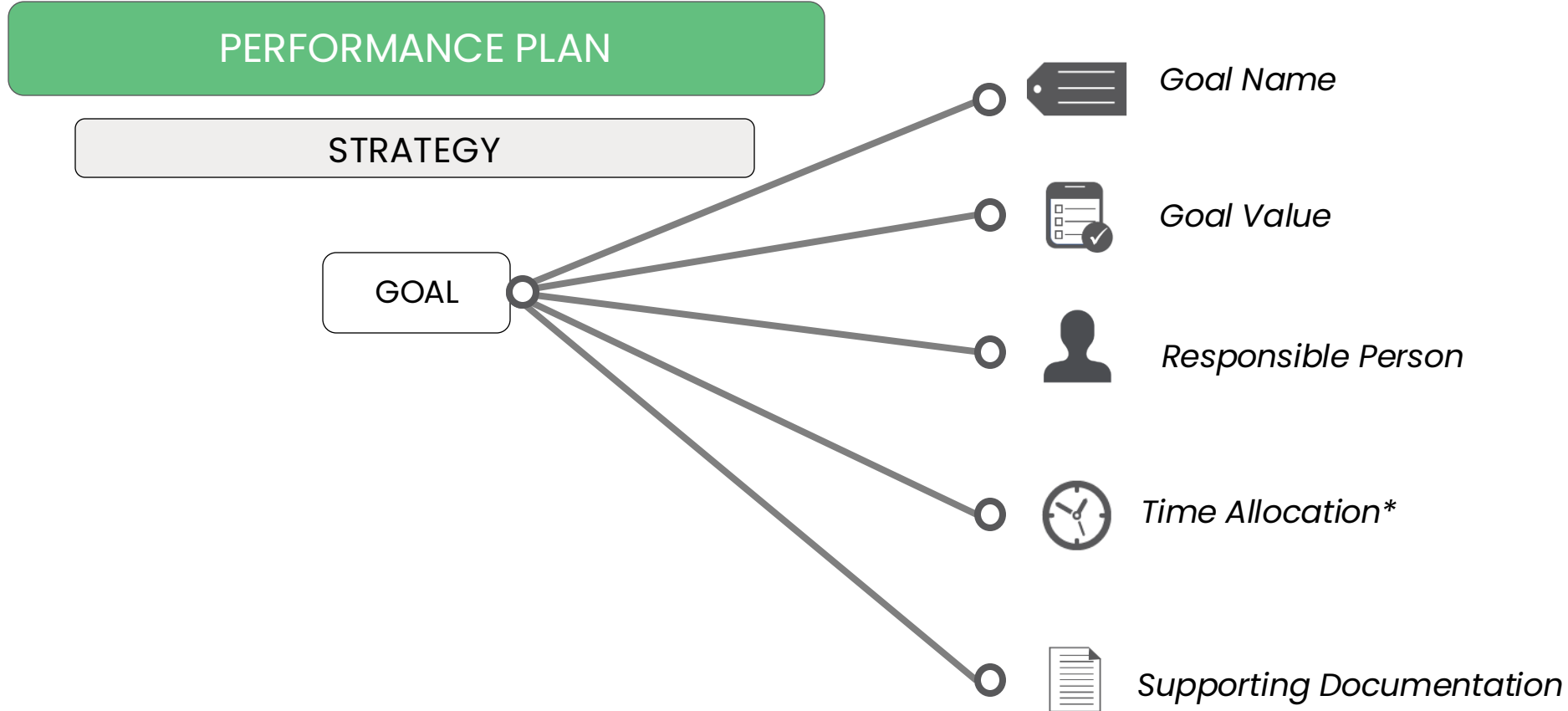
*Allocations available for Narrative, Numeric, Percent Achieved, Percent Changed, and Reimbursement Goal types

# Access Performance Plan and Review Goals

- From the Grant Details page click on Post-Award > Performance > Performance Plan

- Click on the Performance Plan goal to review the details

- Check the Allocations and for Attachments

# Enter Achievements

# Performance Plan: Achievements

## Manage Performance Plans



PERFORMANCE PLAN

STRATEGY

GOAL

Achievement

Item Completed*

Date Completed

Notes

Supporting Documentation
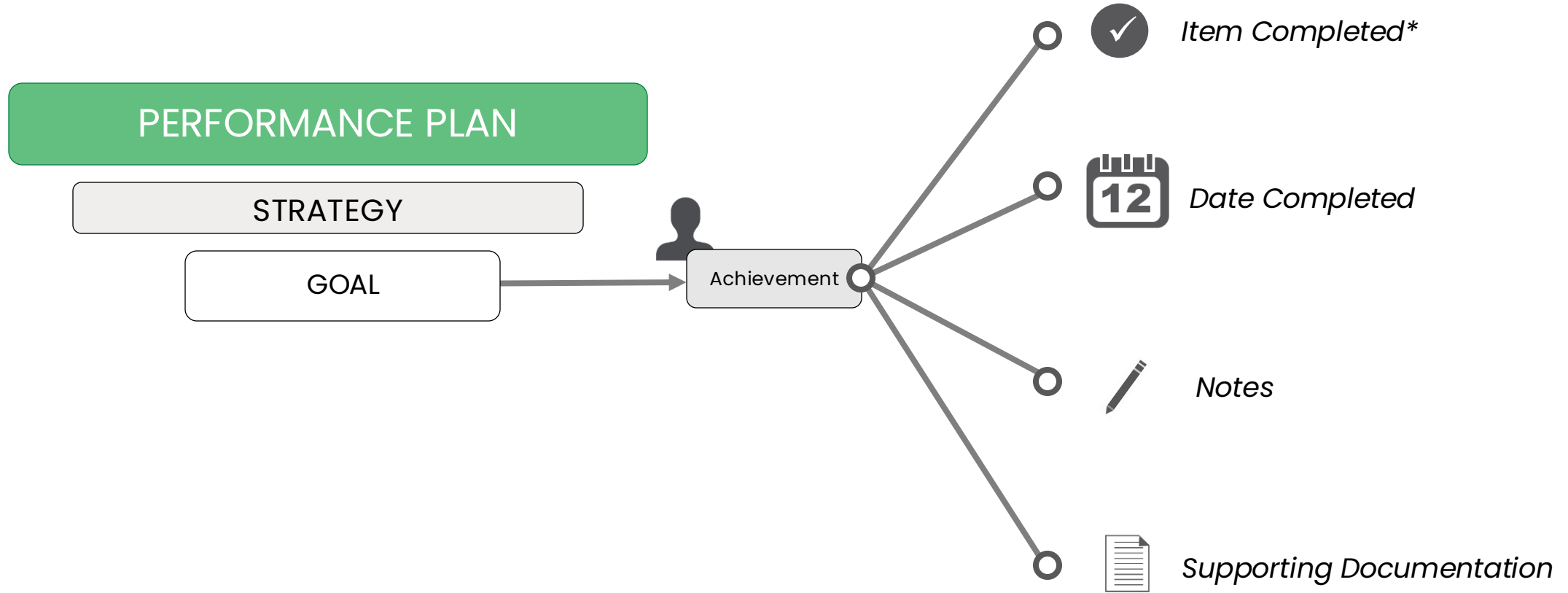
*Item completed formatting is determined by goal type: i.e. a number completed, an answer to a question, etc.
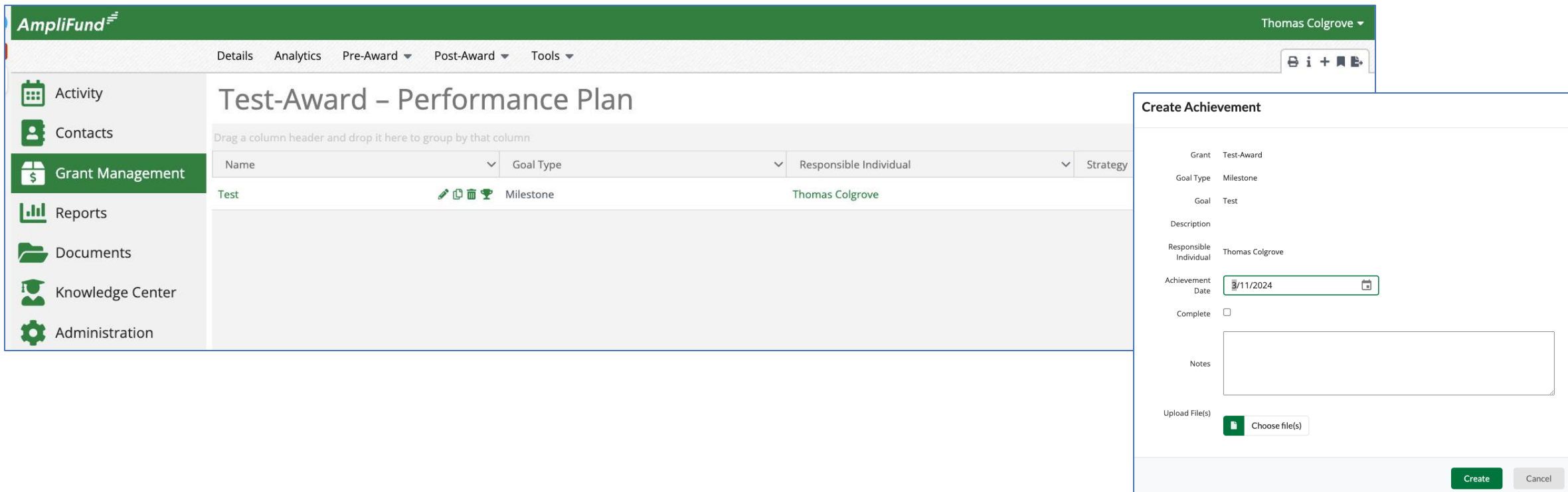
# Enter Achievements

- Click on the Trophy icon next to the Performance Plan Goal

- Click on the + Icon next on the top right of the screen

- Click on the Performance Plan on the top left of the screen to get back to the Performance Plan list

# Close Achievement Reporting Period

# Access Reporting Periods

- From the Grant Details page click on Post-Award > Management > Reporting Periods

- Click on the + Icon on the top right of the screen

- Select Achievements

- Select the Reporting Period

- Click Save on the bottom right of the screen

# Close Reporting Periods

- Attach documents as needed
- Check that Achievements are pulling into the Reporting Period
- Click the Close button on the bottom right of the screen to submit to your funder
- Clicking Save will create the Reporting Period but does not submit it to your funder

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Start: 7/1/2023    End: 7/31/2023

Status: Rejected

**Achievements** ⊙

### Overall Achievements Details

| | |
|---|---|
| Number of Goals with No Achievements | 1 |
| Comments | |
| Attach Documentation | Attach Documentation<br>📄 Choose a file 🗑 |

### Achievements Analytics

| Goal | Type | # of Achievements Period to Date |
|---|---|---|
| Test Percent Achieved | Percentage Achieved | 0 |
| Test Milestone | Milestone | 1 |
| Test Numeric | Numeric Goal | 1 |
| Test Narrative | Narrative | 1 |

### Achievements Closeout

Select All ☑

| Select | Goal | Goal Type | Description | Last Achievement |
|---|---|---|---|---|
| ☑ | Test Milestone | Milestone | | 7/31/2023 |
| ☑ | Test Numeric | Numeric Goal | | 7/31/2023 |
| ☑ | Test Narrative | Narrative | | 7/31/2023 |

Cancel   Close   Save

# Navigate back to the Reporting Period List Page

- After Closing click on the Reporting Periods tab on the top left of the Reporting Period page to access the list of all Reporting Periods for this Grant

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# Standard Performance Reports

# Performance Plan Detail and Performance Plan Summary Report

- Click on Reports > Post-Award
  - Performance Plan Detail
  - Performance Plan Summary

- Configure the Filters from the column on the right side of the page
  - Filter by All, Grant, Responsible Individual, Achievement Date, and Goal Type

- Click the Export PDF tab to export as
  - PDF, Excel, RTF, CSV

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# Activity Center and Tools

# Activity Center – Achievements
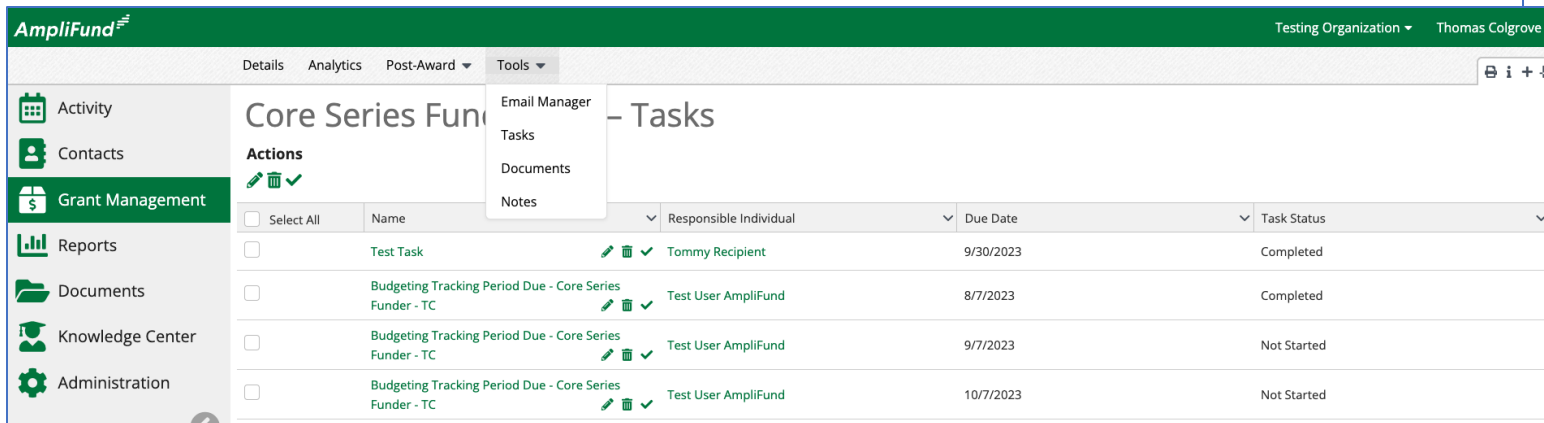
- Click on Activity > Achievements for a shortcut to entering Achievements

- All Performance Plan Goals for all Grants are listed here

- Drag the Grant Name Colum into the row of the page

- Click on the bookmark icon on the top right of the screen to save this view

- Click Activity > Views to access the view later

- Click on the + icon next to the desired Performance Plan Goal to add an Achievement
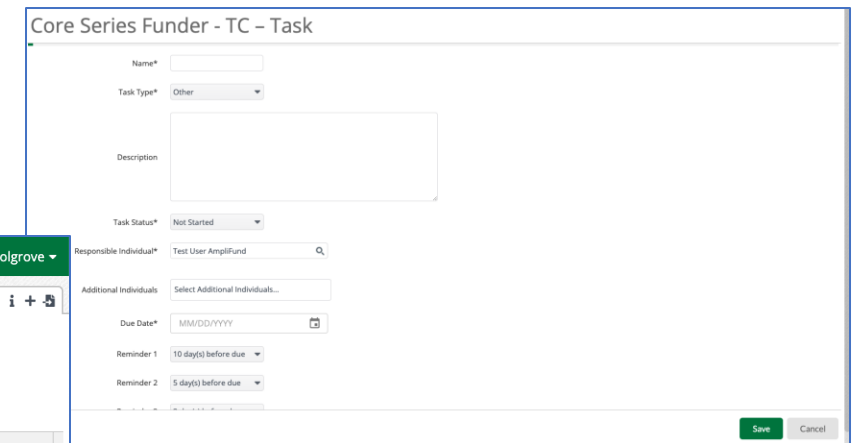
# Tools –Tasks

- There are auto-generated standard tasks for Budget and Performance reporting requirements that you must mark as complete
  - Click on the checkmark icon next to the Task to mark as complete

- You can create Tasks and automatic reminders for yourself or other Users in your account
  - Click on the + icon on the top right of the screen
  - Enter all required information
  - Configure reminders
  - Click Save on the bottom right of the screen

# Admin and Support

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## In-Product Demo

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# Key Concepts

# Key Concepts

- Basic AmpliFund Navigation

- Review Grant Settings

- Update Grant Details

- Performance Reporting
  - Performance Plan
  - Achievements
  - Reporting Periods
  - Standard Reports
  - Activity Center and Tools
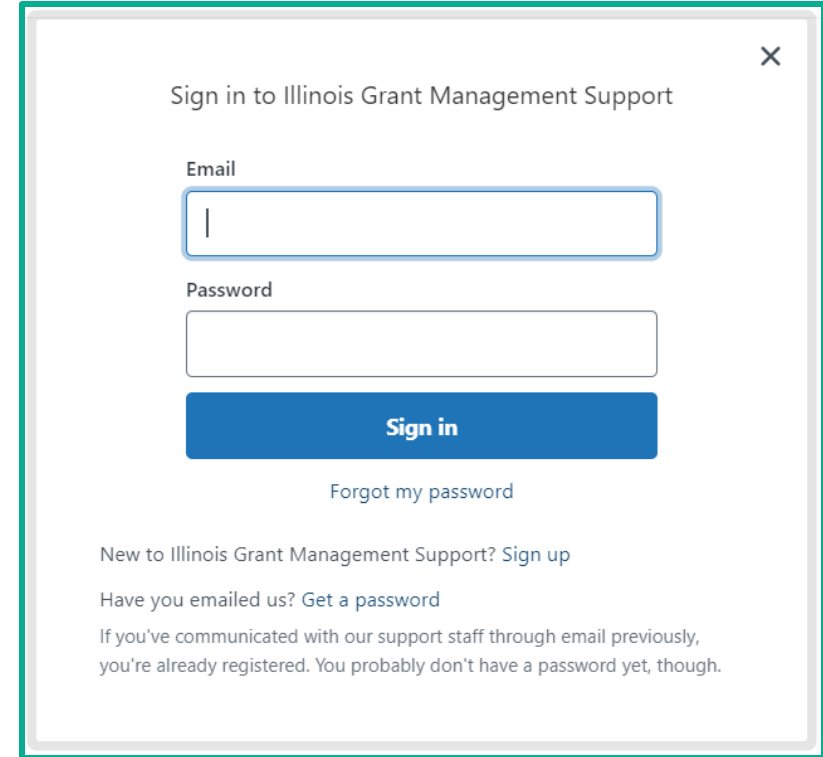
*Next Session: Financial Reporting*

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# Customer Support

# Create AmpliFund Support Account

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1. Go to the appropriate support site
   - https://amplifund.zendesk.com
   - https://il-amplifund.zendesk.com
   - https://ne-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

Sign in to Illinois Grant Management Support

Email

Password

**Sign in**

Forgot my password

New to Illinois Grant Management Support? Sign up

Have you emailed us? Get a password

If you've communicated with our support staff through email previously, you're already registered. You probably don't have a password yet, though.
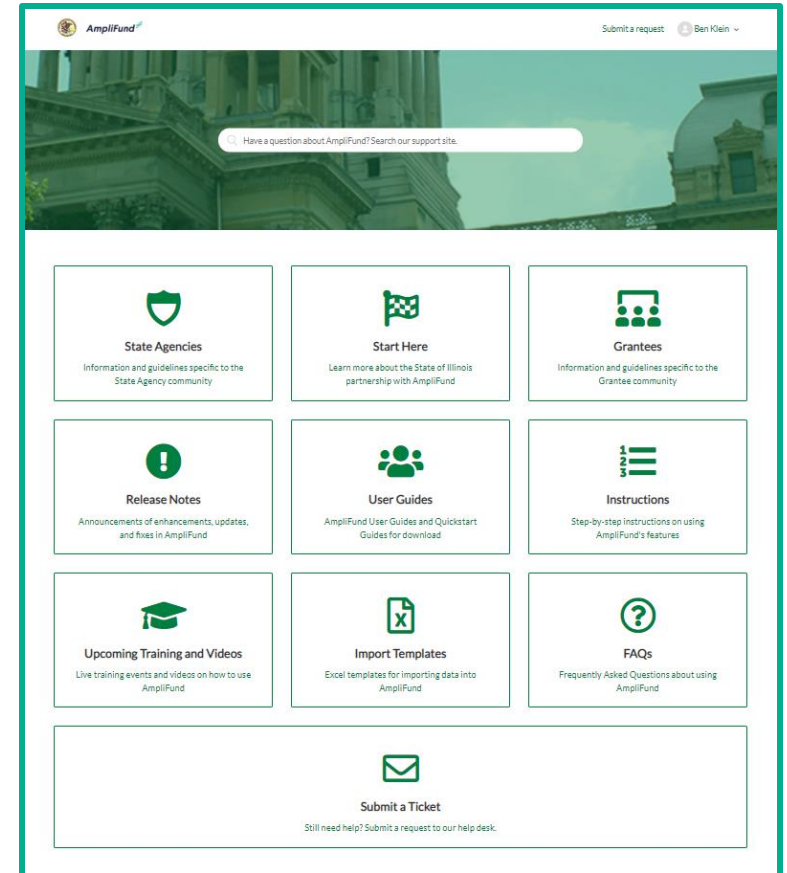
# AmpliFund Illinois Support Portal

## Submit a support ticket:

- Commercial – Support@amplifund.zendesk.com

- Illinois – Support@il-amplifund.zendesk.com

- Nebraska – Support@ne-amplifund.zendesk.com

## Supported Browsers:

- Google Chrome (current supported releases)

- Mozilla Firefox (current supported releases)

- Microsoft Edge (current supported releases)

- Apple Safari 10+

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# Question and Answer