**Script - Post Award Performance Plan Creation**

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| Script  |
| Welcome to the AmpliFund grant maker training series focused on post award performance plan creation process.    |
| After an award has been created in AmplIFund, there are a number of options as to how a performance plan can be created for the award.  The grant maker organization can copy over a submission performance plan from the performance plan template, can import the performance plan or can manually create a performance plan for the recipient.  The recipient can take all these same actions, if the award is configured so they have edit access to the performance plan.  Edit access for an award performance plan is a setting, you can reference our post award settings video for more detailed instructions on how to allow edit access for the recipient to a performance plan.  |
| First let’s review the submission performance plan copy process.  In order to use this process to create a performance plan, the award must have been created via workflow from an application submitted in AmpliFund’s applicant portal.  Also, the application performance plan template must have been used as part of the application process.  A few important considerations when copying a submission performance plan.  Recipients can complete this process if they have access to edit the award performance plan.   Grant makers can complete this action either before or after award activation, however recipients can only copy a submission performance plan after the award has been activated.  |
| Next let’s review the performance plan import process.  For an award performance plan to be imported into AmplIFund, the award record must be created and the recipient responsible staff must be available in the recipient account.  Some important considerations, the import can be completed by recipients if they have edit access to the performance plan, the import can occur before award activation if completed by the grant maker, but only after activation if completed by the recipient.    |
| Finally the last option for creating an award performance plan is to manually create the award performance plan in AmpliFund.  In order to manually create the performance plan, the award record must already be created and the recipient responsible staff must be available in the recipient account  Some important considerations, the manual creation of a performance plan can be completed by recipients if they have edit access to the performance plan, the creation can occur before award activation if completed by the grant maker, but only after activation if completed by the recipient.    |
| Let’s jump into AmpliFund and review where you would complete each of these tasks.  From the calendar navigate to Award Management then Awards.  |
| From the list of awards, click on the award icon for the relevant award.  |
| First we will review where to copy over the submission performance plan.  Navigate to the Pre-Award drop down, then Submission Performance Plan.  |
| Once in the submission performance plan in the upper right hand corner is a copy icon.  This icon will copy the pre-award submission performance plan to the post award performance plan.  To copy the performance plan click on the copy icon.  |
| A pop-up window will appear, to continue with copying the performance plan click copy.  |
| Next we’ll review where to import a post award performance plan.  Navigate to the relevant award then click on Post Award>Performance>Performance Plan  |
| In the upper right hand corner of the performance plan screen is an import icon.  Using this icon you can import the performance plan import template from your excel file.  The performance plan import template is available on AmpliFund’s support site.  |
| If you were to manually create the performance plan, you would start from this same screen.  By clicking the plus icon.  For detailed instructions on how to create a performance plan, you can reference our performance plan creation videos on the AmpliFund support site.  |
| Through this AmpliFund training video, you’ve learned the options for creating a post award performance plan.  Should you have additional questions, please reference our support site.  Thank you!  |