

## Performance Reporting Action Items

### Update Grant Details

- Navigation: Left Nav > Select Grant Management > Select Grants > Select [Grant Name] > Select Edit (pencil icon) from Options toolbar in the top right corner
- After selecting the edit icon, the page will refresh with available fields open for Grantee updates.
  - Required: Assign Recipient Grant Manager from list of available Grantee Staff
  - Optional: Update Recipient Award Name, Recipient Description, and Unique Identifier
  - SAVE
- Only needs to be completed once during the life of a grant, or upon staff changes.

### Mark Milestone Goal as Complete

- Navigation: Left Nav > Select Activity > Select Achievements > Select Create (plus icon) next to relevant performance report goal > Edit (pencil icon) from Options toolbar in the top right corner
- After selecting the plus icon, a Create Achievement pop-up will display.
  - Required: Check box for Complete
  - Optional: Add Notes
  - SAVE

### Close Reporting Period with Report attached

- Navigation: Left Nav > Select Activity > Select Reporting Periods > Select [Grant Name] > Select Create (plus icon) from Options toolbar in the top right corner
- After selecting the Create icon, a Reporting Periods popup will display. Select [Grant Name] from the drop down (as applicable), Achievements from reporting period type question, and time period, then save.
  - Required: Attach DNR quarterly reports through the Attach Documentation > Choose a file selection.
  - Optional: to validate that the milestone goal has been marked as complete, click on the goal name underneath Achievement Analytics.
  - CLOSE
- Once the close button has been selected, the reporting period will be sent to the funder. No further changes can be made to this reporting period.

### Mark Task Complete

- Navigation: Left Nav > Select Activity > Select Tasks
  - Find the correlating task to your grant and reporting period, select the Checkmark icon next to the Task Name. Mark task as complete.
- Marking Task as Complete stops related email reminders.

*Note: Multiple ways to navigate to sections of the product exist. Instructions are a direct path.*

**This job aide applies specifically to the following awards:**

- OSLAD 0299 (FY23)
- Special Wildlife Funds - Duck Stamp (FY22)
- Special Wildlife Funds - Duck Stamp (FY23)
- Special Wildlife Funds - Furbearer Fund - Education (FY24)
- Special Wildlife Funds - Furbearer Fund (FY23)
- Special Wildlife Funds - Furbearer Fund (FY24)
- Special Wildlife Funds - IL Habitat Fund (FY23)
- Special Wildlife Funds - IL Habitat Fund (FY24)
- Special Wildlife Funds - State Pheasant Fund (FY23)
- Special Wildlife Funds - State Pheasant Fund (FY24)
- Special Wildlife Funds - WPF Rehab Facilities (FY22)

**Additional Resource Material**

- Grantee Training and PowerPoint
  - <https://streamlinksoftware.wistia.com/medias/uz5kidnavh>
- AmpliFund Support Portal Videos and User Guide
  - Navigation: <https://il-amplifund.zendesk.com/hc/en-us/articles/4402988938643-New-User-Log-in-Navigation-for-Grantees>
  - Updating Grant Details: <https://il-amplifund.zendesk.com/hc/en-us/articles/4402904263443-Accessing-and-Updating-Grant-Award-Details>
  - Achievements: <https://il-amplifund.zendesk.com/hc/en-us/articles/4402904534419-Adding-Achievements-to-a-Performance-Plan>
  - Reporting Periods: <https://il-amplifund.zendesk.com/hc/en-us/articles/360022624094-How-To-Close-a-Reporting-Period>
  - Adding New Grantee Users: <https://il-amplifund.zendesk.com/hc/en-us/articles/4403022170131-How-to-Give-a-New-Grantee-User-Access-to-AmpliFund>
  - Grantee User Guide: <https://il-amplifund.zendesk.com/hc/en-us/articles/360022583833-Recipient-User-Guide>
- First time users of the AmpliFund Support Portal will need to create new credentials:
  1. Go to <https://il-amplifund.zendesk.com>
  2. Click the **Sign up** link
  3. Enter your **full name** and **email address**
  4. Complete the **I'm not a robot** check
  5. Click the **Sign up** button
  6. An email from [support@zendesk.com](mailto:support@zendesk.com) will be sent to you via email
  7. Click the link to set your password