Performance Reporting Guide

Applies to: MBCC subgrantees with grants in AmpliFund.

Contents

Performance Reporting process At-A-Glance
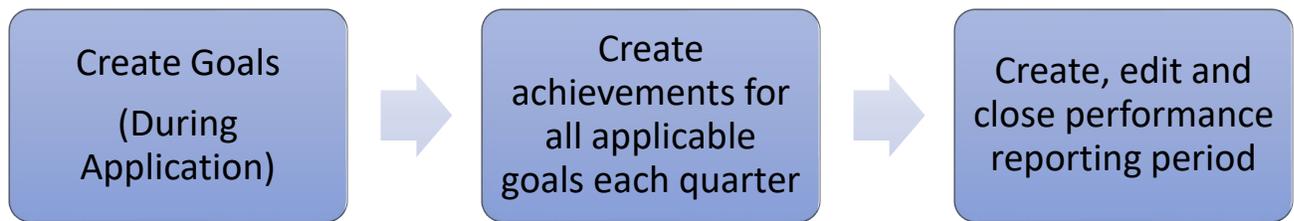
Create Goals (During Application) → Create achievements for all applicable goals each quarter → Create, edit and close performance reporting period

Report Due Dates

All MBCC grantees must submit online reports within fifteen days following the end of each reporting period.

Quarterly reporting periods are as follows:

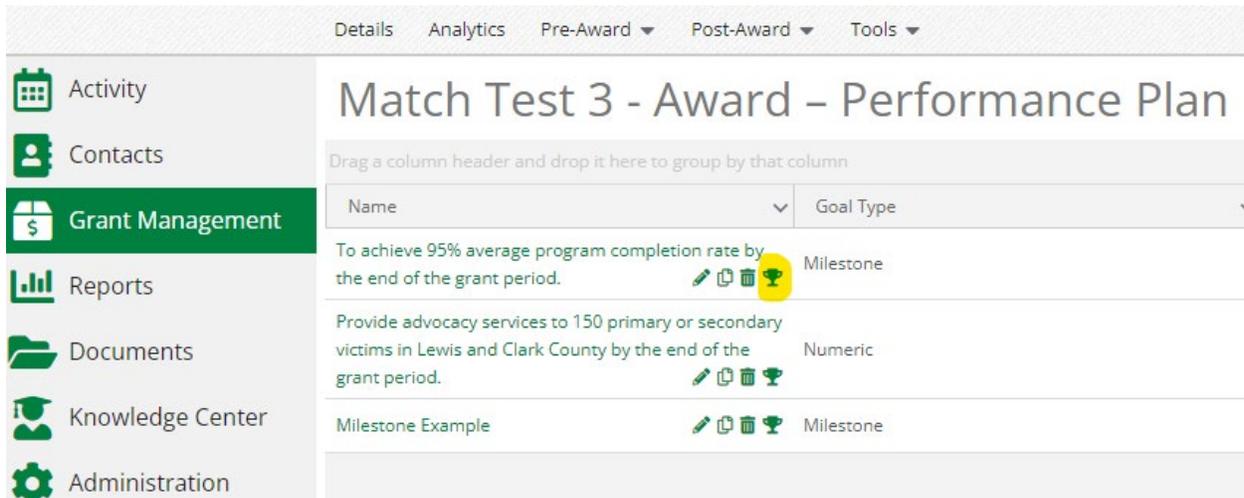| Reporting Period	Report Due Date
Quarter 1: July 1 – September 30	October 15
Quarter 2: October 1 – December 31	January 15
Quarter 3: January 1 – March 31	April 15
Quarter 4: April 1 – June 30	July 15

Step 1 Achievements

Achievements are a tool for reporting on the progress of your program goals. They must be created before submitting your quarterly report.

1. **Login to your account at mt.amplifund.com**
2. **Navigate to your grant by clicking on Grant Management > Grants > Your Grant**

3. **From the award Details page click on Post Award > Performance > Performance Plan**
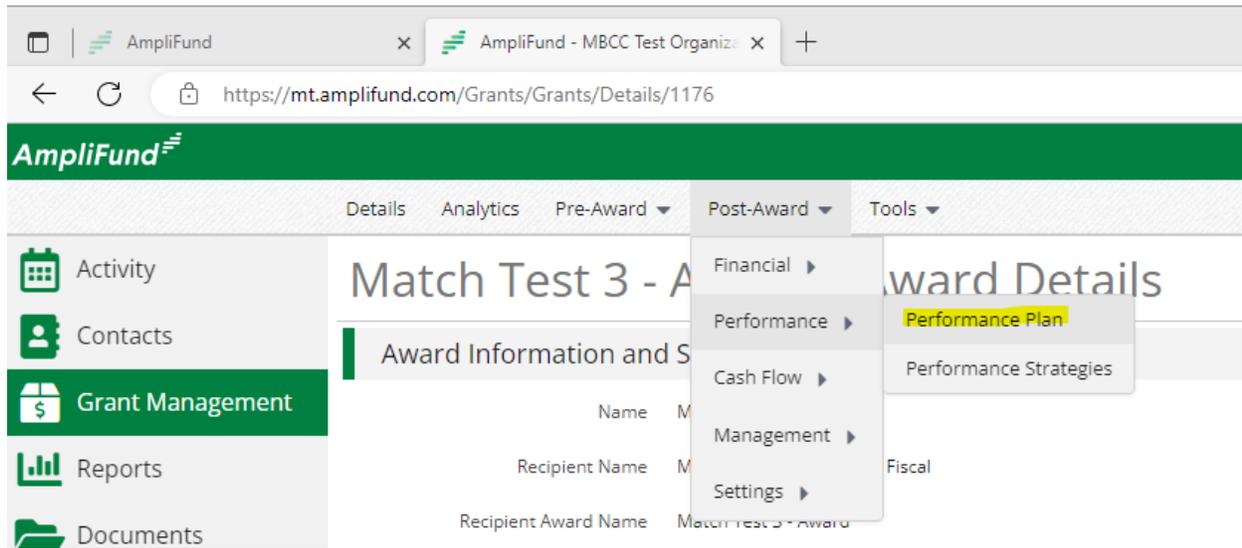
4. **The Performance Plan screen displays the goals created at the time of application. Click on the trophy icon next to the goal you would like to create an achievement for.**

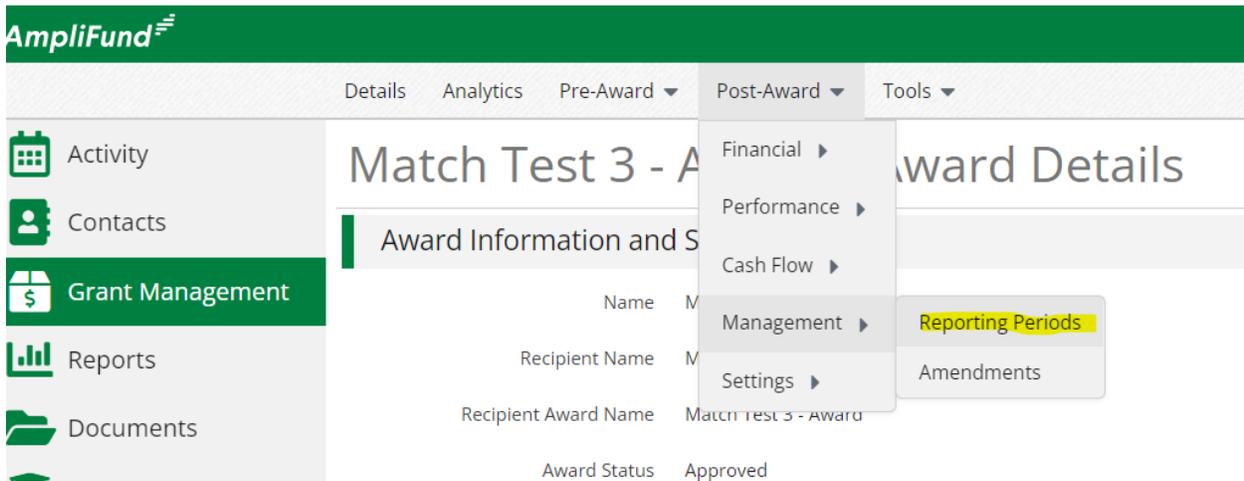5. **Click on the plus sign (+) in the top right corner to create a new achievement.**
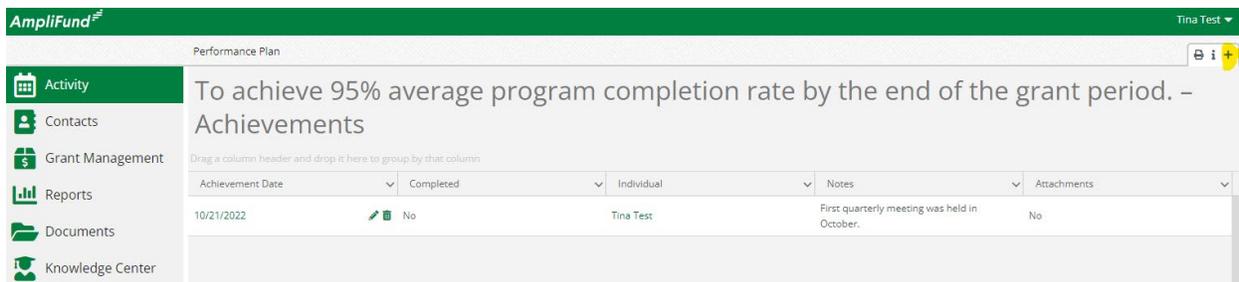
6. **In the pop-up window, select an achievement date and write a description of the activities performed. Be sure the achievement date is within the reporting period that it occurred otherwise it will not pull to the correct report. Achievements can be created at the time they occurred or at the end of the reporting period.**
7. **Click Create**
8. **Repeat this process for all applicable goals each quarter.**

Step 2 Reporting Period

After completing your achievements, create and close a reporting period to complete your quarterly performance reporting requirements.

1. **Navigate to the reporting period page by clicking on Post Award > Management > Reporting Periods**

2. **To create a new reporting period, click on the plus sign in the upper right corner. A pop-up window will appear.**
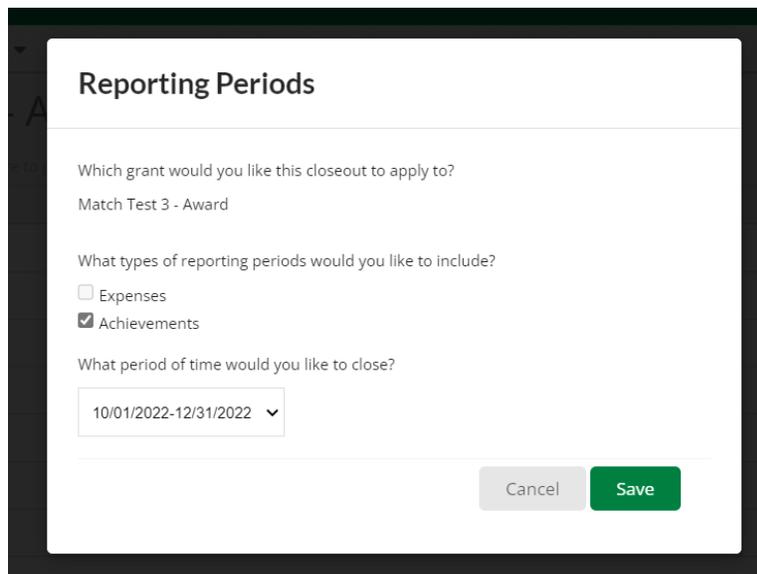
3.   **Select 'Achievements'.**
4.   **From the Dropdown, select the quarter you will be reporting on.**
5.   **Click Save.**
6.   **Confirm that 'Number of Goals with No Achievements' is 0.** *If one or more of your goals does not apply to the entire grant period, there may be instances where you do not report any achievements for that goal and period.*
7.   **On the reporting period screen, add any comments as necessary.**

8.   **Achievements Closeout: Select All to complete the submitted achievements.**

9. **Click save to save the report for later editing.**
10. **Click Close to finalize the report and submit to MBCC.**

Frequently Asked Questions

Can I edit my report after it has been closed?

To edit a closed report, the reporting period will need to be rejected by MBCC and returned to you for revisions. Contact MBCC if you need to make changes to a submitted report.

Am I required to have an achievement for every goal each quarter?

Goal progress should be reported on whenever there was activity on that goal. If one of your goals does not apply to the entire grant, you would not create achievements for every quarter. In this case, please include an explanation in the comments section of the reporting period.