CCCFF – Reporting: Performance Reporting Periods & Final Report Form

Browser: Log into AmpliFund, https://ne.amplifund.com using Google Chrome, Mozilla Firefox, or Microsoft Edge.

Summary

Progress reports are due on a semi-annual basis for the duration of the project and until closeout. **Every six months you will complete a 1) Performance Reporting Period and a 2) Budget Reporting Period to demonstrate project progress to DED.** When your project is complete, you will submit a final Payment Request, submit your last Performance and Budget Reporting Period, and complete a Final Report form.

The table provides an example based on a two-year contract term of March 12, 2021 through March 11, 2023.

6 Month Reporting	Time Periods	Due Date
Report 1	03/12/2021-08/31/2021	09/30/2021
Report 2	09/01/2021-02/28/2022	03/30/2022
Report 3	03/01/2022-08/31/2022	09/30/2022
Report 4	09/01/2022-02/28/2023	03/30/2023

NOTE: If your project is completed early, you will not need to complete the remaining Reporting Periods.

Performance Reporting Periods

The Performance Report asks you to report on the status of the project and an overview of the work to be performed in the next six months. **Progress is reported via two Performance Plan Goals titled "Project Status Summary" and "Planned Project Progress" (if your award lists additional achievements starting with the word "Archive", you do not need to complete those achievements for this Performance Reporting Period).**
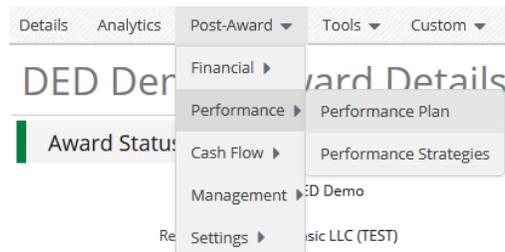
Process Overview
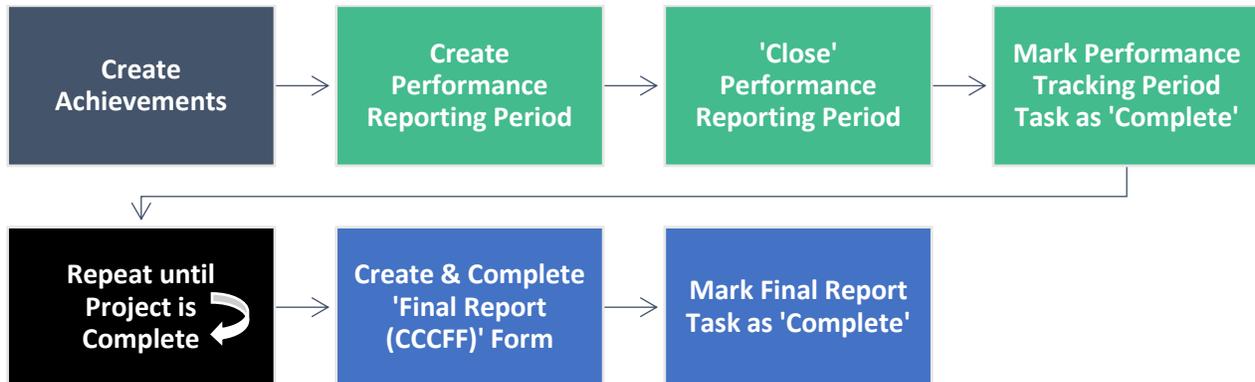
1. Create Achievements

First, you will add achievements to each Performance Plan Goal (described above). Achievements are how the progress of each goal is tracked.

Step 1: Go to the **Award Screen > Post-Award (tab) > Performance > Performance Plan**.

NEBRASKA
Good Life. Great Opportunity.
DEPT. OF ECONOMIC DEVELOPMENT

AmpliFund

Step 2 (Optional): Click the green goal name (e.g., "Project Status Summary") to view more detail about the Goal.

Step 3: To create an achievement, click the Achievement (trophy) icon next to the goal name.

🏆

Step 4: Click the + icon (top right) to add an **Achievement**.

🖨 i ⊕

Step 5: Complete the **Create Achievement** screen (additional instructions below) and click **Create**.

Achievement Date: [Make sure the achievement date is within the Performance Reporting Period. For example, September reporting covers work completed from the previous March – August. **Therefore, the achievement date <u>must</u> be between March 1 and August 31.**]

Answer: [Enter response based on the Question.]

Complete: [Do not check this box unless this is your last reporting period prior to requesting final payment.]

Notes: [Leave this field blank, enter all text in the Answer field.]

Upload File(s): [Do not attach additional documentation.]

Create Achievement

Grant	DED Demo
Goal Type	Narrative
Goal	Example: Narrative
Description	More information on the Narrative goal or what was entered on the application.
Responsible Individual	John Doe
Achievement Date	3/11/2021 📅
Question	How and what you should respond in the Answer field.
Answer*	
Complete	☐
Notes	
Upload File(s)	📄 Choose file(s)

Create   Cancel

08/30/2021   Additional Resources - https://opportunity.nebraska.gov/amplifund/#FAQ

NEBRASKA
Good Life. Great Opportunity.
DEPT. OF ECONOMIC DEVELOPMENT

AmpliFund

Editing Achievements: After creation, if you need to edit your Achievement, click the **Pencil icon** next to the Achievement Date, edit the Achievement and click **Save**.

Deleting Achievements: If you need to delete your achievement, click the Trash icon next to the Achievement Date.

Step 6: After creating an achievement, click **Performance Plan** at the top of your screen to view all goals again.


Step 7: Repeat Steps 1-6 until all Performance Plan Goals have an Achievement for the current Performance Reporting Period. **Reminder**: **if your award lists additional achievements starting with the word "Archive", you do not need to complete those achievements for this Performance Reporting Period.**

2. Creating Reporting Periods

After all **Achievements** have been created, you must create a Performance Reporting Period. To create a Reporting Period:

Step 1: Go to the **Award Screen > Post-Award (tab) > Management > Reporting Periods**.
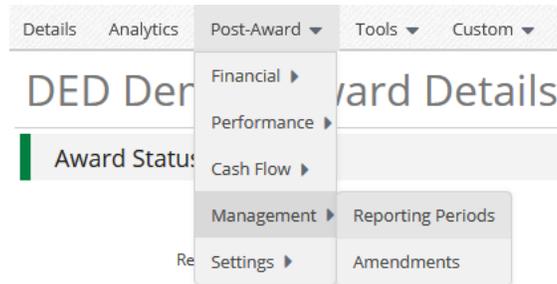
Step 2: Click the **+ icon** (top right) to create Reporting Period.

Step 3: On the Reporting Periods screen, select **Achievements**. The **Time Period** for the report is the last six months that the current performance report covers (e.g., September reporting covers work completed from the previous March – August. Therefore, the time period is between **March 1 and August 31** of that year.). Click **Save**.

NEBRASKA
Good Life. Great Opportunity.
DEPT. OF ECONOMIC DEVELOPMENT

AmpliFund

Reporting Periods

Which grant would you like this closeout to apply to?

DED Demo

What types of reporting periods would you like to include?

☐ Expenses
☑ Achievements

What period of time would you like to close?

[Select a time period... ▾]

[Cancel] [Save]

Step 4: You have successfully assigned the Achievements created above to the Reporting Period. Review the Reporting Period screen to ensure all information is correct.

1. OVERALL ACHIEVEMENT DETAILS

Number of Goals with No Achievements: This will show how many goals do not have an Achievement within this Reporting Period Date Range. This should be 0. If it is not 0, you will need to go back to the goal, and edit/add an achievement to the missing goal.

> NOTE: If your award listed additional achievements starting with the word "Archive", you were not required to complete those achievements for this Performance Reporting Period. Those goals will appear here. E.g., if you had two goals marked as "Archive", the Number of Goals with No Achievements will be 2. This is permissible.

Comments: [Optional.]

Attach Documentation: [Do not attach additional documentation here.]

Overall Achievements Details

Number of Goals with No Achievements   1 ← Missing an Achievement on one of the goals within the Performance Reporting Period time range.

Comments

This needs to be 0 before you close the Performance Reporting Period.

Attach Documentation

Attach Documentation

[📄 Choose a file] 🗑

NEBRASKA
Good Life. Great Opportunity.
DEPT. OF ECONOMIC DEVELOPMENT

AmpliFund

2. **ACHIEVEMENT ANALYTICS**

The **Achievements Analytics** section show how many achievements are associated for each goal during your Reporting Period. If there is a 0, that means no achievement was entered during this Reporting Period (date range) for that Goal.

Achievements Analytics	List the Goals on Performance Plan.	
Goal	**Type**	**# of Achievements Period to Date**
Project Status Summary	Narrative	1
Planned Project Progress	Narrative	0

Here is the Goal that has the missing Achievement. Go back to this Goal to edit/add the Achievement.

3. **ACHIEVEMENT CLOSEOUT**

In the **Achievement Closeout** section, leave the 'Select All' selected. This is 'closing' out your achievements associating them to this Reporting Period. The achievements can no longer be edited after being 'closed'.

Achievements Closeout
Select All ☑

Step 5 (Optional – Only if You Need to Edit the Reporting Period Prior to Submission): If you need to **edit** this Reporting Period, click **Save** in the bottom right, go back to your Achievements and add/edit them, then come back to Reporting Periods (Award Screen > Post-Award (tab) > Management > Reporting Periods). After selecting this open Reporting Period it will automatically update as long as your edits were Achievements within this Reporting Period date range.

Step 6: If you are ready to submit to DED, click **Close** (Submit). If you are not ready to submit, click **Save**.

Cancel   Close   Save

Viewing All Reporting Periods: To see all Reporting Periods, go to: **Award Screen > Post-Award > Management > Reporting Periods.** If you had a 'Saved' Reporting Period, this is where you would go to come back, click on it, and 'Close' it.
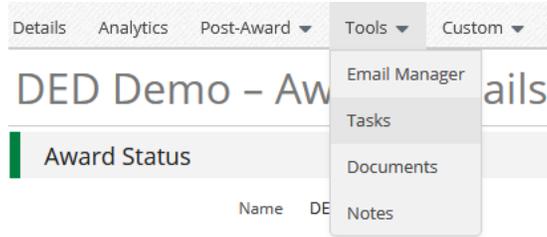
Editing Achievements after Closing a Reporting Period: The Achievements in a 'Closed' Reporting Period cannot be edited.

NOTE: *If your entire project is completed early, you will not need to complete the remaining Reporting Periods.*

3. Marking Tasks Complete

After completing your reporting period now you must mark your Task as complete.

Step 1: Go to the **Award Screen > Tools (tab) > Tasks**.

Step 2: There are 3 ways to mark a Task as complete:

1. Select the specific Task and use the **Mark as Complete** checkmark icon under **Actions**.

2. Click the **Checkmark icon** on the Task row.

3. Click into the Task Name to see the description, and click the **Mark as Complete** checkmark icon in the top right corner.

After marking the Task as complete, the **Task Status** will be "Completed".

08/30/2021   Additional Resources - https://opportunity.nebraska.gov/amplifund/#FAQ

NEBRASKA
Good Life. Great Opportunity.
DEPT. OF ECONOMIC DEVELOPMENT

AmpliFund

Final Report Form

Once the project is complete (or the project has met the 1:1 matching requirements), you must complete a Performance Reporting Period, a Budget Reporting Period, and the "Final Report (CCCFF)" form and submit the final payment request. See above and the CCCFF – Expenses & 2nd Half Reimbursement User Guide for information on completing the Performance Reporting Period, Budget Reporting Period, and the final payment request. This section provides an overview for how to complete the Final Report (CCCFF) form.
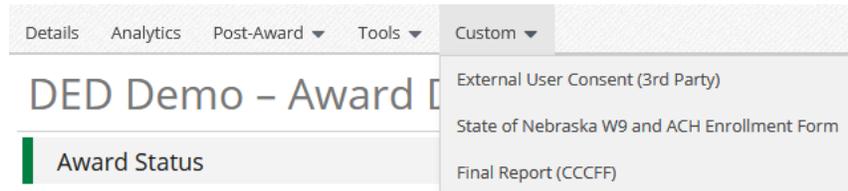
NOTE: When completing the final Performance Reporting Period, you must mark the Achievement as "complete" as described above.

Process Overview

1. **Submitting the Final Report (CCCFF)**

   Step 1:Login to AmpliFund > Grant Management (left navigation) > Grants > [Choose Your Grant] > Custom (tab) > Select Final Report (CCCFF).

   Step 2: Click the **+ icon** in the top right.

   Step 3: Complete the form. For the Project Completion Documentation sections, you only need to complete the portion related to your project (e.g., if you had a Construction Project, please complete the Construction section; if you had a Planning Project, please complete the Planning section).

   Documentation Requirements for Construction Projects: Attach documentation identifying that the project is complete (e.g., certificate of occupancy, certificate of substantial completion) and project photographs. In addition, upload a letter from the Chief Elected Official or Meeting Minutes certifying the project is complete as designed and contracted in accordance with the CCCFF contract. Where the project is incomplete, letter or minutes should include narrative that clearly indicates estimated project completion date and project status.

08/30/2021   Additional Resources - https://opportunity.nebraska.gov/amplifund/#FAQ

NEBRASKA
Good Life. Great Opportunity.
DEPT. OF ECONOMIC DEVELOPMENT

AmpliFund

Documentation Requirements for Planning Projects: Attach a copy of the final planning document. Additionally, upload a letter from the Chief Elected Official or Meeting Minutes certifying the project is complete as designed and contracted in accordance with the CCCFF contract.

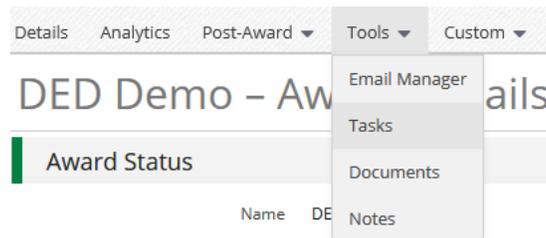Step 4: When you are done, click **Create** in the bottom right.

Create   Cancel

Step 5 (Optional): After creation if you need to edit the form, click the **Pencil icon** in the row of the form.

2. Marking Tasks Complete

After completing your Final Report now you must mark the Task as complete.

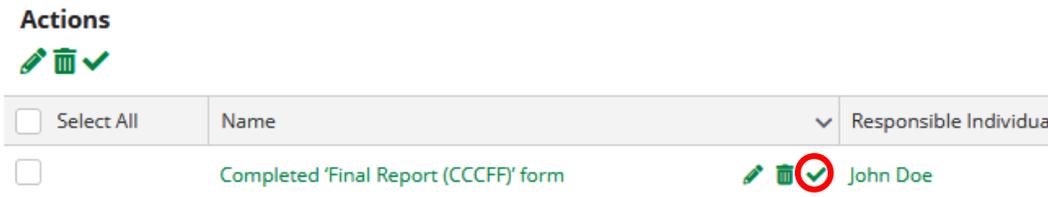Step 1: Go to the **Award Screen > Tools (tab) > Tasks**.

Details   Analytics   Post-Award ▾   Tools ▾   Custom ▾

Email Manager

DED Demo – Aw   ails   Tasks

Award Status   Documents

Name   DE   Notes

Step 2: There are 3 ways to mark a Task as complete:

1. Select the specific Task and use the **Mark as Complete** checkmark icon under **Actions**.

Actions
✏️ 🗑️ ✔️

☐ Select All	Name		Responsible Individual
✔️	Completed 'Final Report (CCCFF)' form	✏️ 🗑️ ✔️	John Doe

2. Click the **Checkmark icon** on the Task row.

Actions
✏️ 🗑️ ✔️

☐ Select All	Name		Responsible Individual
☐	Completed 'Final Report (CCCFF)' form	✏️ 🗑️ ✔️	John Doe

3. Click into the Task Name to see the description, and click the **Mark as Complete** checkmark icon in the top right corner.

🖨️ ℹ️ ☑️ ✏️ 📋 🗑️

After marking the Task as complete, the **Task Status** will be "Completed".