

VCVA & DV Quarterly Reporting

Technical Assistance Webinar

Agenda

- ▶ Financial Quarterly Report
- ▶ Performance/Achievement Quarterly Report
- ▶ Creating and Submitting a Reporting Period
- ▶ Creating and Submitting a Payment Request
- ▶ Support Resources
- ▶ Q & A

Quarterly Report Process

Due Dates:

1st Quarter Report due October 15th

July 1st - September 30th

2nd Quarter Report due January 15th

October 1st - December 31st

3rd Quarter Report due April 15th

January 1st - March 31st

4th Quarter Report due July 15th

April 1st - June 30th

Quarterly Reports must include the following:

- ▶ Expense Report
- ▶ Documentation to Support Expenses
- ▶ Performance/Achievement Report
- ▶ Payment Request

Quarterly Reporting Actions

- ❑ Log-in to AmpliFund
- ❑ Post-Award > Financial > Expenses > Create Expense (+Icon)
 - 1) Enter Expense Details
 - 2) Attach Grant-Funded Personnel Timesheets
 - 3) Attach Invoices for Approved Expense Line Items
 - 4) Close Budget Reporting Period

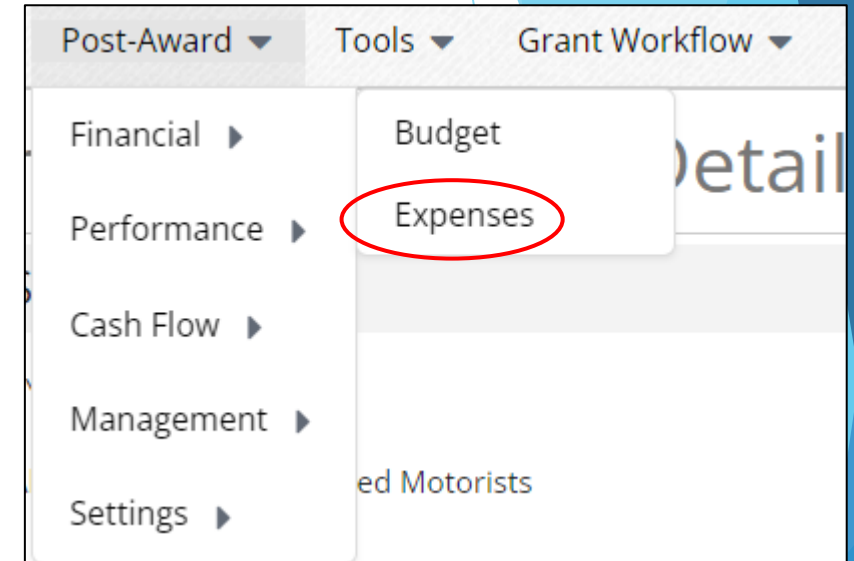
Quarterly Reporting Actions Continued

- ❑ Post-Award > Performance > Performance Plan > Trophy Icon > Enter Achievement (+Icon)
 - 1) Enter Achievement Number for All Services Provided within Quarter
- ❑ Post-Award Management: Close Performance Reporting Period
- ❑ Submit Payment Request

Financial Quarterly Report

▶ Accessing your Expenses

1. Go to **Grant Management > Grants**
2. Click your VCVA/DV Grant
3. Click on **Post Award > Financial > Expenses**



Financial Quarterly Report

Creating Expenses for the Quarter

- ▶ Click Run
- ▶ This will show each expense that has been entered to date
- ▶ Click the +Icon



Financial Quarter Report

- ▶ Create the New Expense:
- ▶ Enter in the Following:
 1. Category
 2. Line Item
 3. Direct Cost
 4. Expense Date
 5. Mark Expense Status as “Reviewed”
 6. Attach Documentation
 7. Click “Create”

Add Expense

Grant FY24 VCVA Grant Fund

Category Personnel

Line Item Select a Budget Item...

[Clear all filters](#)

Item Type Non-Personnel Line Item

Direct Cost * \$100.00

Exclude From Match

Responsible Individual

Created By ahalteman@atg.state.il.us


Expense Date * 3/31/2024

Expense Status Reviewed

Payment Status New

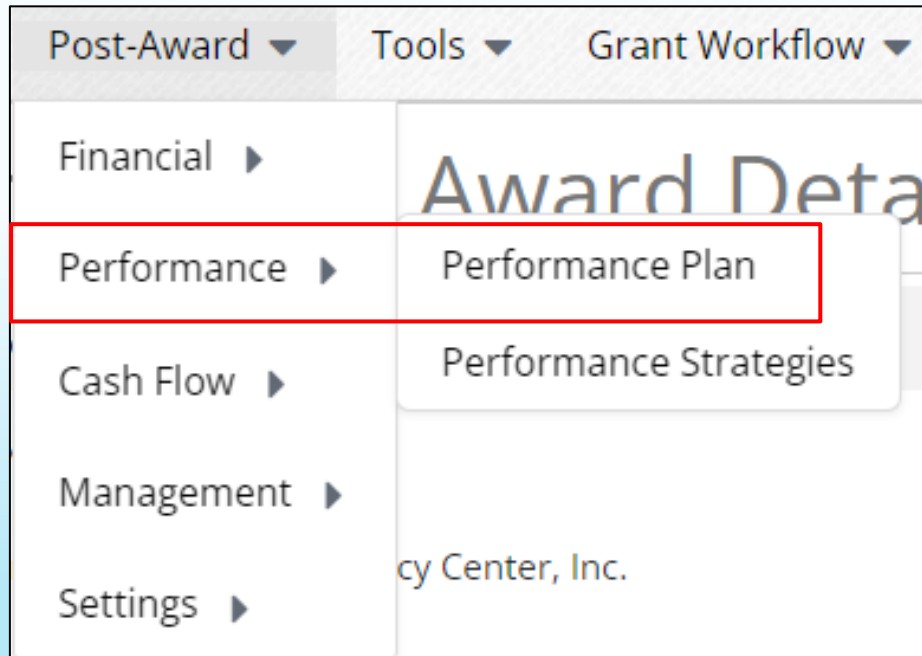
Payee

[Create](#)



Performance/Achievement Report

- Post-Award > Performance > Performance Plan > Trophy Icon > +Icon



A screenshot of a table with a red arrow pointing to the trophy icon in the first row. The table has columns for 'Name' and 'Goal Type'. The rows list various goals and their types.

Name ▲	Goal Type
24 hour Crisis Line	Numeric
Assistance with Crime Victim Compensation Forms	Numeric
Assistance with VINE Registration	Numeric
Case Management	Numeric
Child Abuse	Numeric

Performance/Achievement Report

- ▶ Enter number achieved for each performance goal
- ▶ Once you click the Trophy Icon for the goal, you will click the +icon located on the top right-hand corner



Please note:

- ▶ Achievement date must be within the relevant quarter
 - ▶ 1st Quarter: July 1st -September 30th
 - ▶ 2nd Quarter: October 1st -December 31st
 - ▶ 3rd Quarter: January 1st - March 31st
 - ▶ 4th Quarter: April 1st - June 30th

Performance/Achievement Report

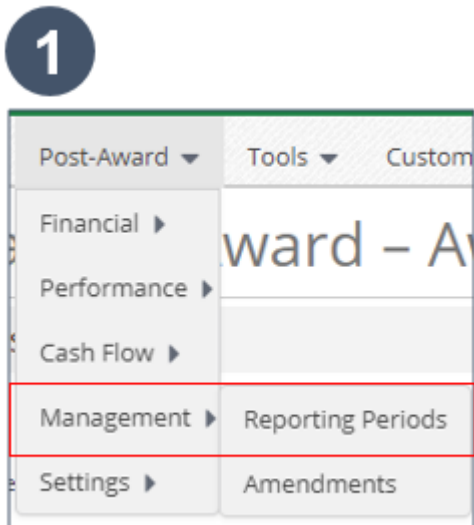
- Enter in the Achievement Date and Number Achieved
- Repeat Steps for each Goal Achieved within the Reporting Period

Create Achievement

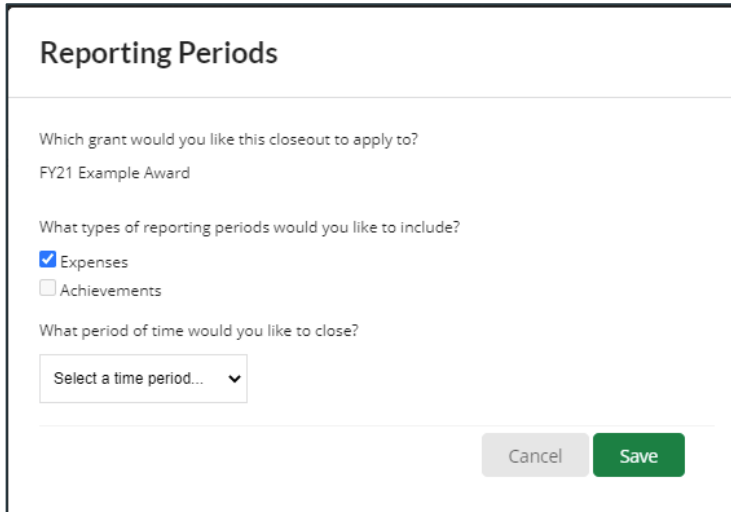
Grant	FY24 VCVA Grant Fund
Goal Type	Numeric
Goal	24 hour Crisis Line
Description	Please enter a numeric goal for the FY24 grant year
Responsible Individual	Andrea Halteman
Achievement Date	<input type="text" value="3/31/2024"/>
Number to be Achieved	5
Number Achieved	<input type="text" value="0"/>

Closing Out Reporting Period

1. Post-Award>Management>Reporting Periods
2. Click + icon located in the upper right-hand corner
3. Select Achievements, Expenses and Reporting Time Period
4. Review Report
5. Close Report

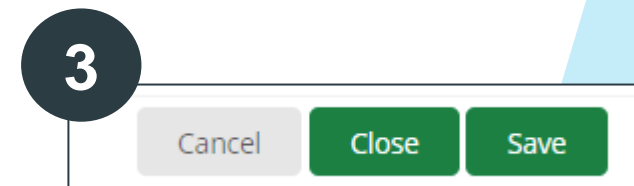


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The image shows a dialog box titled 'Reporting Periods'. It contains the following text and controls:

- Which grant would you like this closeout to apply to?
FY21 Example Award
- 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... (dropdown menu)
- Buttons: Cancel, Save



Important Information

Reporting Period MUST be Closed
prior to submitting a Payment
Request

Creating a Payment Request

- ▶ Post Award > Cash Flow > Payment Request
 1. Click the +icon located on the top right
 2. Enter Name (1st, 2nd, 3rd, or 4th Quarter) and Date Created
 3. Choose the Related Reporting Period
 4. Type in Total Requested Amount - Should Match Expenses for Quarter
 5. Click Submit

Payment Request Information			
Payment Request Name	2nd Quarter		
Date Created	12/31/2023		
Related Reporting Period(s)	Period ending 12/31/2023		
Expenses From	10/1/2023	To	12/31/2023
Payment Type	Reimbursement		

Support Resources

Sharon Dehn

Director, VCVA

Sharon.dehn@ilag.gov

Andrea Halteman

Assistant Director, VCVA

Andrea.Halteman@ilag.gov

Support Resources

Submit a support ticket

- ▶ support@amplifund.zendesk.com

Visit the support portal

- ▶ <https://amplifund.zendesk.com>

Supported Browsers

- ▶ Google Chrome (current supported releases)
- ▶ Mozilla Firefox (current supported releases)
- ▶ Microsoft Edge (current supported releases)
- ▶ Apple Safari 10+