**Core Concept: Enrolling and Scoring in Workflow**

|  |
| --- |
| Script  |
| Welcome to the AmpliFund Core Concept video focused on enrolling applications in workflow and scoring.  |
| Once an applicant has completed and submitted their application from the AmplIFund applicant portal.  Your next step will be to enroll the application into the Opportunity Application Review workflow, after you enroll the application into the workflow, the application can move through the different stages of the workflow through scoring and either to awarding or alerting the applicant they were not awarded.  |
| Let’s do a brief overview of all the steps to enroll an application into a workflow and later we’ll dive into this in AmpliFund.  First you can go to the submitted applications in AmpliFund, you’ll click on the application name, then navigate to Workflow, Add to Workflow.  A pop-up box will appear to confirm you want to enroll the application and then once enrolled, users assigned to the workflow actions will be able to access those steps.  |
| Next, let’s take a brief look at the scoring process.  This happens in the “Score Application” action of the workflow.  We’ll go through this overview and then dive into AmpliFund together.  The workflow will direct you to an application review screen.  Reviewers can click into any applicable application forms and then can add numeric scores and comments.  Reviewers can save their scores for later or if they are done they can Submit scores.  It is important to note that once scores are submitted they cannot be altered in anyway or by any user, they are final.  Be sure to coach reviewers to only click on submit with their scoring if they are completely finished with the scoring process.  |
| If you chose to include the budget template or performance plan template in your application, those will also be available for scoring.  In these templates, reviewers would include comments then click submit.  |
| Now, let’s review these steps in AmpliFund.  From the calendar, click on Award Management>Fund Opportunities.  |
| Select your applicable opportunity from the list.  |
| Once on your opportunity, click on applications at the top.  Applications will take you to a list of all submitted applications.  If you want to view any unsubmitted applications, you can click on opportunity review.  Applications must be submitted to be enrolled in a workflow.  |
| From the applications list, click on the Application name.  |
| Then click Workflow, Add to Workflow and select Opportunity Application Review.  |
| Congratulations!  You’ve enrolled your first application into a workflow!  Before your application goes live, you’ll want to move a test application through the workflow to get comfortable with each step.  Now together, let’s look at how scoring would look on an application that is in the Scoring queue.  You might remember from a previous Core Concept video that when you send to scoring queue, you will get this message to confirm  |
| Then, you’d select, Available Actions> Score Application  |
| You will then land on this page to score the application.  You can click into any applicable forms to score questions.  |
| Once on the application form, you can select scores for each question that has been designated as a scoring question.  |
| As you enter your scores, the bottom total will continue to change.  You can also add final comments to the form.  |
| If you want to save your scores and return to them later, you can click on save.  If you submit your scores they are final and cannot be altered by any user.  |
| Next, if applicable you can click on the Comment box next to the budget template or performance plan template if those were included in your application.  |
| At the bottom of both templates there is a spot for final comments, then you can submit your comments.  |
| While on the application, you have access to a scorecard.  If you click on scorecard at the top you’ll see the application scorecard.  |
| The scorecard will display the scores once they have been submitted.  Any comments you’ve saved will appear on the comments section.    |
| Through this Core Concept video, you’ve learned how to enroll applications into workflow and how to score within a workflow.  Should you have additional questions, please reference our support site.  Thank you!  |