**Script:** **AmpliFund Training: Multi Round Scoring- Scoring Process**

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| Script |
| Welcome to the AmpliFund Training video focused on the scoring process for multi round scoring. Multi round scoring is an advanced feature in AmpliFund available to customers who have an Advanced or Enterprise subscription with custom workflow configuration capability. This video is recommended for users who are already well versed in AmpliFund’s workflow capabilities and have set-up opportunity application workflows. If you are not familiar with workflow you may reference other videos and user guides on our support site or materials provided to you during training. |
| To leverage AmpliFund’s multi round scoring capability, there are a number of steps to set up and configure. In this video we will review how to score an application with multi round scoring. Please note that for the relevant opportunity, you must complete the multi round scoring settings in the application settings, have scored questions on your application form and have a workflow set up that includes 1 queue with a scoring action for each scoring round. |
| Let’s go into AmpliFund and walk through the process of scoring an application with multi round scoring. After logging into AmpliFund, from the calendar click on Award Management then either Fund Opportunities or Grant Opportunities to access the relevant opportunity where you intend to score applications. |
| From the list of opportunities click on the name for the relevant opportunity. |
| Once in the opportunity, assign the workflow you’ve built for multi round scoring by going to Configuration then Workflow Settings |
| Select your workflow from the list and click Add. If you have not yet added reviewers to the scoring action, you can add them by clicking into the queue and assigning reviewers at each scoring action. As a reminder user assignments added to actions in the Administration section will appear in all opportunities where that workflow is utilized. |
| After a workflow is assigned click on Applications at the top to access submitted applications. |
| Click on the application name that you want to begin scoring. |
| Once in the application, click on Workflow, Add to Workflow and then select the workflow you’ve identified for multi round scoring. |
| When the pop up box appears click on confirm to add the application to the workflow. |
| Next click on Workflow, Available Actions. In this example we’ll click on scoring round 1 as that is our first queue, which is also a scoring queue. Move your application through your own workflow following the queue order you’ve designated for your business process. |
| After clicking on scoring round 1, we’ll be directed to the score application section. Multi round scoring functions the same as a single round of scoring in this part of the process. Reviewers will click into each application form and score all relevant questions and make any necessary comments. |
| In each application form reviewers will enter their scores. Reviewers can save their scores to access them later or submit scores. If in the application settings you enabled the ability to edit scores after submission, any round 1 reviewer would be able to edit their scores after clicking submit, until this application is moved to the next round. When the application is moved to the next scoring round, only org admins, the opportunity manager and fund admins can edit scores. |
| As each user submits their scores any scored forms will update to be identified that they’ve been scored on the Score application page. |
| On the scorecard tab, reviewers will be able to see scoring progress with their own scores and comments and if in the application settings you configured the ability for reviewers to see other scores, they will see all submitted scores and comments. |
| If you’ve configured the ability for reviewers to edit their scores in the application settings. Reviewers can then click on the pencil icon next to their comments to edit their scores and resubmit |
| After all reviewers for your first scoring round have submitted their scores, the application can be moved to the next scoring round or next step in your workflow process by going to Workflow, Available actions and then selecting the option that moves the application to the next queue. In this case we will select Move to Consensus round. |
| Reviewers should then each go through the process of scoring for the next round as assigned. As each reviewer updates their scores, the scorecard will continue to populate with scores and comments. The scoring round drop down at the top can be used to toggle between any scoring rounds to see scores. |
| The scores for the rounds and overall will be based on the settings you identified in the application settings. In our example we chose to calculate both the round and total score as an average, so in this example the score is being calculated based on the average score by all the reviewers. |
| You can also leverage the opportunity review tab to review scoring progress and scores per application. |
| Through this AmpliFund Training video, you’ve learned how to score applications with multi round scoring. Should you have additional questions, please reference our support site. Thank you! |