External User – Request to Add to Recipient Portal

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

Who is an External User?

An **External User** is someone who needs access to your Recipient Portal that is not in your Organization (3rd Party) to be able to access one or more awards. The most common instance is a consultant who is managing the post award process for a municipality.

Steps to Request an External User to your Account

Step 1: Notify your program rep that you will need a third party to manage your grant.

Email your program rep that you will need to add an External User to your Recipient Portal. If you need to add more than one external user, provide the exact number of external users to your program rep.

Finding Your Program Representative

If you do not know who our program representative is, in AmpliFund navigate to: Grant Management (left navigation) > Grants > [Choose Your Grant].
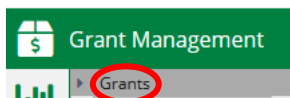
You will now be in the details tab of your Award. In the **Award Information** section, you will see your DED **Responsible Person** and **Grant Manager** for your award.

Step 2: DED will assign you a 'task' to complete this form.

NOTE: *If your award has assigned a Recipient Grant Manager to the award, the Task will default to that User. If there has not been a Recipient Grant Manager assigned for the award, make sure you are a User in the Recipient Portal so you can be assigned. See "How to Add Users in the Recipient Portal" for instructions.*

Notification

The User that is assigned the Task will receive an email notification to let them know they have been assigned.

Click the link to view the entire description of the Task.

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AmpliFund Tasks

Login To AmpliFund > Activity (left navigation) > Tasks
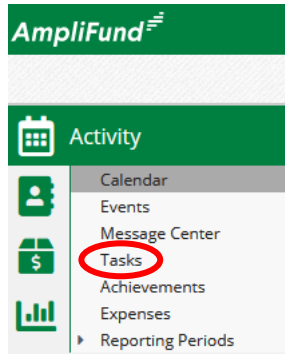
Here is a list of your Tasks. Click on the Name link, "Complete 'External User Consent (3rd Party)' Form – [Award Name]" to view the description.
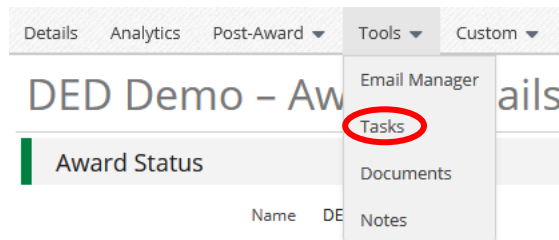

See Tasks Only on a Specific Award

To only see Tasks on an Award navigate to: Grant Management (left navigation) > Grants > [Choose Your Grant] > Tools (tab) > Tasks

Step 3: Fill out the 'External User Consent (3rd Party)' form and change the task status to "Completed".

Completing the Form on the Award

Grant Management (left navigation) > Grants > [Choose Your Grant] > Custom (tab) > External User Consent (3rd Party)
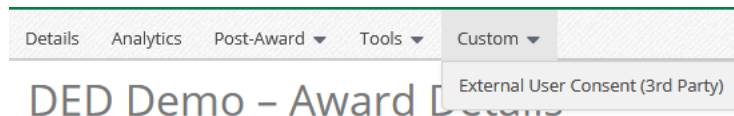
To create a form, click the **+** in the top right corner.

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NOTE: *You will need to create a separate form for each External User that you are requesting to add to your account.*

Complete the **Recipient**, **External User – To Be Added**, and **Electronic Signature** sections.

Recipient Section

NOTE: This section refers to the organization that received the grant, NOT the external user who will manage the grant on behalf of the recipient.

- **Contract Number:** The contract number assigned to you by DED.
  - e.g. 20DTR000 or 20-00-000
- **Recipient Organization Name:** Name of the organization that *received* the award, not the third party managing the award
  - *NOTE*: Use the full organization name with the abbreviation in parentheses, if applicable
    - e.g. Nebraska Department of Economic Development (DED)
- **Award Name:** The name of your award
  - *NOTE:* This can be found on the Award Details page in AmpliFund.
    - Grant Management (left navigation) > Grants > [Choose Your Grant].

Recipient

Contract Number (Award Identification Number)*

Recipient Organization Name*

Award Name*

External User-To be Added Section

NOTE: This section refers to the external organization and user who will manage the grant on behalf of the recipient, NOT the organization that received the grant.

- **External User Organization Name:** Full name of the external organization who will manage the grant on behalf of the recipient, NOT the organization that received the grant
  - *NOTE*: Use the full organization name with the abbreviation in parentheses, if applicable
    - e.g. Nebraska Department of Economic Development (DED)
- **First & Last Name & Email Address:** First and last name and email of the user who works at the external organization and will be managing the award on behalf of the recipient

External User - To Be Added

External User Organization Name*

First Name*

Last Name*

Email Address*

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When you are done, click **Create** at the bottom of your screen.

Create   Cancel

After creation, you will see your list of External Users forms. If you need to edit a form, click the edit pencil next to the form.

DED Demo – External User Consent (3rd Party)

Drag a column header and drop it here to group by that column

Contract Number (Award Id...	Award Name	External User Organization ...	First Name	Last Name	Email Address	Date Form is Completed by...	Has the External User Cons...
123456	DED DEMO	Test Consulting Firm	Jerry	Gergich	jerry.gergich@test.com	12/31/2020	Yes

After you have completed any edits, click the **Save** button in the bottom right corner.

Save   Cancel

If you need to add a form for another user, click the **+** in the top right corner.

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Marking Task as Complete
NOTE: *DED will NOT process this form(s) until the task status is completed. Do not mark the task as complete until all of your 'External User Consent (3rd Party)' forms are complete, if you are requesting more than 1 user at a time.*

Navigate back to your Task screen. Activity (left navigation) > Tasks

There are 3 ways to mark a Task as complete:

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

John Doe – Tasks

Actions
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☐ Select All	Object Type	⌄	Object Name	⌄	Name ↑	⌄	Responsible Individual
✓	Grant		DED Demo		Complete 'External User Consent (3rd Party)' Form – DED Demo 🖊 🗑 ✓		John Doe

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

John Doe – Tasks

Actions
🖊 🗑 ✓

☐ Select All	Object Type	⌄	Object Name	⌄	Name ↑	⌄	Responsible Individual
☐	Grant		DED Demo		Complete 'External User Consent (3rd Party)' Form – DED Demo 🖊 🗑 ✓		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.

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

Step 4: After being notified from DED that the user has been added, you can now assign the External User as the 'Recipient Grant Manager' to your award in your Recipient Portal.

Notification

You will receive an email when the External User has been added to your Recipient Account.

Assign as Recipient Grant Manager

Navigate to the Award: Grant Management (left navigation) > Grants > [Choose Your Grant] > Click the Edit Pencil icon (top right)

Scroll down to the **Award Information** section, in the dropdown select the User.

Click the **Save** icon in the bottom right corner.

Security Roles

Verify the External User has the security role of **Department User (No Salary)**. This ensures that they will only see award information to which they are assigned.

Additional Resources: For more information on what security roles your External User should have, please view 'Security Roles' and 'Security Roles Matrix' user guides here, http://opportunity.nebraska.gov/amplifund/#FAQ-Award-Management.

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