

# User Account Management Guide

## Introduction

During data migration, Criminal Justice Grants (CJG) imported the Subgrantee Chief Financial Officer as the primary account owner in AmpliFund. This role was selected as it historically did not have as much turnover, and was a consistent SIMON role across all recipients.

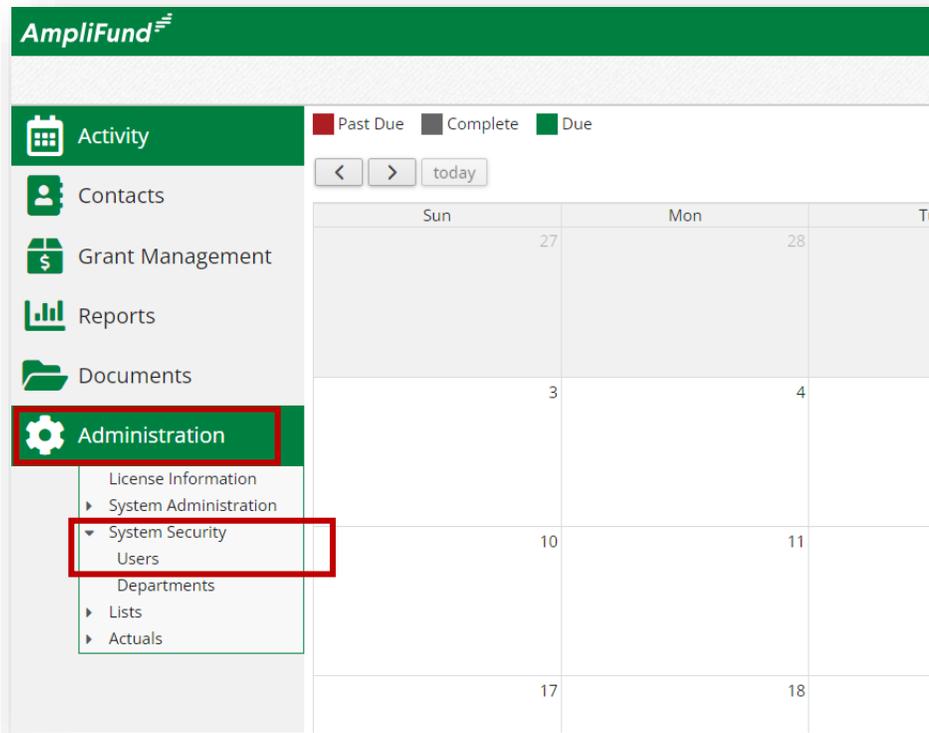
When CJG activates an award, the notification will go to the account owner email registered in AmpliFund. The email will contain a link to log in and set up your awards and profile in the AmpliFund system. If you have questions or concerns about the account owner for your organization, please send an email to [FDLEocigFAQ@fdle.state.fl.us](mailto:FDLEocigFAQ@fdle.state.fl.us).

CJG is no longer reviewing and approving user accounts in our electronic grant management system. The AmpliFund system allows for each recipient organization to manage their own users via the “Administration” menu.

## Adding Users to your AmpliFund Account

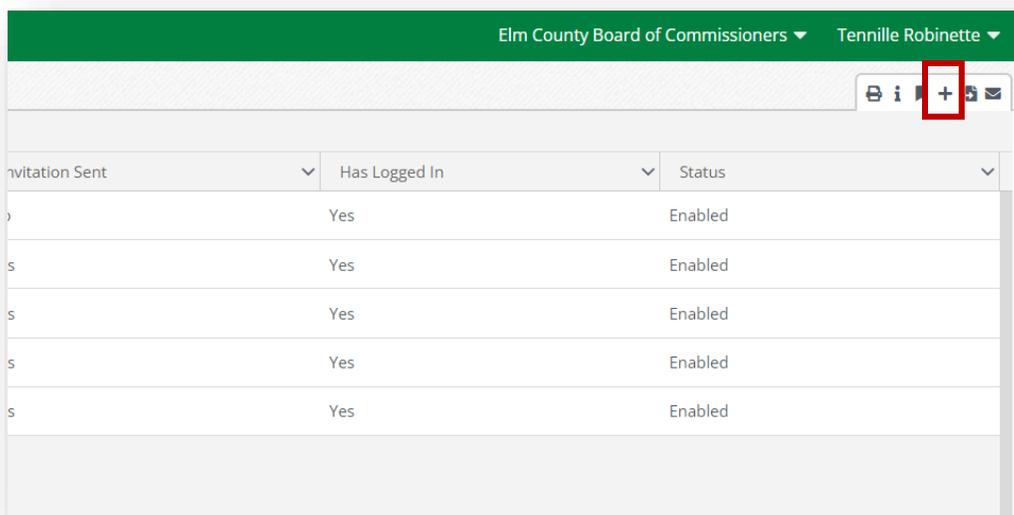
Adding new users to your AmpliFund account is a two-step process. First, you must create their account in the system. Then, you must send them the system-generated email to invite them into the system.

1. Log into the AmpliFund system ([www.gotomygrants.com](http://www.gotomygrants.com)) using your email address and password you set up through the activation email.
2. Access the “Users” menu by clicking “Administration → System Security → Users” on the left menu bar.



## User Account Management Guide

- To add a new user, click the “+” icon on the top, right action menu.



- If the new user will be responsible for completing or viewing pending applications, check the box to give them “Applicant Portal Access” and select their role. It is recommended to leave the role as “Organizational Admin”; however, information regarding the role types can be found on our [website](#).

At a minimum, you must enter the following fields:

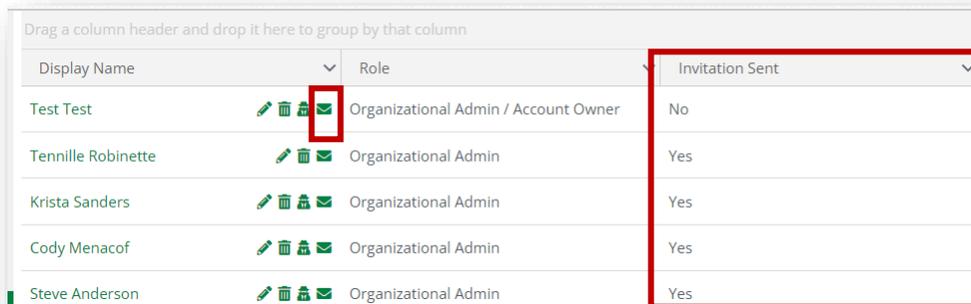
- Role
- First Name
- Last Name
- Email Address

However, since CJG will use the contact information from AmpliFund, it is recommended to ensure all user profiles have title and phone number filled out as well. Once you have entered all the information click “Create”.

The screenshot shows the "Create User" form. The form is divided into sections: "User Information", "Staff Information", and "Primary Address". In the "User Information" section, there are checkboxes for "Subscribe to Daily Emails" and "Subscribe to Weekly Emails", both of which are checked. Below these is the "Applicant Portal Access" checkbox, which is checked and highlighted with a red box. Below the checkbox is a dropdown menu for "Role", which is set to "Organizational Admin" and also highlighted with a red box. In the "Staff Information" section, there are input fields for "First Name" and "Last Name", both of which are highlighted with red boxes. Below these are fields for "Title", "Supervisor" (a dropdown menu), and "Track Time" (a dropdown menu). In the "Primary Address" section, there are input fields for "Address Line 1" and "Address Line 2". At the bottom right of the form, there is a green "Create" button, which is highlighted with a red box.

## User Account Management Guide

- Once you have created the user, you must send the system email to “invite” them into the system by clicking the green envelope icon next to their name, and clicking “Send Invitation” on the popup message. The user screen will display if you have sent the invitation to the user and if they have logged into the system.



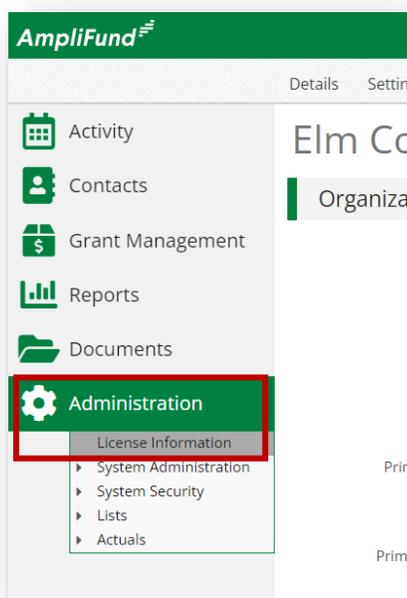
Display Name	Role	Invitation Sent
Test Test	Organizational Admin / Account Owner	No
Tennille Robinette	Organizational Admin	Yes
Krista Sanders	Organizational Admin	Yes
Cody Menacof	Organizational Admin	Yes
Steve Anderson	Organizational Admin	Yes

Users will have 72 hours to use the link in the email to log in and create their account. If they do not log in and finish their account creation in that time frame, they will need to be resent the system invitation.

### Updating the Account Owner

On occasion it may be necessary to update the account owner for the organization’s profile in the AmpliFund system. This can be done by any user with an Organizational Admin role.

- Log into the AmpliFund system ([www.gotomygrants.com](http://www.gotomygrants.com)).
- Access the License information by clicking “Administration → License Information” on the left menu bar.

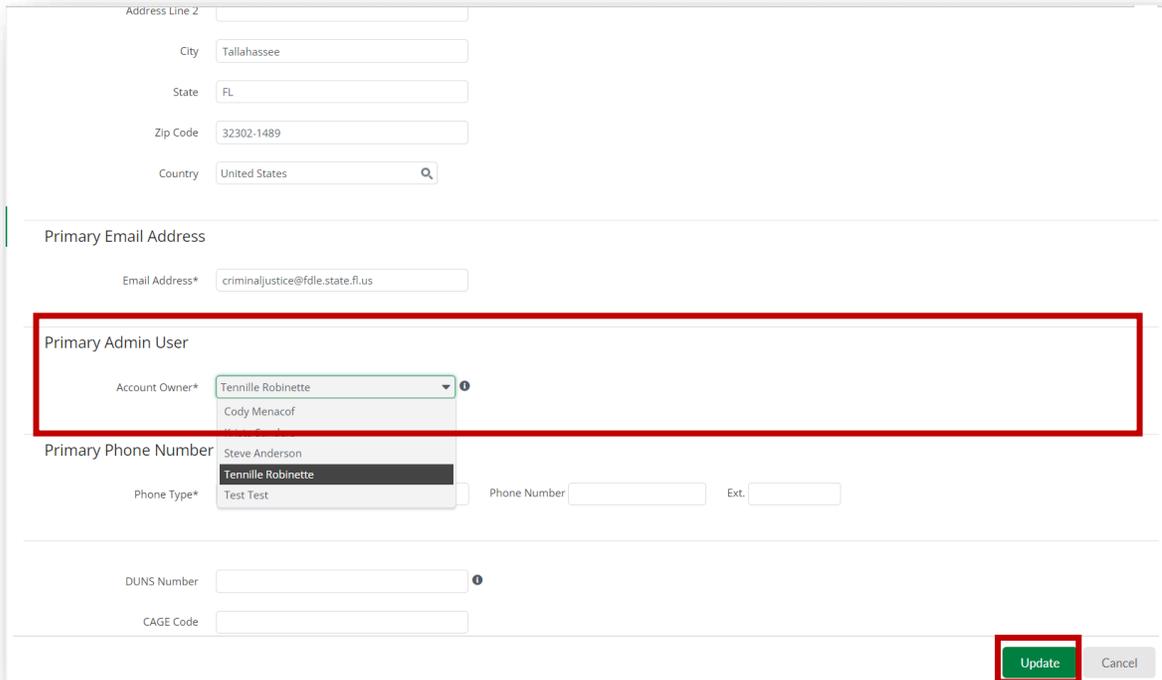


## User Account Management Guide

3. To change the account owner, or update other fields, click the edit pencil icon on the top, right action menu.



4. Scroll down to the "Primary Admin User" section and select the appropriate user from the "Account Owner" dropdown. Then click "Update" when done.

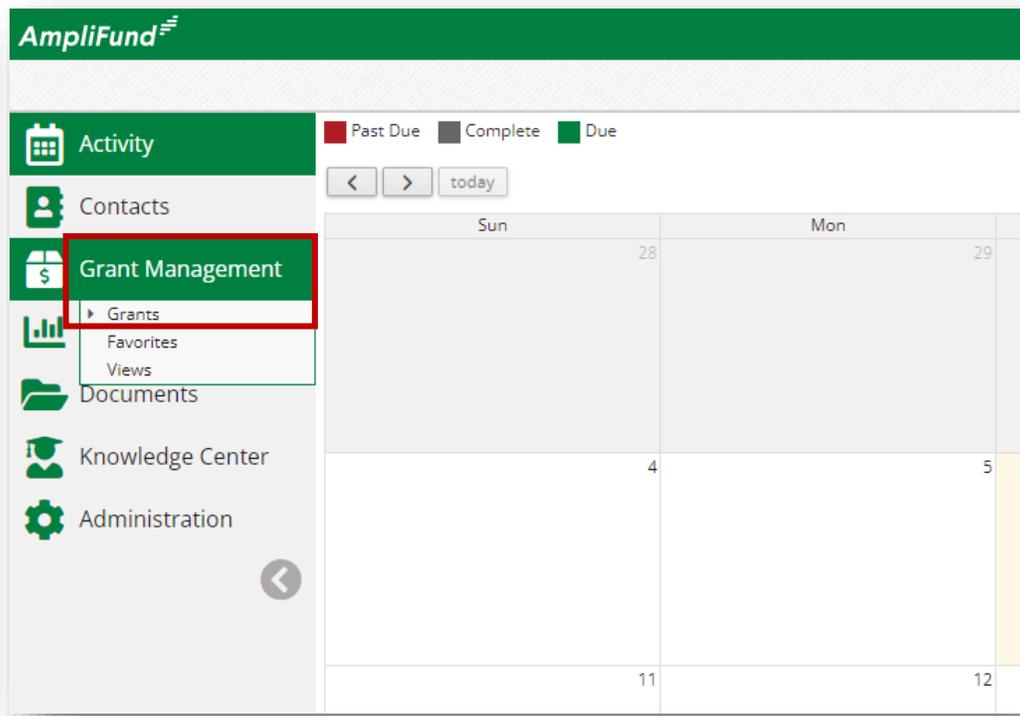
A screenshot of a user account management form. The form contains several sections: "Address Line 2", "City" (Tallahassee), "State" (FL), "Zip Code" (32302-1489), "Country" (United States), "Primary Email Address" (Email Address\*: criminaljustice@fdle.state.fl.us), "Primary Admin User" (Account Owner\*: Tennille Robinette), "Primary Phone Number" (Phone Type\*: Steve Anderson, Tennille Robinette; Phone Number, Ext.), "DUNS Number", and "CAGE Code". The "Primary Admin User" section is highlighted with a red rectangle. At the bottom right, there is a green "Update" button and a gray "Cancel" button. The "Update" button is also highlighted with a red rectangle.

## User Account Management Guide

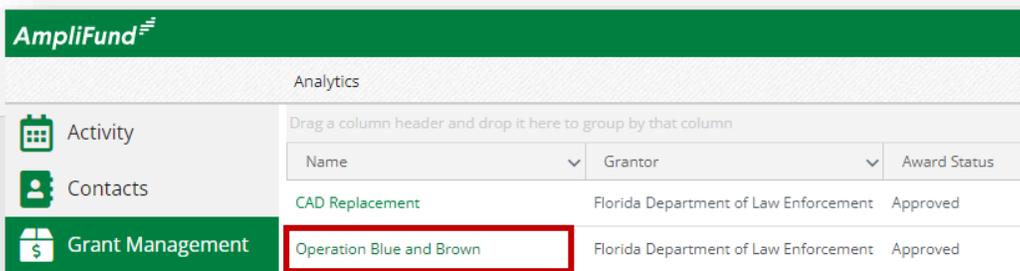
### Adding a Recipient Grant Manager to Each Award

The role of the recipient grant manager is to serve as the primary point-of-contact for your organization. Selecting this role, will allow the recipient grant manager to receive notifications from AmpliFund when there is a problem with their programmatic or financial reporting. For new awards in AmpliFund, the organization will be responsible for adding a recipient grant manager to their new award, as well as updating the role when there is a change in staff.

1. Log into the AmpliFund system ([www.gotomygrants.com](http://www.gotomygrants.com)).
2. Access the award which you are assigning a recipient grant manager by clicking “Grant Management → Grants” on the left menu bar.

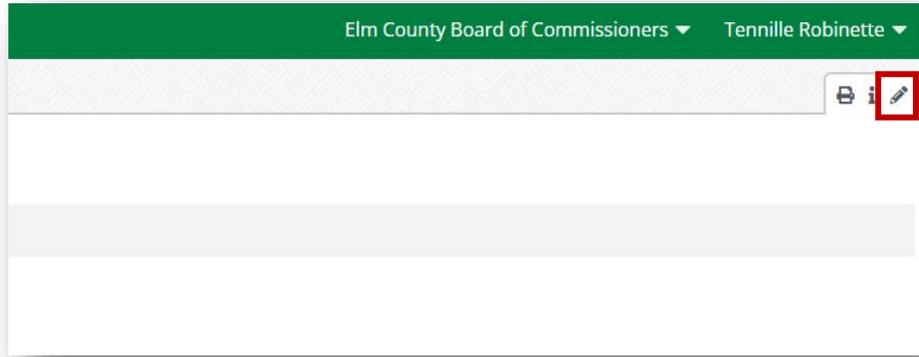


3. Select each award name you are needing to add a recipient grant manager to.

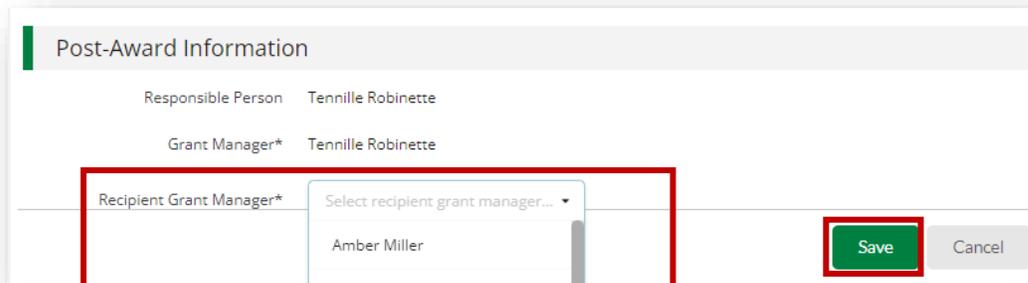


## User Account Management Guide

4. To add or update the recipient grant manager, click the edit pencil icon on the top, right action menu.



5. Scroll down to the "Post-Award Information" and select the appropriate user from the "Recipient Grant Manager" dropdown. Then click "Save" when done.

A screenshot of a form titled "Post-Award Information". The form has a light gray header with the title. Below the header, there are two rows of text: "Responsible Person" followed by "Tennille Robinette", and "Grant Manager\*" followed by "Tennille Robinette". Below these, there is a row for "Recipient Grant Manager\*" followed by a dropdown menu. The dropdown menu is open, showing a list of names, with "Amber Miller" selected. The dropdown menu and the "Save" button are highlighted with red squares. The "Save" button is green and the "Cancel" button is gray.

NOTE: If you have multiple awards which need a recipient grant manager added or updated, you will need to repeat steps 3 – 5 in this section for each award.