

External Assessor users for accounts created before 29 August 2018

Edit User



Access Type

- System Wide** a user with a single level of access of all programs.
- Program Specific** a user with different levels of access for each program.
- External Assessor** an external reviewer who can access only some applications for assessment.
- No Access** someone not currently permitted to log in to your organisation's SmartyGrants account.

Note that changing the access type will reset the user's access levels to default. Any existing access levels defined below will be deleted.

[Update Access Type](#)

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Access Levels



- No Access** The assessor cannot view the stage or any applications assigned to it.
- Access Applications** The assessor can access any application assigned to the stage. When viewing an application the assessor can access the application and assessment tabs.
- Access Applications and Acquittals** The assessor can access any application assigned to the stage. When viewing an application the assessor can access the application, assessment and acquittal tab.

Program: Demo EOI Application Program

Stage	Stage Date	Applications	No Access	Access Applications	Access Applications & Acquittals
EOIs Received	31 December 2016	7	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Successful EOIs	5 October 2016	2	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Program: Demo Program

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LIMITATION

External Assessor was an ACCESS TYPE

This meant that if a person had internal access to one program in your account, and **External Assessor** access to another program in your account, they needed to be set up as 2 users in your account, with different email addresses.

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Program: Demo Program

LIMITATION

An External Assessor was given access to applications in a particular Program & Stage

This complicated or limited assessment setup for some programs in SmartyGrants, for example:

- where different assessment forms are completed by different Assessors at the same time; or
- where a number of expert Assessors are each assigned 1 or 2 applications.

Edit User

ACCESS TYPES



Access Type

Access Type

NEW

External Assessor is no longer an ACCESS TYPE...

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... Assessor is now an ACCESS LEVEL instead



Streamlined Grants Management

streamlinedgrantsmanagement.com.au



**System Wide
ACCESS TYPE >
ACCESS LEVELS**

Access Levels

For more information on access levels see the [Guide to System Wide Access Levels](#).

	Assessor Application Only	Assessor Application & Acquittal	View Only	Standard User	Program Manager	Administrator	Financial Delegation
All Grant Programs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	\$ 5000



**Program Specific*
ACCESS TYPE >
ACCESS LEVELS**

Access Levels

Grant special access ⓘ Contacts Mailouts

For more information on access levels see the [Guide to Program Specific Access Levels](#).

Grant Program	No Access	Assessor Application Only	Assessor Application & Acquittal	View Only	Standard User	Program Manager	Financial Delegation
Demo Program	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	\$ 4000
Sample: Grants Program - GrantMaker Trial	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	\$

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**System Wide
ACCESS TYPE >
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Access Levels

For more information on access levels see the [Guide to System Wide Access Levels](#).

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Demo Program	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	\$ 4000
Sample: Grants Program - GrantMaker Trial	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	\$

What will happen to my *External Assessor* users when I enable the feature? How will *Assessor* users get access to applications?

3. Assessor access will work differently (see full details below). Any external assessors who had access to a stage, will now be set to a program specific user (for the program that the stage access sat in). Assessors will now only see tasks that are assigned to them as a user. Therefore, if you want your assessors to immediately have tasks/applications to view, you will need to physically assign tasks to them under the new task tab [\(Extracted from the SmartyGrants HELP HUB\)](#)

*OPPORTUNITY TO STREAMLINE

Program Specific* ACCESS TYPE > ACCESS LEVELS



As **Assessor** is now an ACCESS LEVEL and this can be defined for each program, one user can now have internal access to one program in your account, and (external) **Assessor** access to another program in your account.

John Smith

Send login instructions



Access to SmartyGrants

John Smith has **program specific** access to your organisation's SmartyGrants. See the list below for the access level for each program.

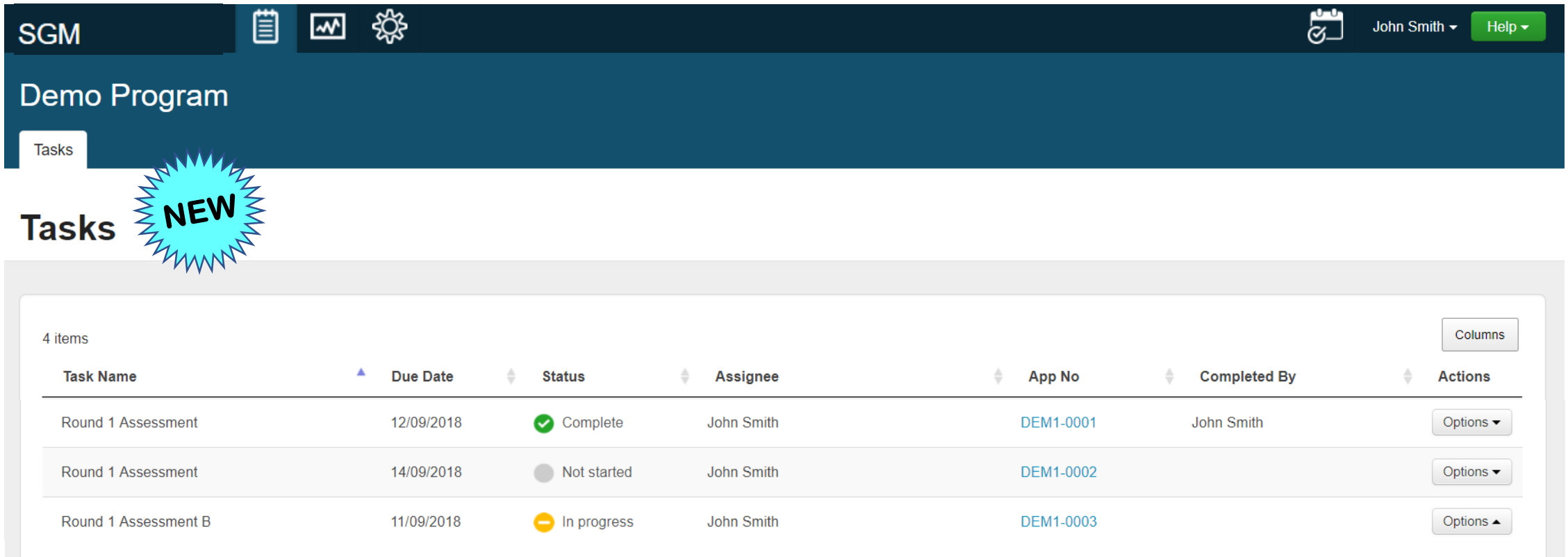
Regardless of the permissions below, this user does **not** have access to the contacts, funding or payment sections of SmartyGrants.

Grant Program	No Access	Assessor Application Only	Assessor Application & Acquittal	View Only	Standard	Program Manager	Financial Delegation
Demo Program	—	✓	—	—	—	—	-
Sample Program	—	—	—	—	—	✓	No limit

OPPORTUNITY TO STREAMLINE examples

Assessor access to Applications is now based on the user having a Task assigned to them. Examples of how previous limitations can be overcome are:

- Different (external) **Assessors** can do assessments using different assessment forms at the same time, and their access can be restricted to the Assessment Form each needs to fill out.
- Individual applications can readily be assigned to different **Assessors**.



SGM

Demo Program

Tasks

NEW

4 items

Task Name	Due Date	Status	Assignee	App No	Completed By	Actions
Round 1 Assessment	12/09/2018	Complete	John Smith	DEM1-0001	John Smith	Options
Round 1 Assessment	14/09/2018	Not started	John Smith	DEM1-0002		Options
Round 1 Assessment B	11/09/2018	In progress	John Smith	DEM1-0003		Options