

# Upskill Maine – Documentation

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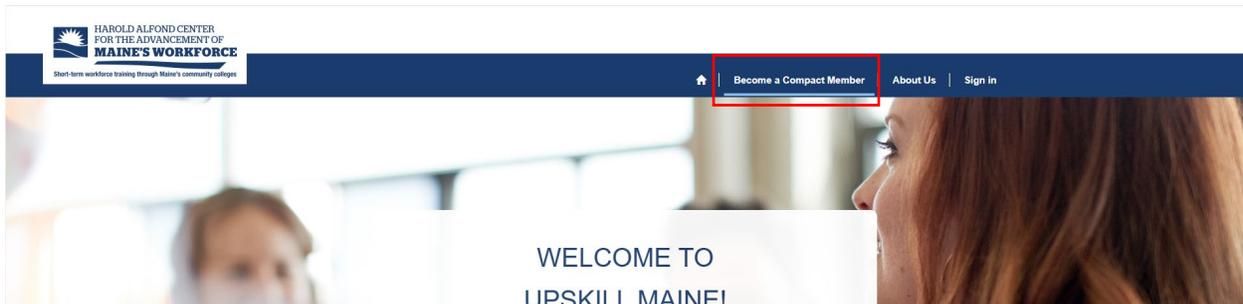
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## I. Create a Compact Membership Application in Upskill Maine Portal

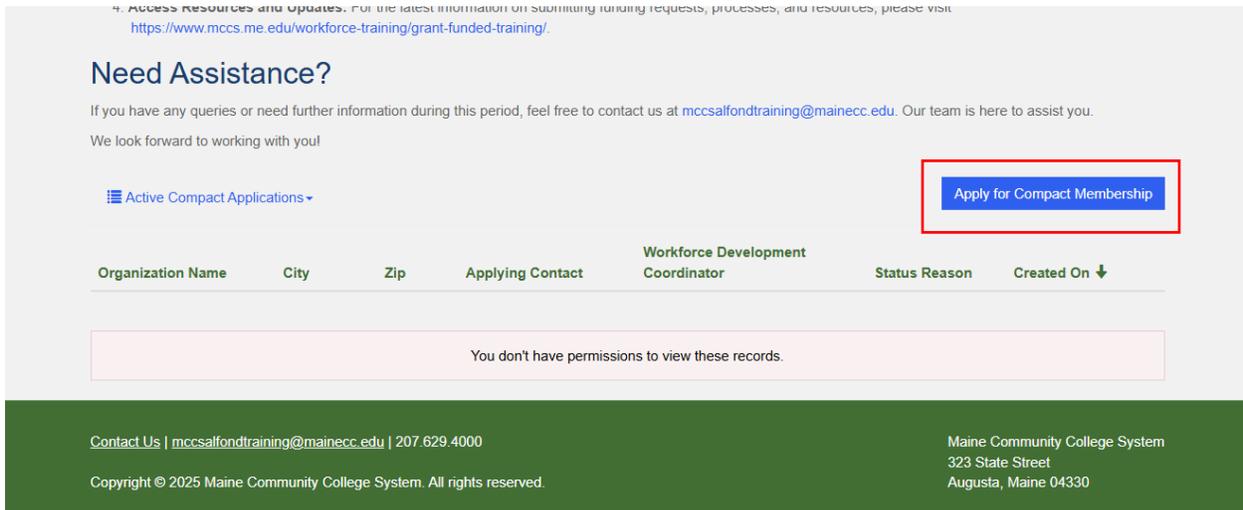
### Beginning an application

Navigate to the portal: <https://upskillmaine.powerappsportals.com/>

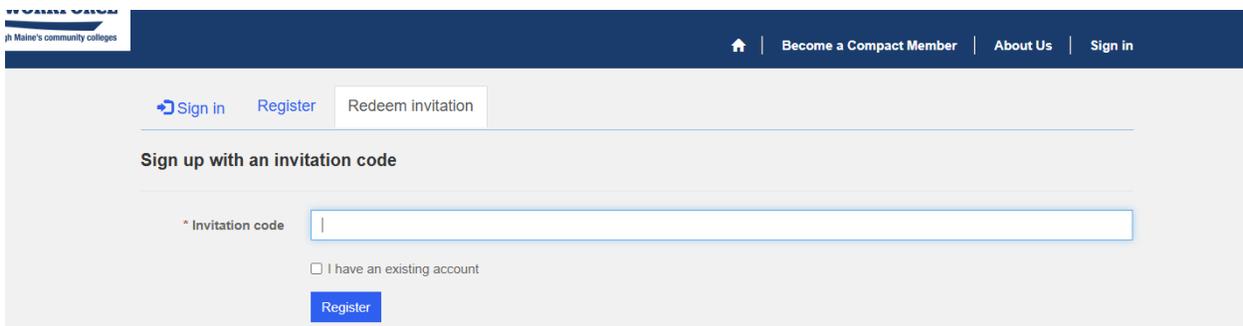
Click on **'Become a Compact Member'** in the header:



You will be brought to the **'Become a Compact Member'** page. Scroll down to the bottom of the page, and you will see a grid of applications you have started or submitted for your organization. To submit a new Compact Membership application, click **'Apply for Compact Membership'**:



The system will prompt you to register for the Upskill Maine Portal. If you received a portal invitation, you could redeem that here by pasting the link, or by following the instructions from the email and then apply. If you did not receive a portal invitation, you can enter your information on the **'Register'** tab:



## Contact Information

Once you register, you will be brought to the first page of the application; you will see Contact Information for the applicant (you).

The screenshot shows the 'Contact Information' page of the Compact Membership Application. The breadcrumb trail is 'Home > Become a Compact Member > Compact Membership Application'. The page title is 'Compact Membership Application'. There are three tabs: 'Contact Information' (active), 'Organization Information', and 'Points of Contact'. The form fields are: First Name \* (empty), Last Name \* (empty), Phone Number \* (placeholder: 'Provide a telephone number'), Phone Extension (empty), Email \* (value: 'lauren.polte+1@rsmus.com'), and Job Title \* (empty). A blue 'Next' button is at the bottom left.

Enter the required information on this page. Click 'Next'.

## Organization Information

On this page, you will enter your organization's information:

The screenshot shows the 'Organization Information' page of the Compact Membership Application. The breadcrumb trail is 'Home > Become a Compact Member > Compact Membership Application'. The page title is 'Compact Membership Application'. There are three tabs: 'Contact Information' (with a checkmark), 'Organization Information' (active), and 'Points of Contact'. The section title is 'Organization Information'. The form fields are: Organization Name \* (empty, with a note: 'Remove ALL punctuation and special characters (e.g., replace '&' with 'and')'), Business Description \* (empty), Website (empty), and What is your organization ? \* (dropdown menu with 'Select' selected).

There are some show/hide functionalities based on your responses.

**Functionalities to note:**

- **“What is your organization? →**
  - o Business/Municipality
    - **“Are you a sole proprietor or business?”**
      - Sole Proprietor → Enter **SSN**
      - Business → Enter **EIN**
    - Enter **“Number of full-time employees”**
    - Enter **“Number of part-time employees”**
    - Enter **“Number of seasonal employees”**
  - o Non-profit
    - Enter **EIN**
    - Enter **“Number of full-time employees”**
    - Enter **“Number of part-time employees”**
    - Enter **“Number of seasonal employees”**
    -
  - o Association
    - **“Are you a sole proprietor or business?”**
      - Sole Proprietor → Enter SSN
      - Business → Enter EIN
    - Enter **“Number of full-time employees”**
    - Enter **“Number of part-time employees”**
    - Enter **“Number of seasonal employees”**
    - Enter **“Number of members”**
- **“Is your company's business headquarters outside of Maine?” →** Enter headquarter address fields

Once you have entered the required information, click **‘Next’**.

**Points of Contact**

On this page, you will need enter contact information for your 3 different points of contact. As the applicant, you are the **‘Applying Contact’**.

If you are the person applicable to the **‘Business Point of Contact’**, **‘Authorized Signer Point of Contact’**, and **‘Financial Assigned Point of Contact’**, you will select **‘Yes’** to the **‘I am the...’** questions. This will set you to those points of contact once you submit your application. If you are not any of these contact points, enter their information.

The screenshot shows a web form titled "Compact Membership Application". At the top, there is a breadcrumb trail: "Home > Become a Compact Member > Compact Membership Application". Below the title, there are three tabs: "Contact Information" (with a checkmark), "Organization Information" (with a checkmark), and "Points of Contact" (highlighted in green). The "Applying Contact" section is visible, with the name "Lauren Testing (Do not use) Test". Below this is the "Business Point of Contact" section, which includes a description: "The primary contact for your organization who will serve as the main liaison with the Harold Alfond Center for the Advancement of Maine's Workforce and the Maine Community College System." There is a radio button question: "I am the Business Point of Contact \*", with "No" selected. Below the question are five input fields: "First Name \*", "Last Name \*", "Phone \*", "Email \*", and "Title \*". The "Phone" field has a placeholder text "Provide a telephone number".

Once you have entered the applicable information, upload your W9. You will not be able to submit your application until you upload a W9.

Once your W9 has been uploaded, click '**Submit**'. You should now see the submission page with your next steps.

## II. Create a Compact Membership Application in Upskill Maine GMS System

Navigate to the Compact Applications section. Click '+ New'.

### Enter required information

If you do not find the Contact you are looking for on any of the Points of Contacts, click into the field and click '+ New Contact' (your data will not be lost):

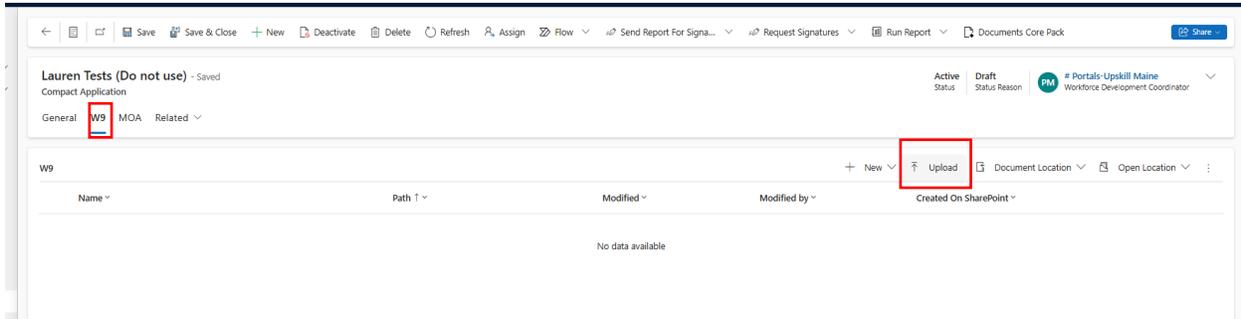
A blank Contact record window will open. To match the required data points on the portal, be sure to enter their **First Name, Last Name, Email, Phone Number, and Job Title**.

Once you have entered those 5 contact data points, click **'Save & Close'**. You should now see the contact you just created in the lookup. Below that, you can see their 5 data points displayed.

If this Contact is applicable for more than one Point of Contact, you can now search their name for the rest of the lookups.

After you have entered the required information, **save the record**.

After you save the record, you now have the ability to upload the W9. This can be done on the **'W9'** tab. *This functionality is not available until you have saved the record.*



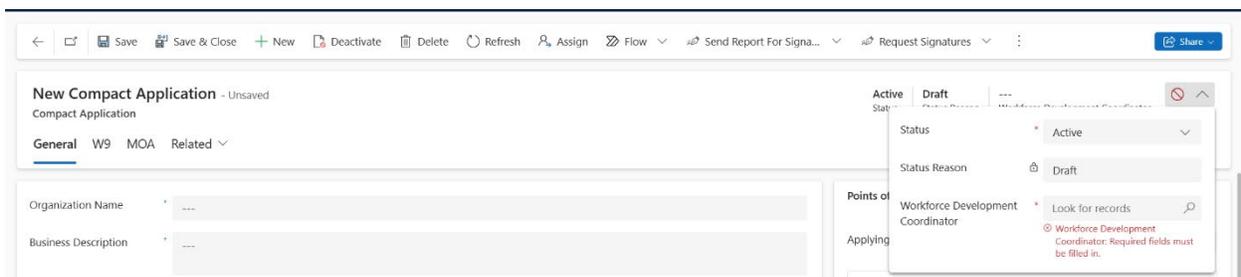
It will look like this if you have not saved the record:



## Assigning

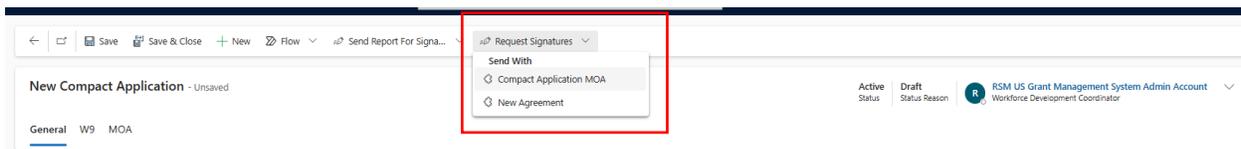
Assign yourself as the Workforce Development Coordinator, or someone else if applicable.

Whoever is assigned on the application will be the assigned Workforce Development Coordinator on the Account record.



## Send the MOA for signature

Now that the record has been saved, you can send the MOA out to be signed. You do this by clicking **'Request Signatures'** and selecting **'Compact Member MOA'**.



Sending the MOA is a one-click process. Once you select the Compact Application MOA, it will automatically send to the **'Authorized Signer'** contact. If you do not have the **'Authorized Signer'** contact populated, the MOA will not send and go into 'Draft' status. At this point, the Compact Membership application should be Inactive with the status of **'Approved'**.

To confirm the MOA has been sent, go to the **'MOA'** tab and see the status **'OUT FOR SIGNATURE'**.

If you see your MOA is in **'DRAFT'** status, something did not go correctly with sending the MOA. The most likely culprit is the **'Authorized Signer'** field was not populated.

If you need to make changes **after the MOA is sent**, you can **reactivate the record**.

**If the changes affect the Organization Name or the Authorized Signer's contact information, you must resend the MOA.**

Once you see the MOA has the status of **'OUT FOR SIGNATURE'**, no further action is needed from you. The Authorized Signer received the email from Adobe Sign and needs to complete on their end.

After they have signed the MOA, the MOA will come back into the system as **'SIGNED'**, and this will trigger the automation to create the Compact Member record. You will know the automation is done when you see the Compact Member account record populated in the **'Account'** field on the Compact Application. This may take a few minutes.

The screenshot shows a web interface for a Compact Application record. The record is titled "Town of Kennebunk - Saved" and is in "Inactive" status. The user "Kristen D Wiegand" is the current user. The record is associated with the "Town of Kennebunk" organization. The contact information for Kayla Tierney, Finance Director, is displayed. The "Associated Organization" field is highlighted with a red box, showing the account "Town of Kennebunk". The "Application Denial" section shows "Deny Application" set to "No" and "Denial Reason" is empty.

Field	Value
First Name	Kayla
Last Name	Tierney
Phone Number	(207) 604-1327
Phone Extension	
Email	ktierney@kennebunkmaine.us
Job Title	Finance Director
Associated Organization	Town of Kennebunk
Deny Application	No
Denial Reason	

On the newly created **'Account'** record you will see:

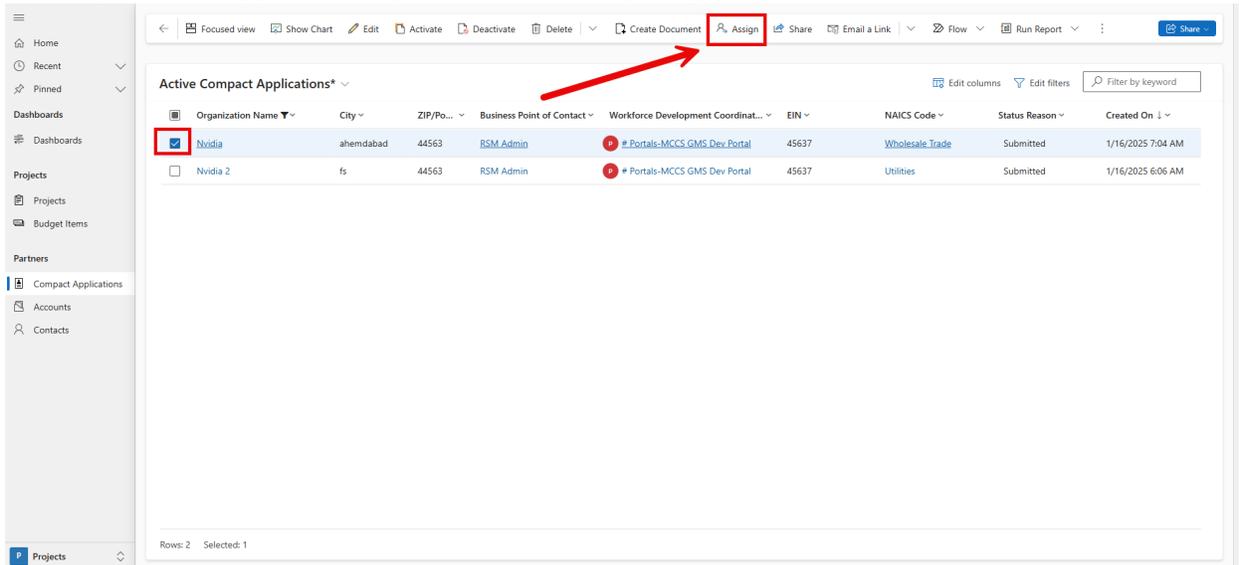
- Compact Membership status and start date, their Signed MOA and W9
- Connecting the Contacts created during the application as administrators on the new Account

### III. Receiving a Compact Membership Application in Upskill Maine GMS System

After a **Compact Application** has been created in the portal, you can find it in the **Compact Applications** page. Note that if someone began the application on the portal but hasn't submitted it yet, then it will have **Status Reason = Draft**. Once they have submitted it, the **Status Reason = Submitted**.

#### Assigning

You can **assign each application** to yourself or the relevant **Workforce Development Coordinator** by checking the record(s) from the grid and then clicking **Assign**:

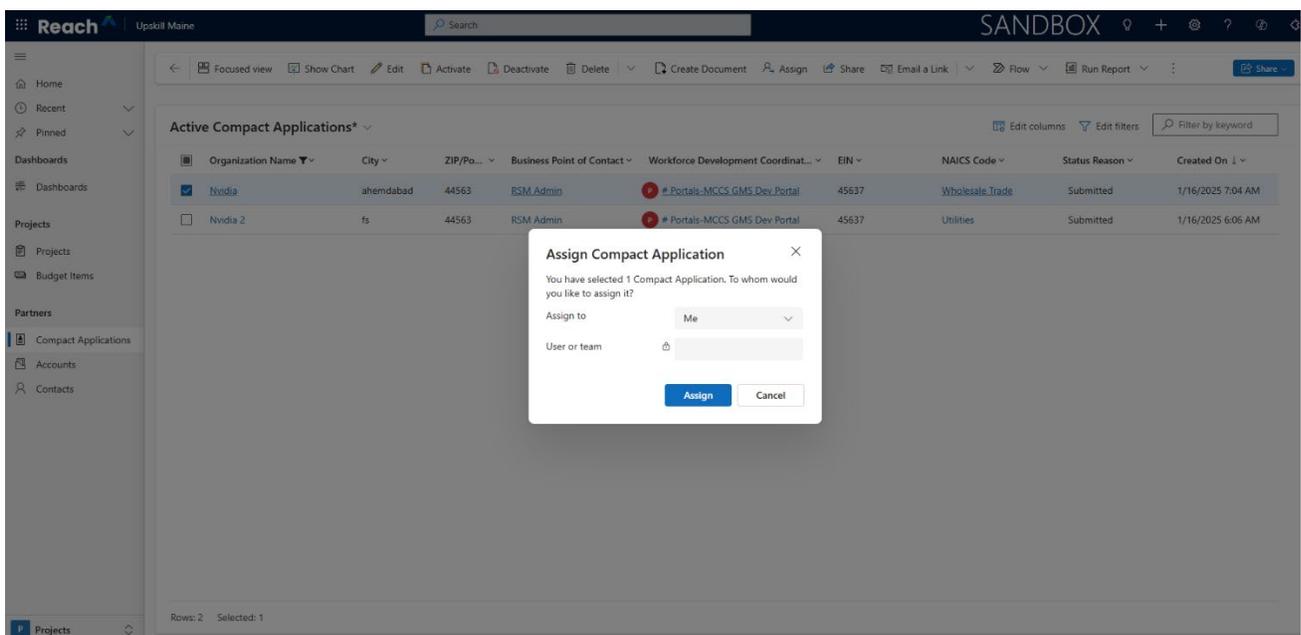


Organization Name	City	ZIP/Po...	Business Point of Contact	Workforce Development Coordinat...	EIN	NAICS Code	Status Reason	Created On
<input checked="" type="checkbox"/> Nvidia	ahemdabad	44563	RSM Admin	# Portals-MCCS GMS Dev Portal	45637	Wholesale Trade	Submitted	1/16/2025 7:04 AM
<input type="checkbox"/> Nvidia 2	fs	44563	RSM Admin	# Portals-MCCS GMS Dev Portal	45637	Utilities	Submitted	1/16/2025 6:06 AM

Then you either keep **Assign To** as **"Me"** or change it to the **User** you want to assign it to. **Note that you will still be able to Edit/Approve/Deny records that you aren't assigned to.**

This sets the **Workforce Development Coordinator** on both the **Compact Application** and the **Account record** that gets created when it is approved. **If you don't assign the Compact Application before it is Approved, you will have to assign it on the Account that gets created afterwards.**

However, **you don't need to assign it to yourself** if you know that the business is in another **Workforce Development Coordinator's territory**; you can assign it directly to them while you process it.



**Assign Compact Application**

You have selected 1 Compact Application. To whom would you like to assign it?

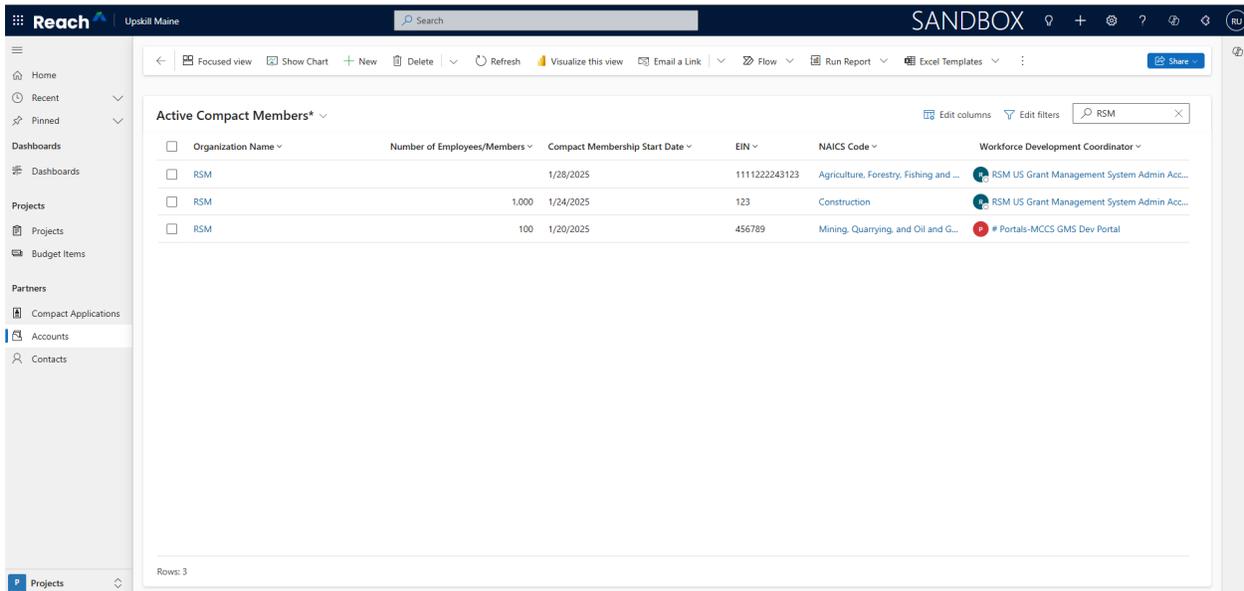
Assign to: Me

User or team: [Empty field]

Buttons: Assign, Cancel

## Check for Duplicates

As part of the **approval process**, you should check if there is already an **Account** in the system for that applicant. To do that, go to the **Accounts area** and search for that **Organization**, either based on their **name, EIN, or another attribute**:



The screenshot shows the 'Active Compact Members' table in the Reach application. The table has columns for Organization Name, Number of Employees/Members, Compact Membership Start Date, EIN, NAICS Code, and Workforce Development Coordinator. There are three rows of data.

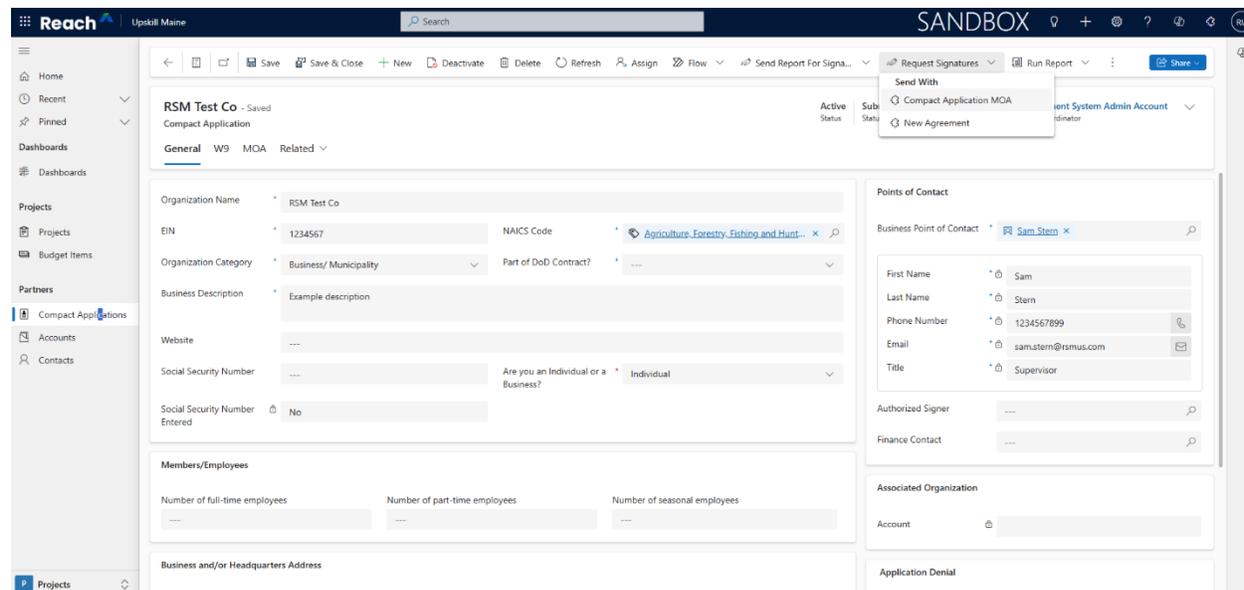
Organization Name	Number of Employees/Members	Compact Membership Start Date	EIN	NAICS Code	Workforce Development Coordinator
RSM		1/28/2025	1111222243123	Agriculture, Forestry, Fishing and ...	RSM US Grant Management System Admin Acc...
RSM	1,000	1/24/2025	123	Construction	RSM US Grant Management System Admin Acc...
RSM	100	1/20/2025	456789	Mining, Quarrying, and Oil and G...	Portals-MCCS GMS Dev Portal

- **If you find a duplicate that is already a Compact Member**, then please reach out to the applicant to let them know that their **organization is already a member** and recommend that they contact the **Account's Primary Contact** to be added as an **Organization Admin** on the portal.
- **If there is a duplicate that isn't already a Compact Member**, then process the application as normal. **However, if the Application is approved and Signed, you must merge the newly created Compact Member Account with the existing one.** This ensures that the **Account signs the MOA normally before becoming a Compact Member.**

## Send the MOA for signature

Before requesting a signature on the MOA, confirm that all 4 contacts have been populated. Once confirmed:

- Go to the "Request Signatures" option.
- Select "Compact Application MOA".



The screenshot shows the 'Request Signatures' dropdown menu for a Compact Application. The menu options are 'Send With', 'Compact Application MOA', and 'New Agreement'. The 'Compact Application MOA' option is selected.

The main form displays the details for 'RSM Test Co - Saved Compact Application'. The form is divided into several sections:

- General:** Organization Name (RSM Test Co), EIN (1234567), NAICS Code (Agriculture, Forestry, Fishing and Hunt...), Organization Category (Business/ Municipality), Business Description (Example description), Website, Social Security Number, and Social Security Number Entered (No).
- Members/Employees:** Number of full-time employees, Number of part-time employees, and Number of seasonal employees.
- Business and/or Headquarters Address:** Business and/or Headquarters Address.
- Points of Contact:** Business Point of Contact (Sam Stern), First Name (Sam), Last Name (Stern), Phone Number (1234567899), Email (sam.stern@rsmus.com), and Title (Supervisor).
- Authorized Signer:** Authorized Signer and Finance Contact.
- Associated Organization:** Account.
- Application Denial:** Application Denial.

This will utilize the **Compact Membership MOA template** to generate an **Adobe Sign agreement** and dynamically populate the information entered by the applicant (or by you). **The recipient of the MOA will automatically be set to the Authorized Signer contact.**

- When the **MOA is sent**, the **application record will deactivate as 'Approved'**.
- If you need to make changes **after the MOA is sent**, you can **reactivate the record**.
- **If the changes affect the Organization Name or the Authorized Signer's contact information, you must resend the MOA.**

For best practices, once you have sent the MOA, it is best to confirm the MOA was sent. You can do this by going to the MOA tab and seeing the status **'OUT FOR SIGNATURE'**.

If you see your MOA is in **'DRAFT'** status, something did not go correctly with sending the MOA. The most likely culprit is the **'Authorized Signer'** field was not populated

Read-only This record's status: Inactive

Waldo County Soil and Water Conservation District - Saved  
Compact Application

Inactive Status Approved Status Reason Christopher Allen Young Workforce Development Coordinator

General W9 MOA Related

MOA Agreements

Name	Agreement Status	Sent On	Signed On	Owner	Created On	Parent ...	Parent ...	Parent ...	Parent ...
Compact Membership MOA	OUT FOR SIGNATURE	2/26/2025 7:40 PM		Edward Wright (...)	2/26/2025 7:4...				

Rows: 1

Once the **Authorized Signer has signed** the document, the MOA will come back into the system as **'SIGNED'**. This will trigger the automation to create the Compact Member record. The system will mark the **inactive Compact Application** as **"Signed"** after the automation has run. This may take a few minutes.

The system will automatically **create the Account record** for that Compact Applicant, including:

- Compact Membership status and start date
- Storing their Signed MOA and W9
- Connecting the Contacts created during the application as administrators on the new Account

You will know the automation is done when you see the Compact Member account record populated in the **'Account'** field on the Compact Application.

Read-only This record's status: Inactive

Town of Kennebunk - Saved  
Compact Application

Inactive Status Signed Status Reason Kristen D Wiegand Workforce Development Coordinator

General W9 MOA Related

Finance Contact: Karla Tierney

First Name: Kayla  
Last Name: Tierney  
Phone Number: (207) 804-1327  
Phone Extension:  
Email: ktierney@kennebunkmaine.us  
Job Title: Finance Director

Associated Organization  
Account: Town of Kennebunk

Application Denial  
Deny Application: No  
Denial Reason:

## IV. Organization Management in Upskill Maine Portal

Once you have signed your MOA and the automation runs, you will be able to see ‘**Organization Management**’ option under the profile dropdown. This make take a few minutes to see on the portal.

To view/edit your organization’s information, and add/update Contacts related to your organization, navigate to the ‘**Organization Management**’ page.

The screenshot shows the top navigation bar of the Upskill Maine Portal. On the left is the logo for the Harold Alfond Center for the Advancement of Maine's Workforce, with the tagline "Short-term workforce training through Maine's community colleges". In the center are navigation links: "Home", "Become a Compact Member", and "Compact Member Funding Request". On the right, a user profile dropdown menu is open for "Lauren Polte", showing options: "Profile", "Additional Contact Information", "Organization Management" (highlighted), and "Sign out". Below the navigation bar, the breadcrumb "Home > Compact Member Funding Request" is visible. The main heading is "Compact Member Funding Request" with a sub-heading "2025 Funding Requests". A notice states: "We will start accepting 2025 funding requests on Monday, December 30, 2024. The Harold Alfond Center for the Advancement of Maine's Workforce is transitioning to its new grant effective January 1, 2025. A new Memorandum of Agreement..."

You can view/edit your organization’s information, along with details regarding your Compact Member status and Current Year Compact Funding Usage. You also have the option to request to become a training vendor.

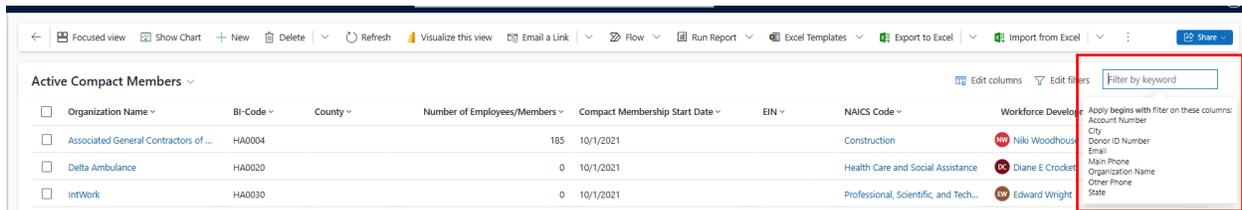
Here you can update any information needed, and give contacts with your organization permissions to submit funding requests:

The screenshot displays the "Key Contacts" management interface. It features three search fields: "Primary Contact" (containing "Lauren Polte"), "Finance Contact", and "Contracting Contact". Below these is a "Contacts" section with a "Create" button and a table with columns for "First Name", "Last Name", "Role", and "Email". A message "There are no records to display." is shown in the table. The "Organization Admins" section has a table with columns for "Full Name", "Email", and "Job Title", listing "Lauren Polte" as a "Supervisor" with email "lauren20@rsmus.com". The "Program Contact" section also has a table with columns for "Full Name", "Email", and "Job Title", with a "There are no records to display." message. A "Save" button is located at the bottom left.

## V. Organization Management in Upskill Maine GMS System

To manage a Compact Member's account, navigate to 'Accounts' in the left-side navigation and find the Compact Member you are looking for.

You can search by any of these values:



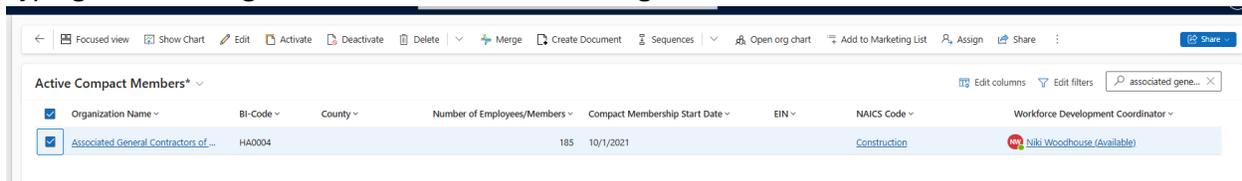
The screenshot shows a table of Active Compact Members. A search filter dropdown is open, showing a list of columns to filter by: Account Number, City, Donor ID Number, Email, Main Phone, Organization Name, Other Phone, and State. The dropdown is highlighted with a red box.

Organization Name	BI-Code	County	Number of Employees/Members	Compact Membership Start Date	EIN	NAICS Code	Workforce Development Coordinator
Associated General Contractors of ...	HA0004		185	10/1/2021		Construction	Niki Woodhouse
Delta Ambulance	HA0020		0	10/1/2021		Health Care and Social Assistance	Diane E Crockett
IntWork	HA0030		0	10/1/2021		Professional, Scientific, and Tech...	Edward Wright

If you cannot find the record you are looking for, try putting an \* in front of what you are typing in. This will allow you to search any part of any field in the columns.

For example:

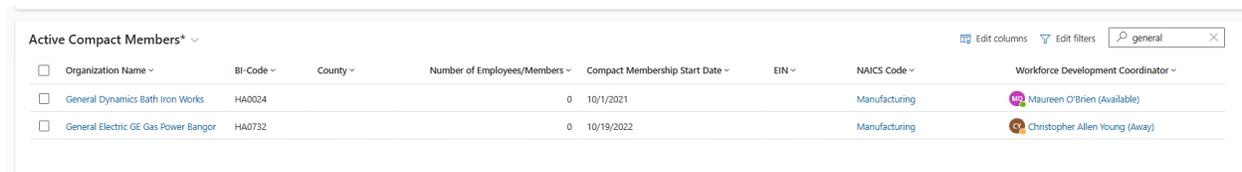
Typing 'associated general' finds the record that begins with that value:



The screenshot shows the Active Compact Members table with the search filter set to 'associated gene...'. The record for 'Associated General Contractors of ...' is highlighted.

Organization Name	BI-Code	County	Number of Employees/Members	Compact Membership Start Date	EIN	NAICS Code	Workforce Development Coordinator
Associated General Contractors of ...	HA0004		185	10/1/2021		Construction	Niki Woodhouse (Available)

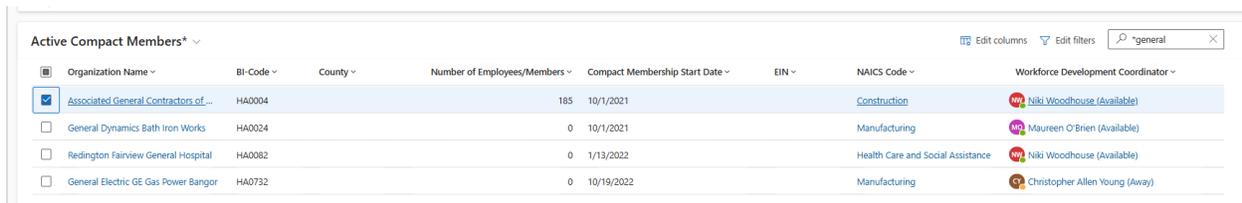
Typing 'general' does not show the record I am looking for:



The screenshot shows the Active Compact Members table with the search filter set to 'general'. The record for 'Associated General Contractors of ...' is not shown.

Organization Name	BI-Code	County	Number of Employees/Members	Compact Membership Start Date	EIN	NAICS Code	Workforce Development Coordinator
General Dynamics Bath Iron Works	HA0024		0	10/1/2021		Manufacturing	Maureen O'Brien (Available)
General Electric GE Gas Power Bangor	HA0732		0	10/19/2022		Manufacturing	Christopher Allen Young (Away)

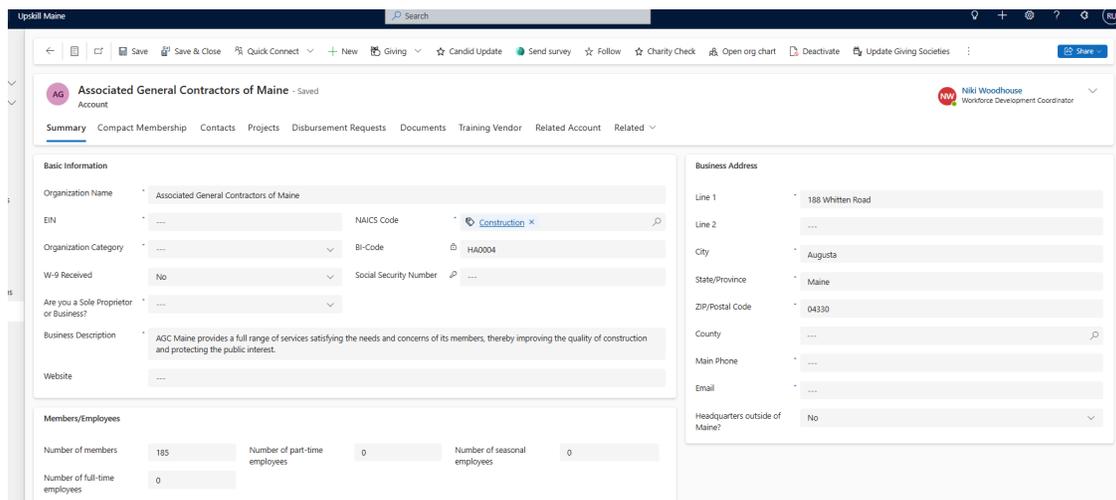
If you type '\*general', you will find the record you are looking for:



The screenshot shows the Active Compact Members table with the search filter set to '\*general'. The record for 'Associated General Contractors of ...' is highlighted.

Organization Name	BI-Code	County	Number of Employees/Members	Compact Membership Start Date	EIN	NAICS Code	Workforce Development Coordinator
Associated General Contractors of ...	HA0004		185	10/1/2021		Construction	Niki Woodhouse (Available)
General Dynamics Bath Iron Works	HA0024		0	10/1/2021		Manufacturing	Maureen O'Brien (Available)
Redington Fairview General Hospital	HA0082		0	1/13/2022		Health Care and Social Assistance	Niki Woodhouse (Available)
General Electric GE Gas Power Bangor	HA0732		0	10/19/2022		Manufacturing	Christopher Allen Young (Away)

Once you have found the record you are looking for, double click into the row and the Account record will open.



The screenshot shows the Account record for 'Associated General Contractors of Maine'. The record is open, showing details such as Organization Name, EIN, NAICS Code, Organization Category, BI-Code, W-9 Received, and Business Description. The Business Address is also visible.

**Basic Information**

- Organization Name: Associated General Contractors of Maine
- EIN: ...
- NAICS Code: Construction
- Organization Category: ...
- BI-Code: HA0004
- W-9 Received: No
- Social Security Number: ...
- Are you a Sole Proprietor or Business?: ...
- Business Description: AGC Maine provides a full range of services satisfying the needs and concerns of its members, thereby improving the quality of construction and protecting the public interest.
- Website: ...

**Members/Employees**

- Number of members: 185
- Number of part-time employees: 0
- Number of seasonal employees: 0
- Number of full-time employees: 0

**Business Address**

- Line 1: 188 Whitten Road
- Line 2: ...
- City: Augusta
- State/Province: Maine
- ZIP/Postal Code: 04330
- County: ...
- Main Phone: ...
- Email: ...
- Headquarters outside of Maine?: No

You can view information brought over from their Compact Membership Application. This includes:

- **Compact Membership:** Compact Membership status and start date
- **Contacts:** Contacts associated with the Account and any permissions they may have
- **Projects:** Funding Requests they have submitted
- **Disbursement Requests:** Disbursements sent out
- **Documents:** W9 and signed MOA
  - o This may be blank if the account was moved with the migration
    - For example: If W9 is set to 'No' that means this account was created with the migration
- **Training Vendor:** if they are an approved training vendor, this will be a list of Funding Requests they are the training vendor for
- **Related Account:** if they are a parent/child of another Compact Member, you will see that here

## Adding Contacts

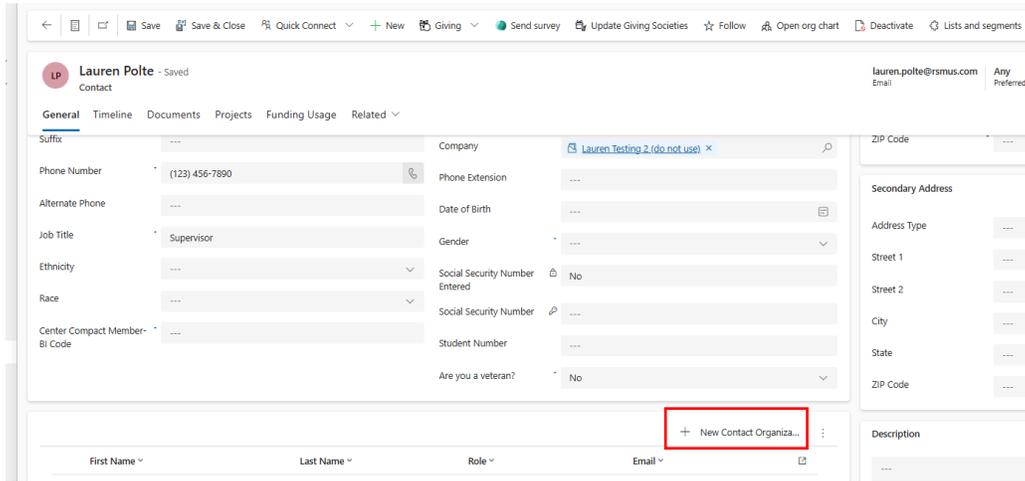
If you need to add a Contact that does not already exist to a Compact Member as an Organization Admin or Program Contact, click **'+ New Contact'** in the **'Contacts'** grid:

*Note: clicking + New Contact on the Organization Admins or Program Contacts grid will not give them permissions. If you do add on one of those grids, they will not show there. They will only show in the Contacts grid until you follow the instructions below to give them permissions.*

The screenshot shows the 'Associated General Contractors of Maine' account page. The 'Contacts' grid is visible, with a red box highlighting the '+ New Contact' button. The 'Quick Create: Contact' pop-out form is open, showing fields for First Name, Last Name, Email, Job Title, Mobile Phone, Date of Birth, Address 1: Street 1, Address 1: Street 2, City, and ZIP/Postal Code. The 'Save and Close' button is highlighted in blue.

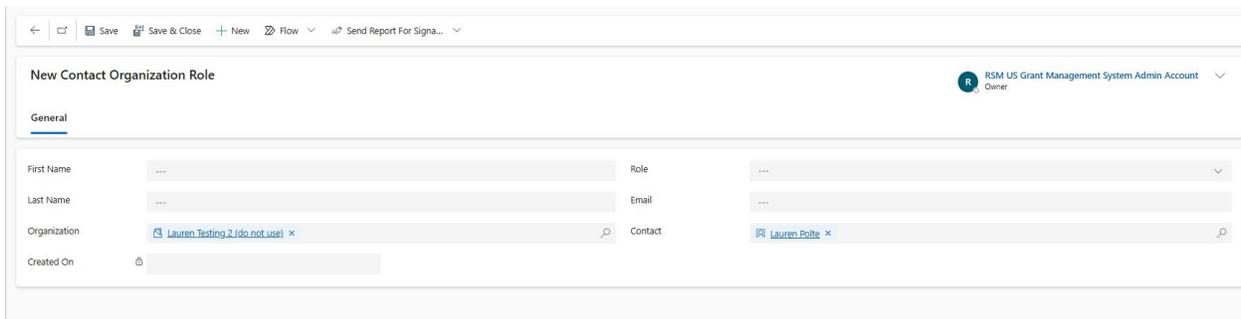
A pop-out will show to enter the contact information (The populated address is pulled from the Account address; you will need to update this). This will automatically relate the contact to the account.

Once you add the contact, you will see them appear in the **'Contacts'** grid. At this point, they do not have any permissions for this account. You will need to open their contact and add a Contact Organization Role record (this will take you away from the Account record).



The screenshot shows a contact record for Lauren Polte. The contact information is populated, including phone number (123) 456-7890 and company (Lauren Testing 2 (do not use)). A red box highlights the '+ New Contact Organization Role' button at the bottom right of the contact record.

Once you click **'+ New Contact Organization Role'**, a new page will open.



The screenshot shows the 'New Contact Organization Role' form. The form is titled 'New Contact Organization Role' and is for the account 'RSM US Grant Management System Admin Account'. The form fields are:

Field	Value	Field	Value
First Name	---	Role	---
Last Name	---	Email	---
Organization	Lauren Testing 2 (do not use)	Contact	Lauren Polte
Created On	---		

The organization will be populated with the **'Company'** that is populated on the Contact. Here, you will need to enter their **First Name, Last Name, Role, and Email**. Once you have entered this, click **'Save & Close'**

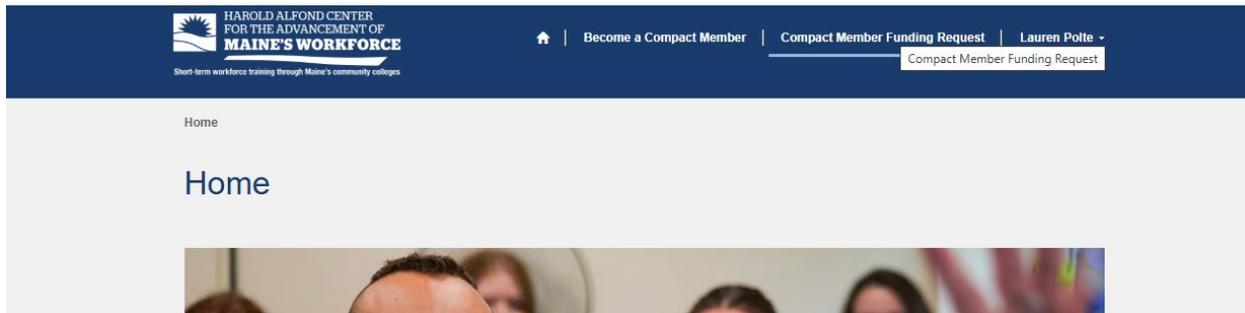
You will see the Contact Organization Role record you just created in the grid on the contact. Now, you can navigate back to the Account and see the Contact in the appropriate grid based on the permissions you gave them.

## VI. Create a Funding Request in Upskill Maine Portal

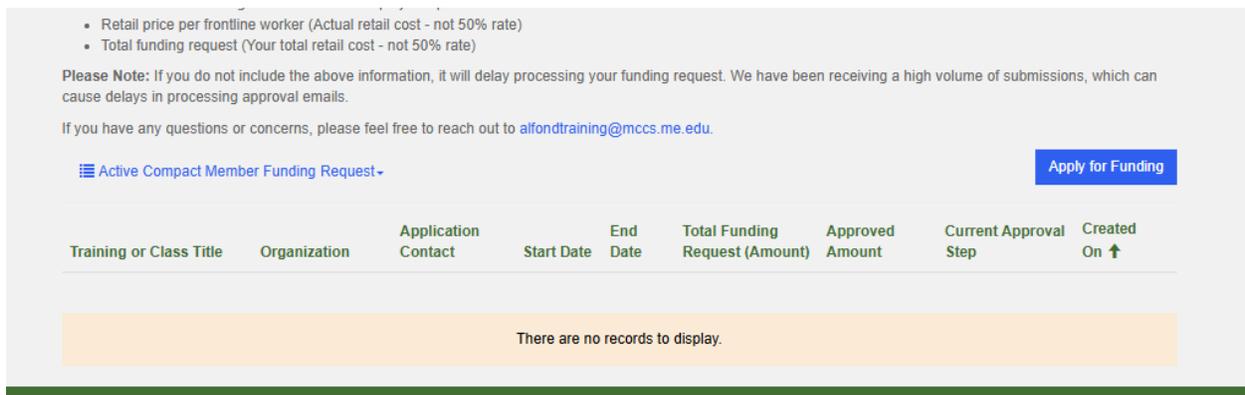
### Beginning an application

Navigate to the portal: <https://upskillmaine.powerappsportals.com/>

Select 'Compact Member Funding Request' from the header (*Note: you can only access this page if you are signed in as an Org Admin or Program Contact for the organization*):

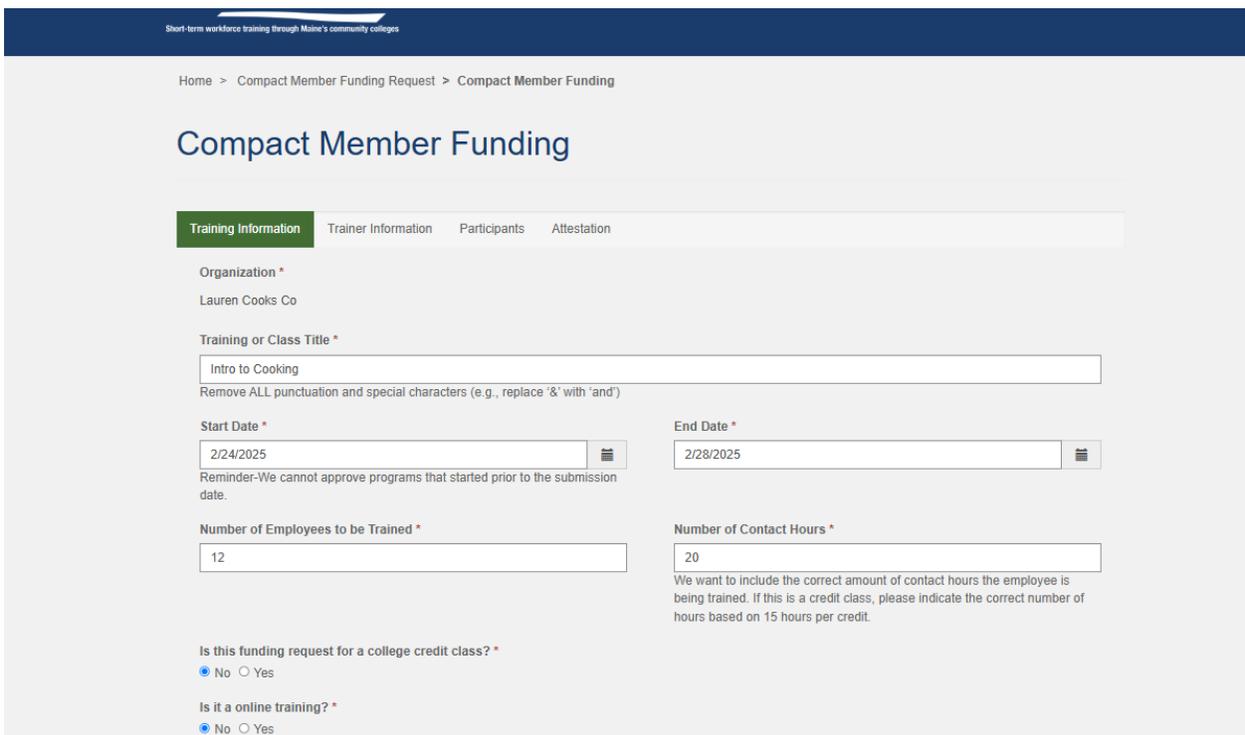


You will be brought to the 'Compact Member Funding Request' page. Scroll down to the bottom of the page, and you will see a grid of Funding Requests you have started or submitted for your organization. To submit a new Funding Request, click 'Apply for Funding':



### Training Information

You are now at the beginning of the Funding Request application, on the 'Training Information'. Here, you will enter the information of your training. Note the Organization you are submitting a request for – this will be the Organization associated with your profile, based on your email.



There are some show/hide functionalities and calculated fields based on your responses.

**Functionalities to note:**

- “Is it an online training?” → “Training Link” field will show
- “Is this funding request for a college credit class?” → “Number of Credits” will show
- “The training cost is at a flat rate regardless of number of attendees”
  - o If ‘No’
    - You will enter “Number of Employees to be Trained” and “Retail Price per Frontline Worker” → “Total Funding Request” will be calculated
  - o If ‘Yes’
    - You will enter “Number of Employees to be Trained” and “Total Funding Request” → “Retail Price per Frontline Worker” will be calculated
- “Does this training lead to a credential?” → “Credential Type” will show

After you entered the required information, click “Next”.

**Trainer Information**

You are now on the ‘Trainer Information’ page.

Select an option from the dropdown:

Home > Compact Member Funding Request > Compact Member Funding

## Compact Member Funding

Training Information ✓ Trainer Information Participants Attestation

Please provide us with WHO is providing the training as the training vendor and not the HOST of the training.

If the training is being provided by a third-party training vendor (not by one of Maine's Community Colleges), please review the list of our third party training partners.

Training Provider Type \*

- Select
- Select**
- Maine Community College
- Other Training Vendor
- Internal Training

Based on your selection, more information will show for you to fill out:

**Training Provider Type = Maine Community College**

Home > Compact Member Funding Request > Compact Member Funding

## Compact Member Funding

Training Information ✓ Trainer Information Participants Attestation

Please provide us with WHO is providing the training as the training vendor and not the HOST of the training.

If the training is being provided by a third-party training vendor (not by one of Maine's Community Colleges), please review the list of our third party training partners.

Training Provider Type \*

Maine Community College

Maine Community College \*

- Central Maine Community College: CMCC

## Other Training Vendor:

Home > Compact Member Funding Request > Compact Member Funding

### Compact Member Funding

Training Information ✓ **Trainer Information** Participants Attestation

Please provide us with WHO is providing the training as the training vendor and not the HOST of the training.

If the training is being provided by a third-party training vendor (not by one of Maine's Community Colleges), please review the list of our third party training partners.

Training Provider Type \*

Other Training Vendor

Training Vendor \*

1EdTech

Address : Line 1	City
1EdTech	Lake Mary
Address : Line 2	ZIP/Postal Code
801 Intenational Parkway 5th Floor, PMB #12	32746
Primary Contact	Email
—	events@1edtech.org
EIN	Main Phone
—	4073627783

Does your training vendor appear in the drop down? \*

Yes

If you select a Trainer from the approved vendors list, their information will display.

If you do not find the training vendor you are looking for in the dropdown list, change **'Does your training vendor appear in the drop down?'** to **'No'**. Enter the training vendor's information:

### Compact Member Funding

Training Information ✓ **Trainer Information** Participants Attestation

Please provide us with WHO is providing the training as the training vendor and not the HOST of the training.

If the training is being provided by a third-party training vendor (not by one of Maine's Community Colleges), please review the list of our third party training partners.

Training Provider Type \*

Other Training Vendor

Does your training vendor appear in the drop down? \*

No

Vendor Name *	Vendor Phone *
	Provide a telephone number
Vendor Email *	Vendor Website
Vendor Address Line 1 *	Vendor Address Line 2
Vendor City *	Vendor State *
Vendor Zip *	

Previous Next

When you are done, click **'Next'**.

## Participants

You are now on the 'Participants' step in the application. Here you can download a Participant Template to upload your participants. If you would like to manually enter participants, you have that option as well:

Home > Compact Member Funding Request > Compact Member Funding

### Compact Member Funding

Training Information ✓ Trainer Information ✓ **Participants** Attestation

Please utilize [this template](#) to upload a list of your training participants. The file must be in .xlsx format, and you may rename it as needed before uploading. Uploaded participants may take a few minutes to appear in the 'List of Participants' grid—refresh the page as needed; your data will not be lost.

To add participants manually, click the 'Add Participant' button below. The 'List of Participants' grid will display both manually entered and uploaded participants. Please allow a few minutes for all participant details to populate.

Upload the list of participants by clicking on "Add Files" Button

[Add files](#)

There are no folders or files to display.

List of Participants [Add Participant](#)

First Name	Last Name	Current Funding Usage	Amount Requested	Points of Light Provided
There are no records to display.				

[Previous](#) [Next](#) [Clear out all the Participants](#)

Once you have added your participants, they will appear in the 'List of Participants' grid. This may take a few minutes. You can refresh your screen if need – your data will not be lost:

Home > Compact Member Funding Request > Compact Member Funding

### Compact Member Funding

Training Information ✓ Trainer Information ✓ **Participants** Attestation

Please utilize [this template](#) to upload a list of your training participants. The file must be in .xlsx format, and you may rename it as needed before uploading. Uploaded participants may take a few minutes to appear in the 'List of Participants' grid—refresh the page as needed; your data will not be lost.

To add participants manually, click the 'Add Participant' button below. The 'List of Participants' grid will display both manually entered and uploaded participants. Please allow a few minutes for all participant details to populate.

Upload the list of participants by clicking on "Add Files" Button

[Add files](#)

Name ↑	Modified
Participant Upload Template (20).xlsx (18 KB)	2/19/2025 7:29 AM

Upload Status  
Upload Completed

List of Participants [Add Participant](#)

First Name	Last Name	Current Funding Usage	Amount Requested	Points of Light Provided
Madison	Trent	\$0.00	\$60.00	No
Mary Kate	Short	\$0.00	\$60.00	No

[Previous](#) [Next](#) [Clear out all the Participants](#)

Once your participants have been added, you will be able to see their Current Funding Usage for this year, along with the amount you are requesting per participant for this training – this is based on calculations from your funding entries on the ‘Training Information’ page. You will also see if the participants have entered their full contact information.

If you need to start over with the list of participants you added, you can click the ‘Clear out all the Participants’ button, and it will remove the participants from the training you are requesting.

**List of Participants** [Add Participant](#)

First Name	Last Name	Current Funding Usage	Amount Requested	Points of Light Provided
Madison	Trent	\$0.00	\$60.00	No
Mary Kate	Short	\$0.00	\$60.00	No

[Previous](#) [Next](#) [Clear out all the Participants](#)

Once you see your participants listed, click ‘**Next**’.

### Attestation

On the ‘Attestation’ page, you must acknowledge the statement. Then, click ‘**Submit**’.

You will be brought to the successful submission screen that contains your next steps:

Home > Compact Member Funding Request > Compact Member Funding

## Compact Member Funding

Your Funding Request has been submitted successfully!

**Next Steps:**

- Full Participant Information**  
Ensure that all listed participants in the training complete their full profile information. They will receive an email invitation with instructions on how to access this platform and provide the necessary details.
- Additional Information May Be Required**  
As our team reviews your funding request, we may need further details or clarification. If additional information is required, you will receive an email from our team. Please monitor your inbox and respond promptly to avoid any delays in processing your request.
- Amendments**  
If at anytime you need to add or remove participants from the training after you have submitted your request, you can submit an Amendment Request. This option can be found on your [Funding Request list](#).
- Withdraw Request**  
You have the ability to withdraw your application at any stage. This will end the process of your Funding Request. This option can be found on your [Funding Request list](#).
- Approved Funding Notification**  
If your funding request is approved, the allocated amount will be displayed in the "Approved Amount" column within your [Funding Request list](#). You will receive a notification once this update has been made.

To see your list of active and submitted Funding Requests, click ‘**Compact Member Funding Request**’ at the top of the page.

You can now see your submitted funding request. It is in the stage of ‘**Assign Funding**’, which means it is being evaluated by MCCS staff for funding:

[Active Compact Member Funding Request](#) [Apply for Funding](#)

Training or Class Title	Organization	Application Contact	Start Date	End Date	Requested Amount	Approved Amount	Current Approval Step	Created
Intro to Cooking	Lauren Cooks Co	Lauren Polte	2/24/2025	2/28/2025	\$1,200.00		2) Assign Funding	2/19/2025 7:06 AM

You can no longer edit your application. You can view your submitted application, withdraw your application, or make an amendment request regarding participant changes or a date change.

If you have any questions or concerns, please feel free to reach out to [alfondtraining@mccs.me.edu](mailto:alfondtraining@mccs.me.edu).

[Active Compact Member Funding Request -](#) [Apply for Funding](#)

Training or Class Title	Organization	Application Contact	Start Date	End Date	Requested Amount	Approved Amount	Current Approval Step	Created On ↑	
Intro to Cooking	Lauren Cooks Co	Lauren Polte	2/24/2025	2/28/2025	\$1,200.00		2) Assign Funding	2/19/2025 7:06 AM	<a href="#">View</a> <a href="#">Withdraw Application</a> <a href="#">Amendment Request</a>

Contact Us | [mccsalfondtraining@maineccc.edu](mailto:mccsalfondtraining@maineccc.edu) | 207.629.4000

Maine Community College System  
323 State Street

## View Request

A read-only version of your funding request:

Home > Compact Member Funding Request > Compact Member Funding

## Compact Member Funding

[Training Information](#) [Trainer Information](#) [Participants](#) [Attestation](#)

Organization	Lauren Cooks Co	Program Title *	Intro to Cooking
Start Date *	2/24/2025	End Date *	2/28/2025
Number of Employees to be Trained *	12	Number of Hours *	20
Retail Price per Frontline Worker *	\$100.00	Total Funding Request (Amount) *	\$1,200.00
Request a 10% Admin Reimbursement Rate *	<input type="radio"/> No <input checked="" type="radio"/> Yes	This training cost is at a flat rate regardless of the number of attendees *	<input checked="" type="radio"/> No <input type="radio"/> Yes
Brief description of the course	test	How will training enhance employee growth?	test

### Funding Details

Amount Obligated	Invoice Number	Class ID	Course Code
------------------	----------------	----------	-------------

The **'Funding Details'** section will be populated once your request has gone through the approval process.

## Withdraw Application

Stop your application and remove it for the funding process

The screenshot shows a 'Withdraw Application' dialog box with the text: 'Are you sure you want to withdraw your application? This action cannot be undone.' Below the text are two buttons: 'Confirm' and 'Go Back'. The background is a blurred view of a '2025 Funding Request' form. The form includes a title 'Workforce Development Funds', a thank you message, and two sections: 'Part A: Company Information' and 'Part B: Training Information'. Part A includes instructions to confirm company selection and provide contact info. Part B includes instructions for training vendor details, program titles, course descriptions, and dates.

## Amendment Request

Make changes to your participant list or change the start and end date for your training

The screenshot shows the 'Amendment Information' form. At the top, there is a breadcrumb trail: 'Home > Compact Member Funding Request > Amendment Information'. The main heading is 'Amendment Information'. The form contains several fields: 'Training or Class Title \*' (Intro to Cooking), 'Start Date \*' (2/24/2025), and 'End Date \*' (2/28/2025). Below these are 'Requested Start Date' and 'Requested End Date' fields, both with date pickers. There is a large text area for 'Amendment Information'. At the bottom, there is a 'List of Participants' section with an 'Add Participant' button. The table below has columns for 'First Name', 'Last Name', 'Email', and 'Amendment Request'. It lists two participants: Madison Trent (maddie.trent@gmail.com) and Mary Kate Short (mkatherine@gmail.com). A 'Submit' button is located at the bottom left.

You have the option to remove Participants, add new Participants, request to change the date of the training, and add notes to explain your amendments, if necessary:

This screenshot shows a close-up of the 'List of Participants' table. It includes the 'Add Participant' button and the table with columns for 'First Name', 'Last Name', 'Email', and 'Amendment Request'. The participants listed are Madison Trent and Mary Kate Short. A 'Remove Participant' button is shown as a tooltip over the dropdown arrow for the 'Amendment Request' column of the first participant.

AROLD ALFOND CENTER  
OR THE ADVANCEMENT OF  
MAINE'S  
training the

Lauren Polte -

### Amendment Request

First Name \*

Last Name \*

Alternative First Name

Email \*

Date of Birth

Job Title \*

Suffix

Amendment Request  
Added

## External Training Closeout

If your training was conducted by an external training vendor and the training end date has passed, you will see the option for 'Closeout'. Once your training has reached the 'Closeout' stage, you can no longer submit Amendment Requests.

If you have any questions or concerns, please feel free to reach out to [alfondtraining@mccs.me.edu](mailto:alfondtraining@mccs.me.edu).

[Active Compact Member Funding Request -](#)

Training or Class Title	Organization	Application Contact	Start Date	End Date	Requested Amount	Approved Amount	Current Approval Step	Created On ↑	
Intro to Cooking	Lauren Cooks Co	Lauren Polte	2/24/2025	2/17/2025	\$1,200.00	\$1,200.00	3) Closeout	2/19/2025 7:06 AM	<input type="button" value="View"/> <input type="button" value="Withdraw Application"/> <input type="button" value="Closeout Information"/>

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Maine Community College System  
323 State Street

Here you will enter the participant's training result:

Home > Compact Member Funding Request > Closeout Information

## Closeout Information

Training or Class Title *	Start Date *	End Date *
Intro to Cooking	2/24/2025	2/17/2025

**List of Participants**

Contact	Email (Contact)	Job Title (Contact)	Current Year Compact Funding Usage (Contact)	Points of Light Provided	Budget Amount	Participant Result
Madison Trent	maddie.trent@gmail.com	Waitress	\$0.00	No	\$60.00	<input type="button" value="View"/>
Mary Kate Short	mkatherine@gmail.com	Waitress	\$0.00	No	\$60.00	<input type="button" value="View"/>

# Closeout

Training or Cla  
Intro to Cooking

List of Particip

Contact

Madison  
Trent

Mary Kate  
Short

Submit

## Closeout Information



First Name \*

Madison

Last Name \*

Trent

Email \*

[maddie.trent@gmail.com](mailto:maddie.trent@gmail.com)

Budget Amount

\$60.00

Points of Light Provided

No  Yes

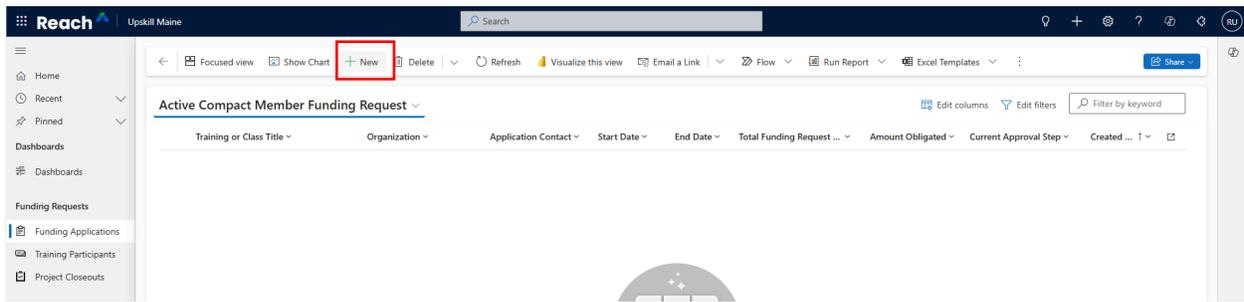
Participant Result

Select

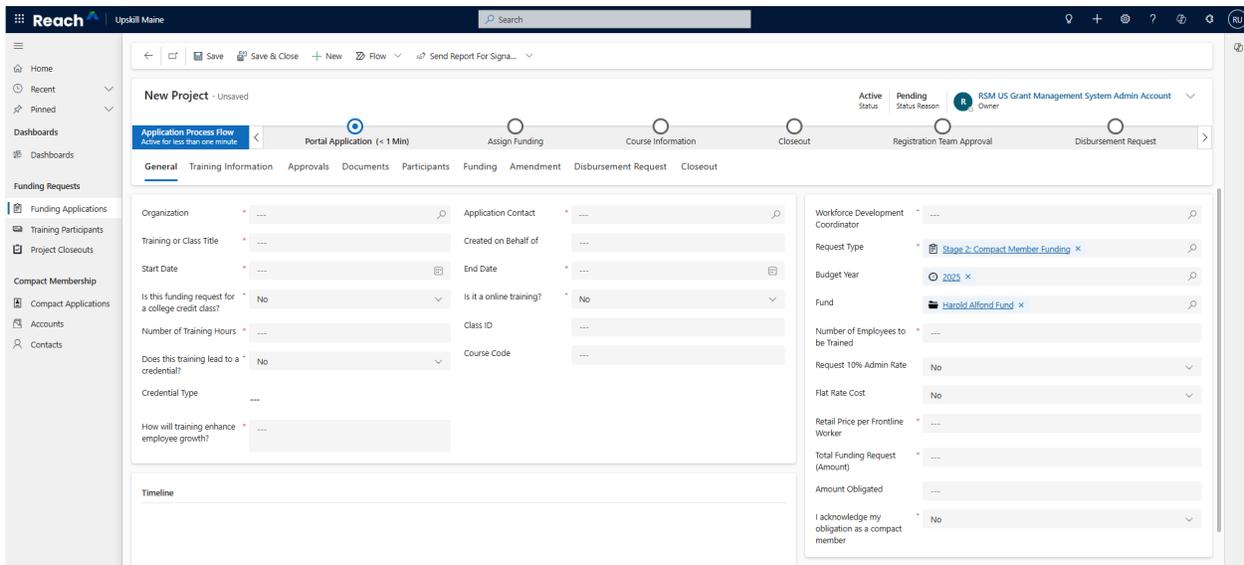
Submit

## VII. Creating a Funding Request in Upskill Maine GMS System

Navigate to the 'Funding Requests' area in the left-side navigation. Click '+ New'.



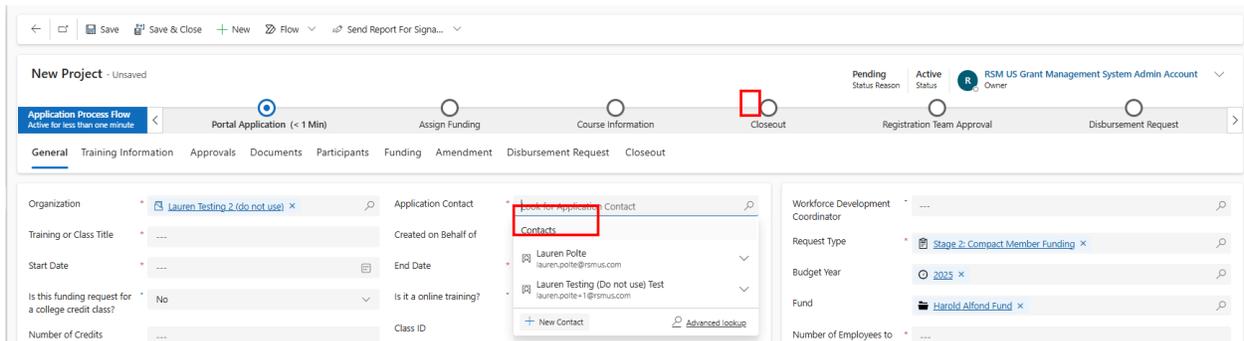
### Enter required information



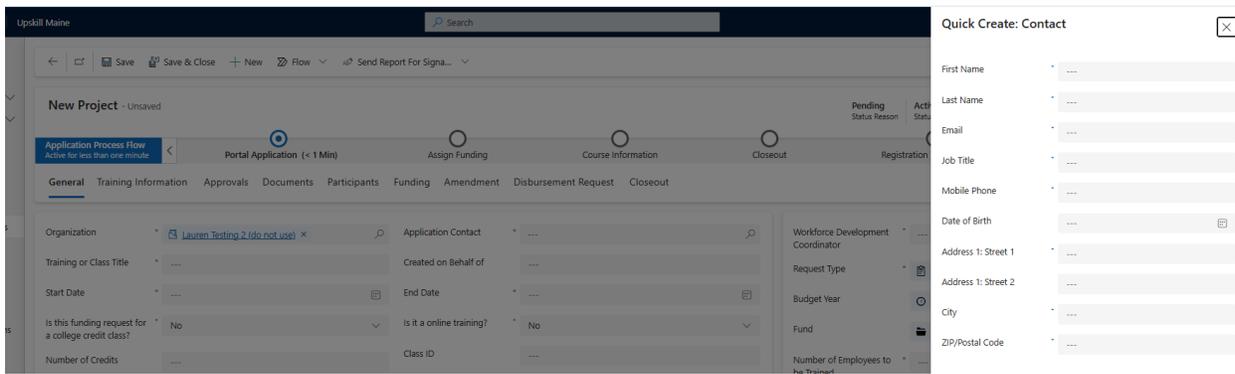
Begin by searching for the 'Organization'.

### Adding Application Contact

Once you find the Compact Member you are looking for, search for the 'Application Contact'. The contact list will display contacts that are already a part of the Compact Member (you may need to click the magnifying glass for the contacts to show). If you do not find who you are looking for, you can add a new contact:



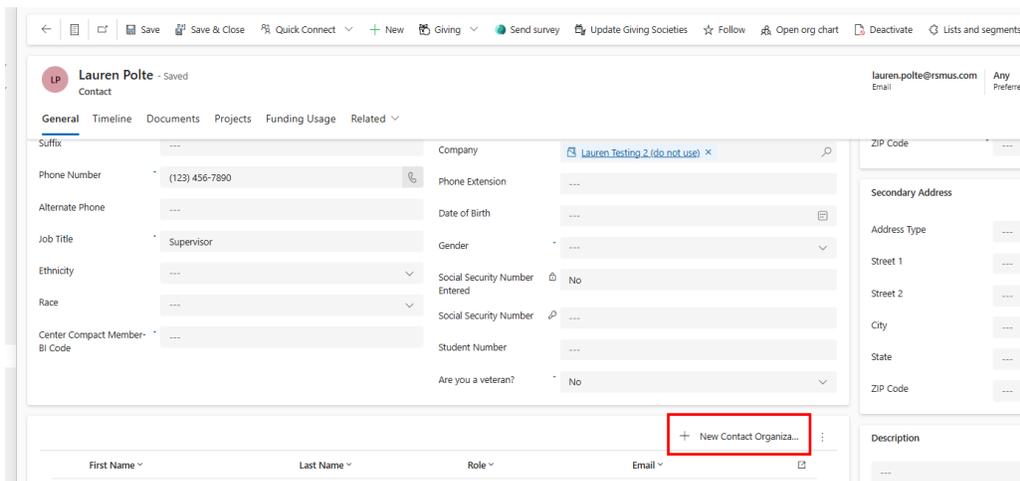
A pop-out window will open for you to add the contact information:



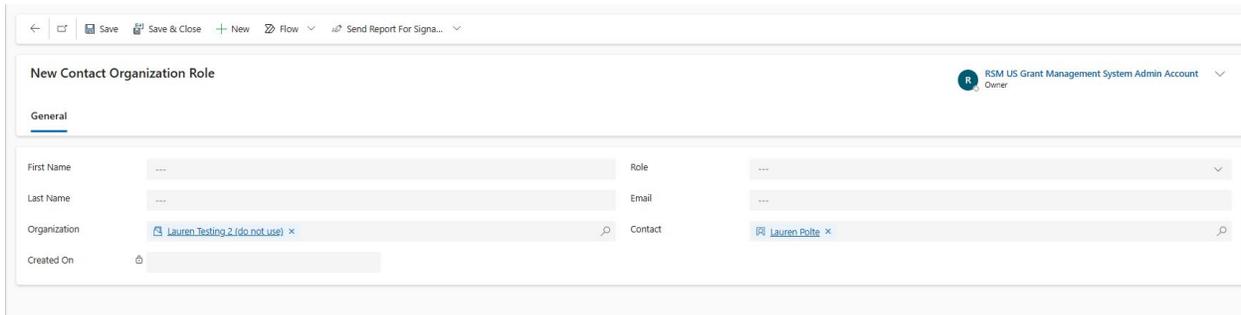
When you are done entering the contact information, click **'Save & Close'**. You will see the Contact populate now in the **'Application Contact'**.

Adding the contact here did not associate the contact with the compact member. You will need to navigate to the contact record to populate their **'Company'** with this compact member. The best option is to open Upskill Maine GMS system in a new window, search for the contact and populate the company. You will also need to add a Contact Organization Role for this contact, so they receive the permissions to complete the attestation in the portal.

You will need to open their contact and add a Contact Organization Role record (this will take you away from the Account record).



Once you click **'+ New Contact Organization Role'**, a new page will open.



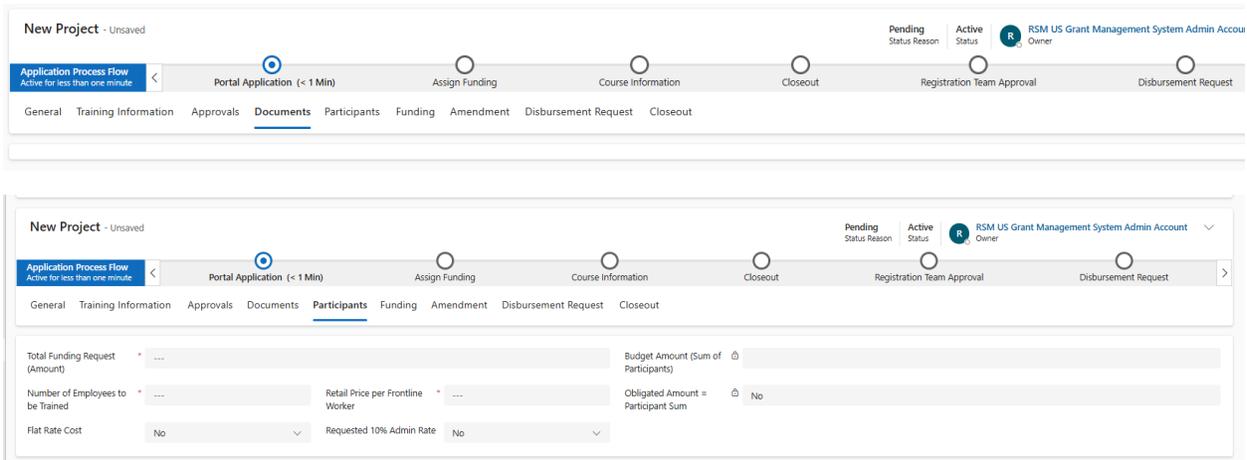
The organization will be populated with the **'Company'** that is populated on the Contact. Here, you will need to enter their **First Name, Last Name, Role, and Email**. Once you have entered this, click **'Save & Close'**

You will see the Contact Organization Role record you just created in the grid on the contact.

Now you can return to the Funding Request and complete the rest of the information.

You need to enter all the required information on the **'General'** and **'Training Information'** tabs. Once you have done so, click **'Save'**. You will not be able to upload a participants excel file or view the participants grid until you save the record.

Documents and Participants tabs will look like this until you save the record:

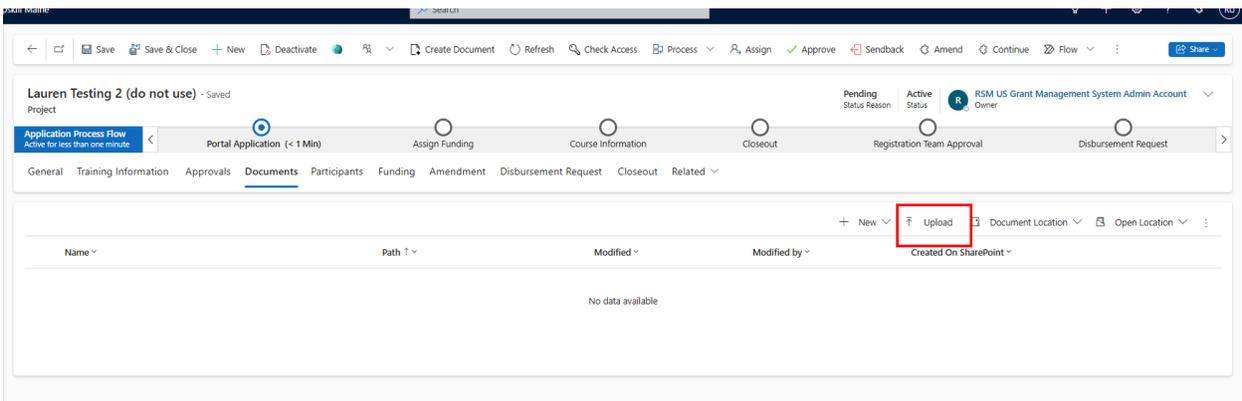


Once saved, you can add participants.

## Adding Participants

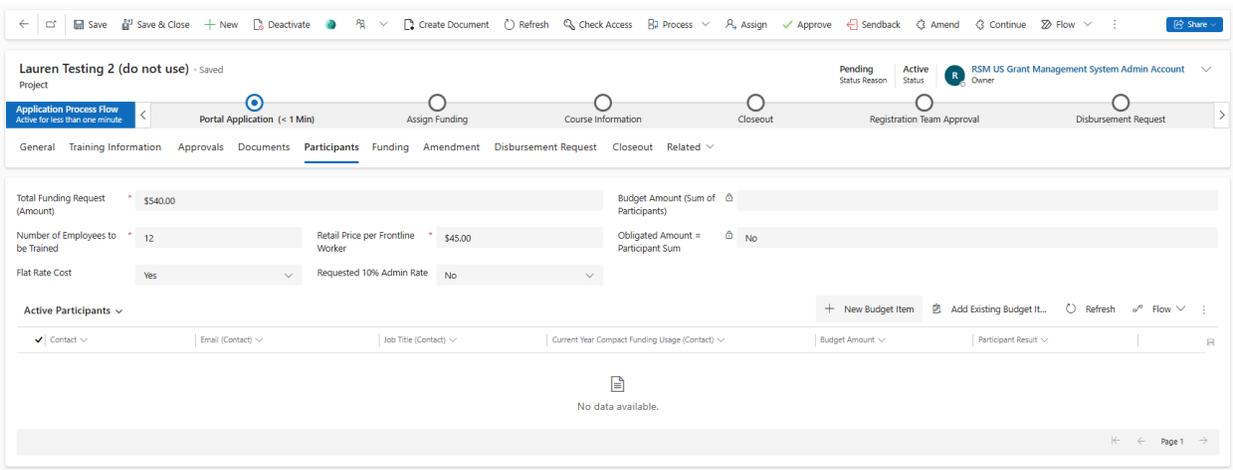
You can do this in one of two ways: upload the Participant Upload Excel template on the **'Documents'** or manually add Participants on the grid on the **'Participants'** tab.

Upload:



It will take a few moments for the Participants to show in the grid on the **'Participants'** tab with upload.

Manually enter participants:



A new screen will open for you to add the Participant:

The screenshot shows a 'New Budget Item' form with a 'General' tab. The form contains the following fields:

- First Name (required)
- Last Name (required)
- Alternative First Name
- Suffix
- Email (required)
- Job Title (required)
- Contact (lookup field)
- Date of Birth
- Budget Amount
- Participant Result (dropdown)
- Amendment Request (dropdown, currently set to 'No')

If you know the participant is already a contact in the system, you can populate them in the **‘Contact’** lookup field – you do not need to enter anything else. **‘Save & Close’** the record.

If the participant is not already in the system, enter their **First Name, Last Name, Email,** and **Job Title.** Leave everything else blank.

In both cases, you do not need to populate the budget amount. This will populate once you **‘Save & Close’** the record.

*Repeat this process as needed.*

You are now brought back to the Participants tab where you can view the participants for the training.

### Compact Member to complete Attestation

At this time, you have completed the necessary steps for this Application Contact to now go into the system and complete the attestation. You can let the **Application Contact** know that they can now login into the Upskill Maine portal and **‘Edit’** the funding request.

If you know they have not logged into the system before, you will need to send them an **‘Invitation’**. You can do this by going to their Contact record, and clicking **‘Create Invitation’**:

The screenshot shows a contact record for Lauren Polte. The contact is saved. The 'Home Address' field is visible. A dropdown menu is open on the right side, showing options: Assign, Assign Success Plan, Delete, Create Invitation, Activate Portal User Account, and Change Password.

A new window will open. All you need to do is click **‘Save & Close’**. This will send them an email to join the portal. The email is coming from **“MCCS No Reply - Alfond Workforce Grants [mccsno-reply-alfondworkforcegrants@mainecc.edu](mailto:mccsno-reply-alfondworkforcegrants@mainecc.edu)”** and the subject is **“You have been added to Upskill Maine”**

Once they are in the portal, they will need to navigate to the **‘Compact Member Funding Request’** page and scroll down to find the funding request you created for them and click **‘Edit’**.

Please Note: If you do not include the above information, it will delay processing your funding request. We have been receiving a high volume of submissions, which can cause delays in processing approval emails.

If you have any questions or concerns, please feel free to reach out to [alfondtraining@mccs.me.edu](mailto:alfondtraining@mccs.me.edu).

[Active Compact Member Funding Request-](#) [Apply for Funding](#)

Title	Organization	Contact	Start Date	End Date	Requested Amount	Approved Amount	Funding Status	Request Number	Created On ↑
Lauren Testing	Lauren Testing 2 (do not use)	Lauren Polte	2/28/2025	2/28/2025	\$540.00		1) Portal Application	11979	2/28/2025 3:50 PM

[Edit](#)  
[Withdraw Application](#)

Contact Us | [mccsalfondtraining@mainecc.edu](mailto:mccsalfondtraining@mainecc.edu) | 207.629.4000

Maine Community College System

They can review the information you entered for them and on the 'Attestation' step, they will need to select 'Yes' and click 'Submit'.

Once they have submitted, the application will move into the 'Assign Funding' stage and will be prompted for approval. No further action is need on your part if you are not a part of the **Application Approval Team**.

## VIII. Receiving a Funding Request in Upskill Maine GMS System

After a Funding Request has been created in the portal, you can find it in the Funding Requests page. Note: if someone began the request on the portal, but hasn't submitted yet, then it will have the Status Reason = Pending. Once they have submitted it, Status Reason = Submitted.

### Approvals

Different teams have approvals they need to approve to move the application along. To see the approvals, click on the 'Approvals' tab on the application

The screenshot shows the 'Approvals' tab for a funding request titled 'Visible Emissino Training and Certificat - Gorham Sand & Gravel'. The application process flow is visible at the top, with stages: Portal Application (checked), Assign Funding (10 Min), Course Information, Closeout, Registration Team Approval, and Disbursement Request. Below the flow, there is a table of approvals.

Approval Type	Owner	Approver	Date Approved	Status Reason	Send Back Reason
Assign Funding	Application Approval Team			Ready for Approval	
Closeout	Portals-Upskill Maine			Pending	
Course Information	Jennifer L Cormier			Pending	
Disbursement Request	Registration Team			Pending	
Registration Team Approval	Registration Team			Pending	
Portal Application	Portals-Upskill Maine	Portals-Upskill Maine	2/28/2025	Approved	

When a Funding Request is submitted through the portal, the 'Portal Application' approval is automatically approved, and the application is moved into the 'Assign Funding' stage.

If you are not a part of the **Application Approval Team**, you cannot take any action on a submitted funding request. The **Application Approval Team** is Charlie, Chris, Jennifer, Josh, Michelle H.

# Application Approval Team

## Verify all attendees have available funding

You can view this at the 'Current Year Compact Funding Usage':

The screenshot shows the 'Assign Funding' step of the application process. The 'Active Participants' table is highlighted with a red box:

Contact	Email (Contact)	Job Title (Contact)	Current Year Compact Funding Usage (Contact)	Budget Amount	Participant Result
Jeff Tarantino	jefftarantino@gsg gravel.com	---	\$50.00	\$110.00	---
Darin Shaw	darinshaw@gsg gravel.com	Manager	---	\$110.00	---

## Verify the Compact Member has available funding:

The screenshot shows the 'Assign Funding' step with a red box highlighting the 'Current Year Compact Funding Usage' field:

Current Year Compact Funding Usage: \$0.00  
Last updated: 2/28/2025 4:13 PM  
Recalculate

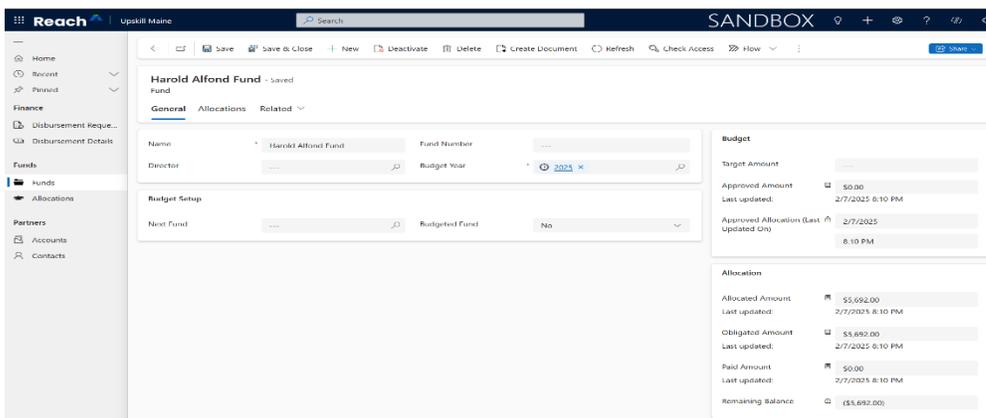
## Verify funding is available:

Click on the 'Fund' in the righthand section on the 'General' tab.

The screenshot shows the 'General' tab of the application process flow. The 'Fund' field is highlighted with a red box:

Fund: Harold Alford Fund

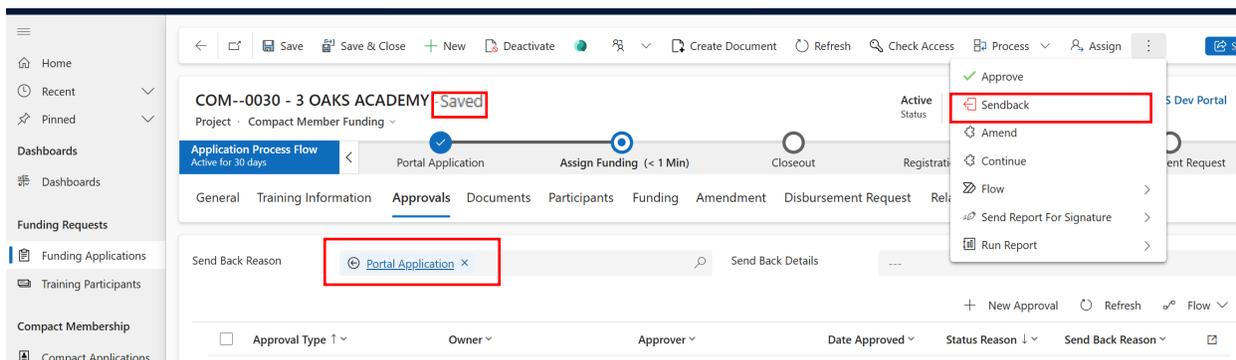
You will be directed to the fund source of the project and can view the funding available.



If the application is valid but there is no funding available, you will determine the next steps and coordinate manually with the applicant.

### **Send back for more information**

If there is any missing or invalid information before you assign funding, you can 'send back' the application to the application contact, which will re-open it for them on the portal. On the 'Approvals' tab, set the 'Send Back Reason' to 'Portal Application' and enter a reason in 'Send back Details'. Click 'Save'. Then, click the 'Sendback' button:



This will put the application back into the 'Portal Application' stage where the Application Contact will be able to edit the funding request and re-submit. Once they re-submit, the funding request will be moved into the 'Assign Funding' stage.

## Assign Funding and Approve

When you are ready to assign funding, you can enter the amount obligated for the request. You can do this in 2 places:

The screenshot shows the 'Assign Funding' step in a training application process. The interface includes a top ribbon with buttons like 'Approve', 'Sendback', 'Amend', and 'Continue'. The main form displays various fields for training details, including 'Organization', 'Training or Class Title', 'Start Date', and 'Amount Obligated'. A modal window is open for 'Assign Funding (23 Min)' with a red box around the 'Amount Obligated' field, which contains the text 'Provide a number'. Another red box highlights the 'Amount Obligated' field in the main form on the right. The top ribbon has a red box around the 'Approve' button.

Once the amount is set, you can click '**Approve**' in the top ribbon.

Once the funding is assigned, an '**Allocation**' record for the Project will be created against the Fund source. You can view this under the '**Funding**' tab.

## Approving Amendment Requests

You can view which Funding Requests have pending Amendments under the '**Active Amendment Requests**' view on Funding Applications. You can open the record from there and it will take you to the Funding Request record. Click on '**Amendments**'. This will show the updates the Compact Member requests. You can approve all the requests by checking the '**Approve all Amendment Requests**' checkbox and saving the record, or by manually clicking into the participants updating them.

## External Training Closeouts

When a Compact Member has completed their closeout process on the portal, you will be able to see the participant results in the grid on the '**Participants**' tab. Once you have confirmed the participant results are in the system, you can Approve the closeout step/approval.

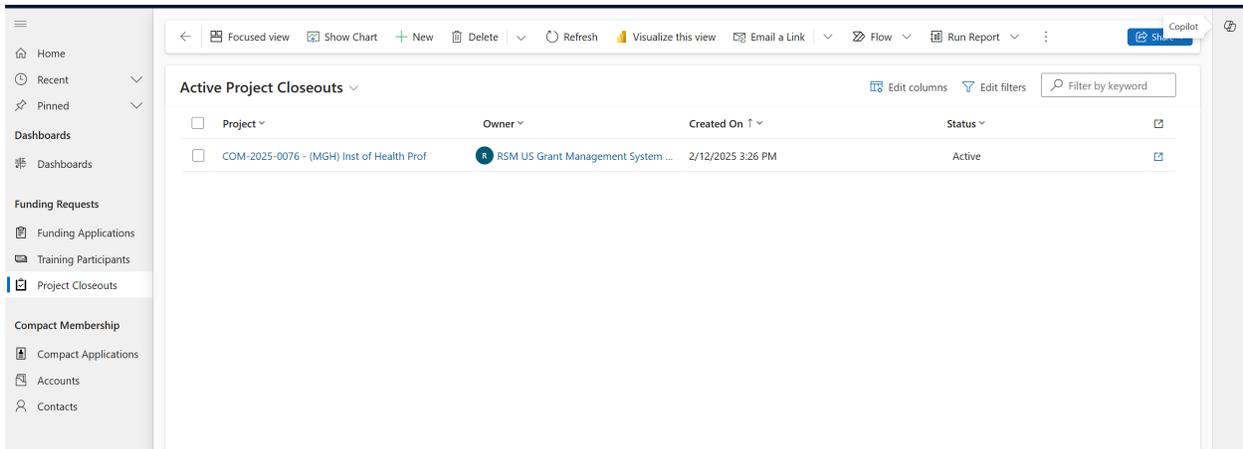
## College Training Closeouts

For trainings conducted by the community colleges, their closeout process will take place in the Upskill Maine GMS system.

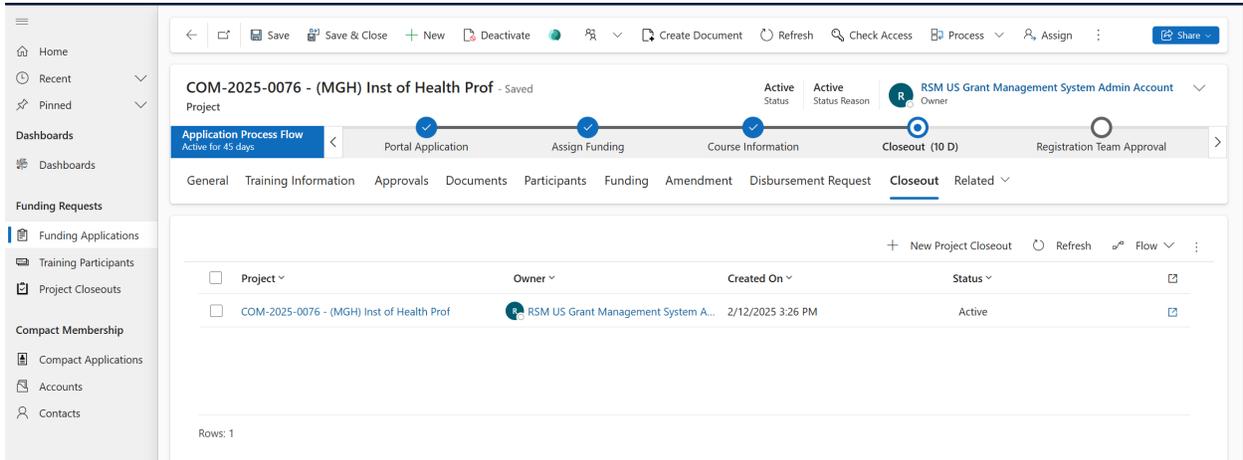
There is automation in place to check daily if a funding request with a Maine Community College System Campus has a training where the end date has passed, and it is currently in the Closeout approval step.

If a funding request meets these criteria, a '**Project Closeout**' record will be created for them. You can view this on the '**Active Project Closeout**' view:

*(Note: there are separate project closeout views by college as well)*

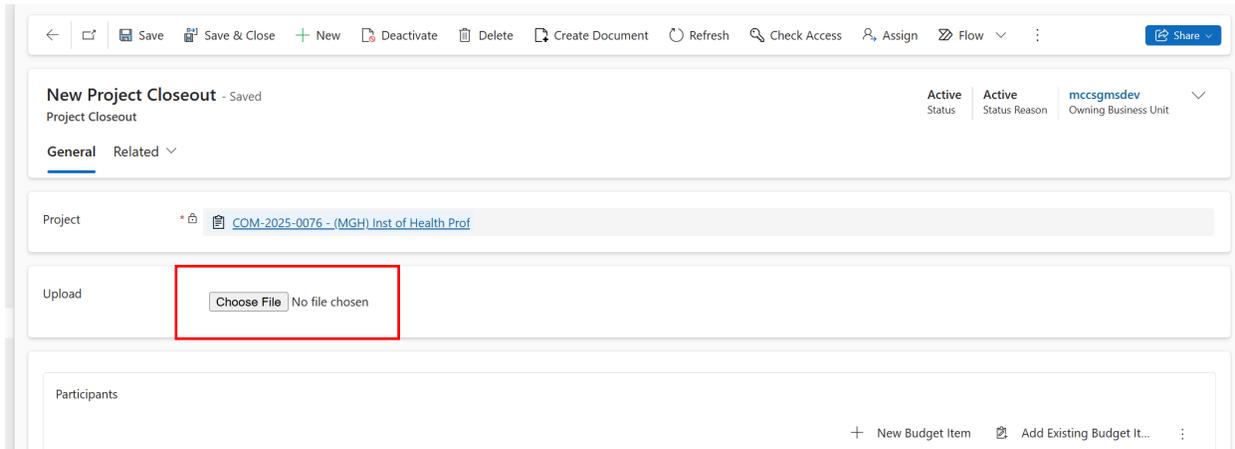


Or on the Funding Request record under the **'Closeout'** tab:

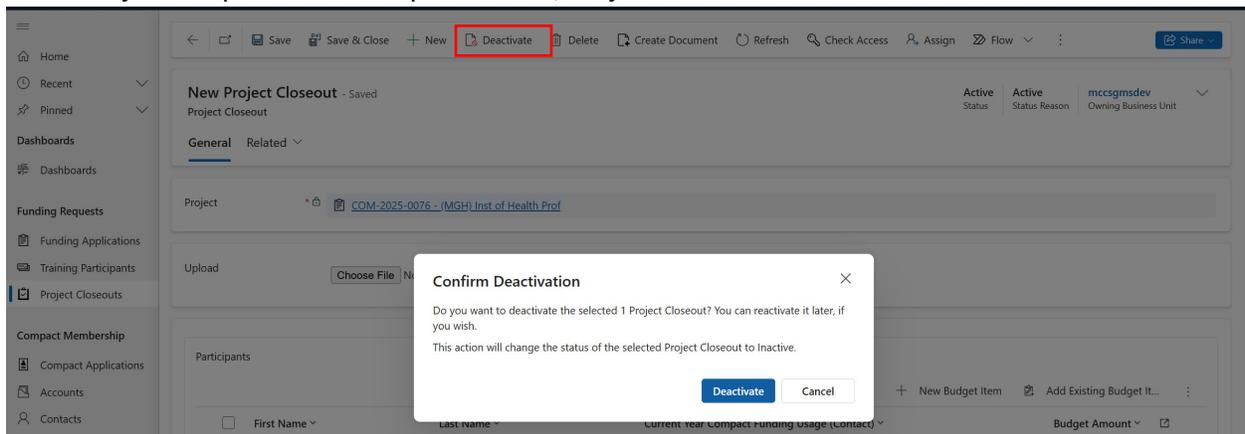


The action needed from the College is to upload the spreadsheet of results:

They can also view the list of participants from the training here as well.



Once they have uploaded their spreadsheet, they will need to **deactivate** the record:



Once they have deactivated the record, no further action is needed from them. Automation will run to approve the '**Closeout**' step on the funding request moving it to the '**Registration Team Approval**' stage.