Upskill Maine – Documentation

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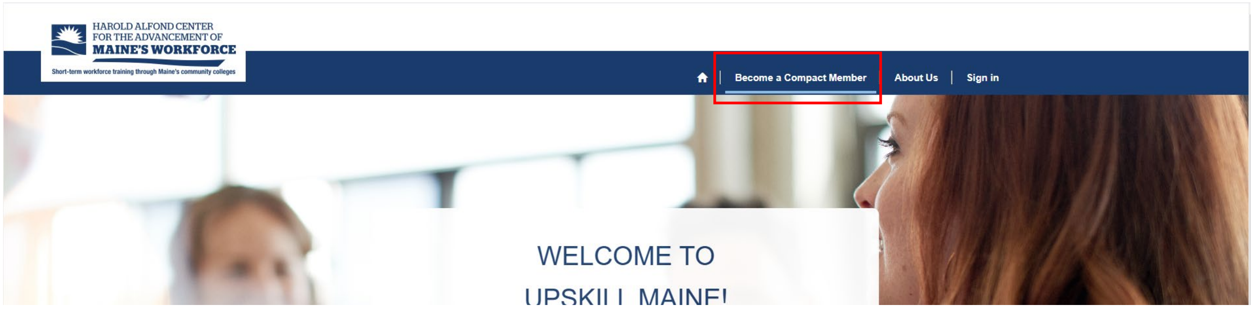
I. Create a Compact Membership Application in Upskill Maine Portal

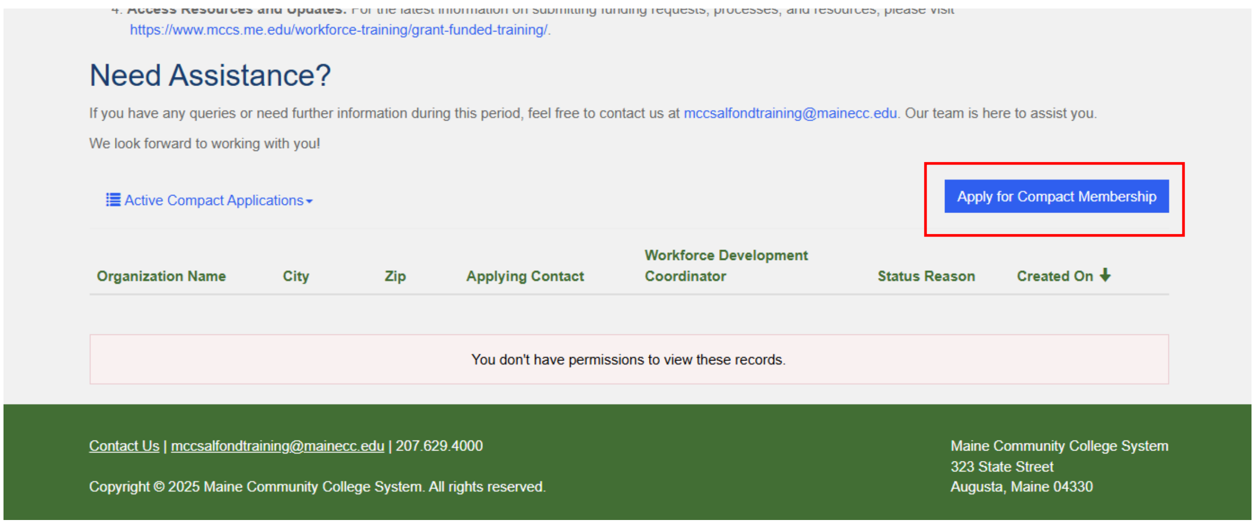
Beginning an application

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

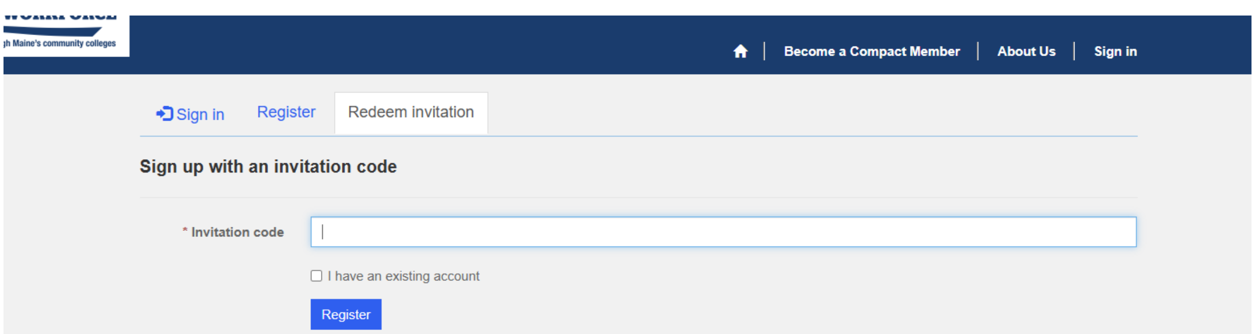
Click on '**Become a Compact Member**' in the header:



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**':

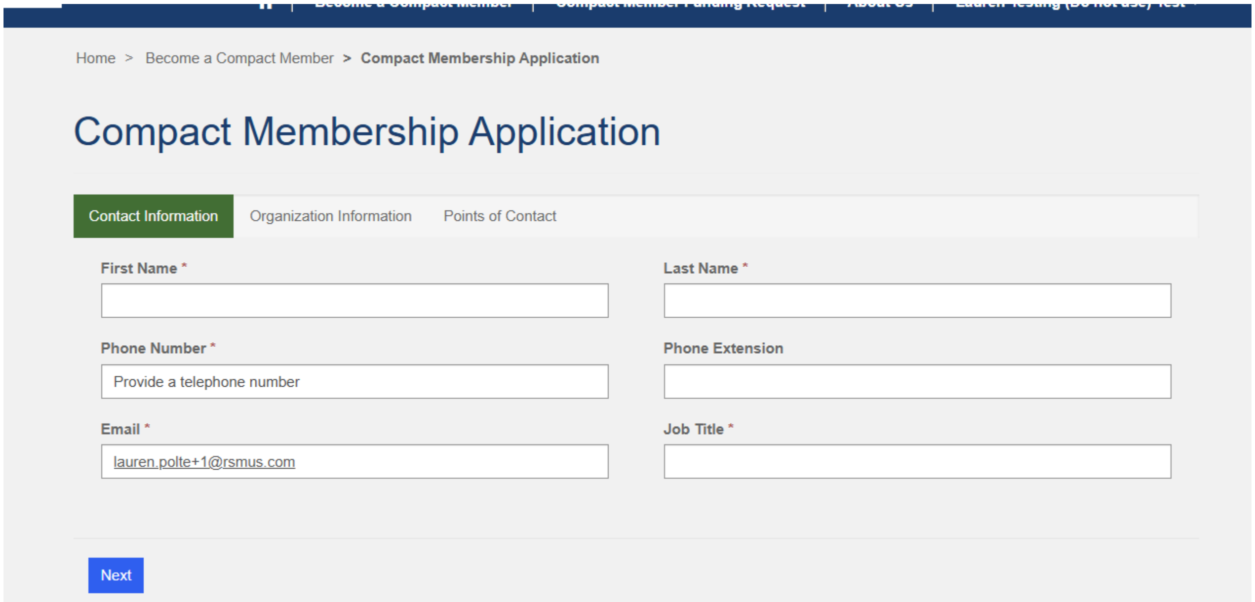


The system will prompt you to register for the Upskill Maine Portal. If you received a portal invitation, you could redeem that here by pasting the link, or by following the instructions from the email and then apply. If you did not receive a portal invitation, you can enter your information on the '**Register**'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



Contact Information

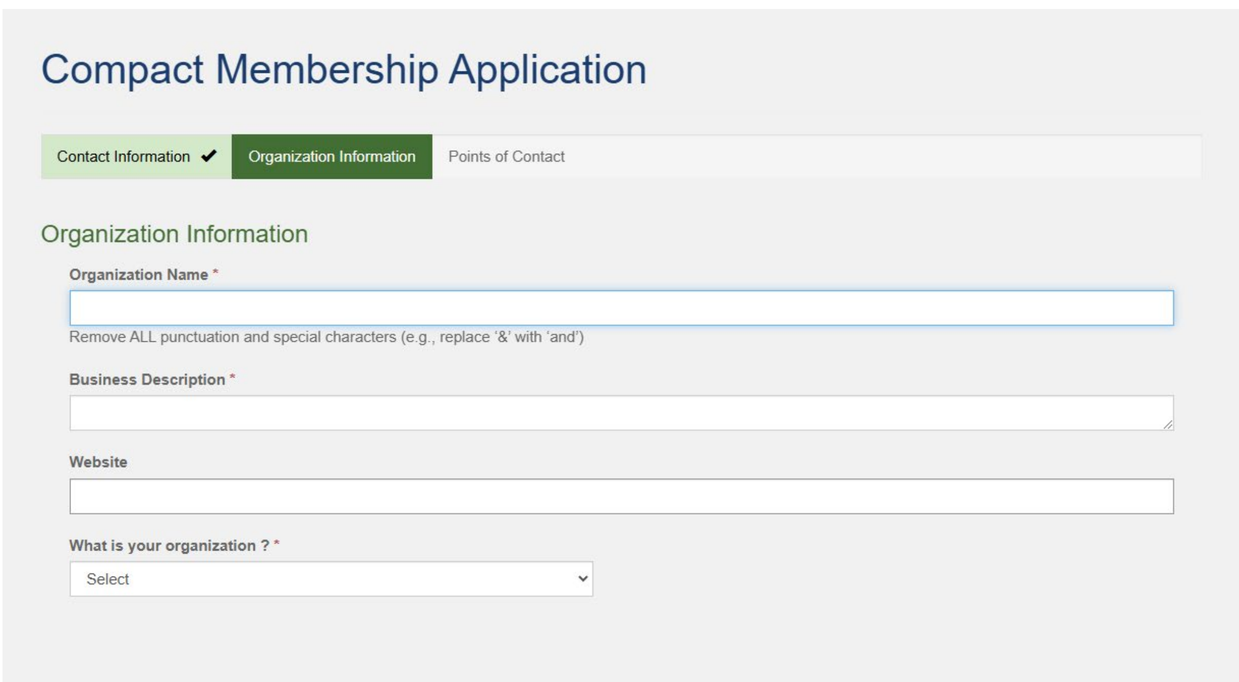
Once you register, you will be brought to the first page of the application; you will see Contact Information for the applicant (you).



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

Organization Information

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



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

Functionalities to note:

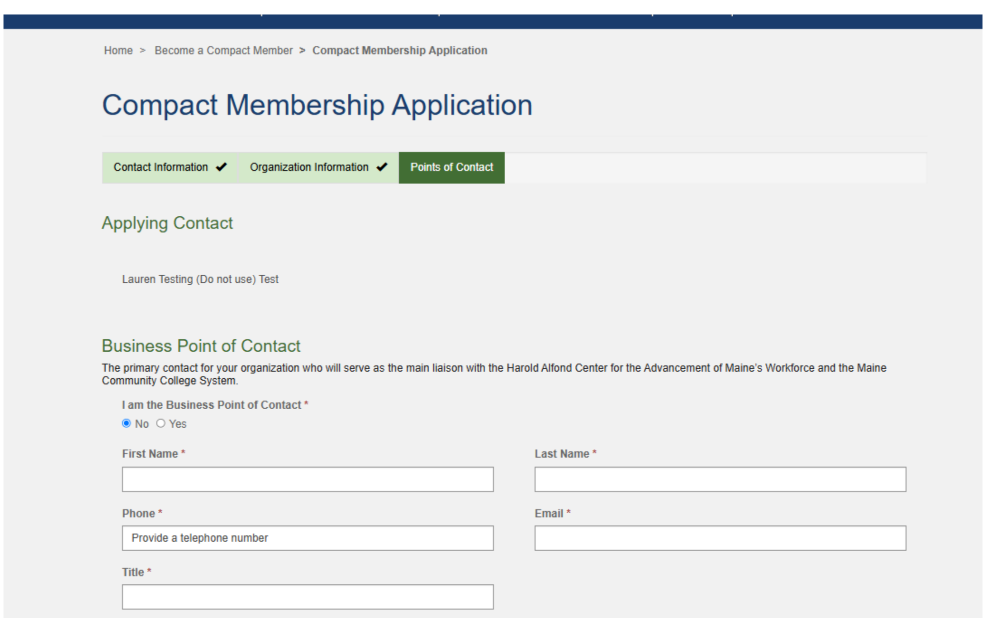
- **"What is your organization? →**
    - Business/Municipality
        - **"Are you a sole proprietor or business?"**
            - Sole Proprietor → Enter **SSN**
            - Business → Enter **EIN**
        - Enter "**Number of full-time employees**"
        - Enter "**Number of part-time employees**"
        - Enter "**Number of seasonal employees**"
    - Non-profit
        - Enter **EIN**
        - Enter "**Number of full-time employees**"
        - Enter "**Number of part-time employees**"
        - Enter "**Number of seasonal employees**"
        -
    - 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.



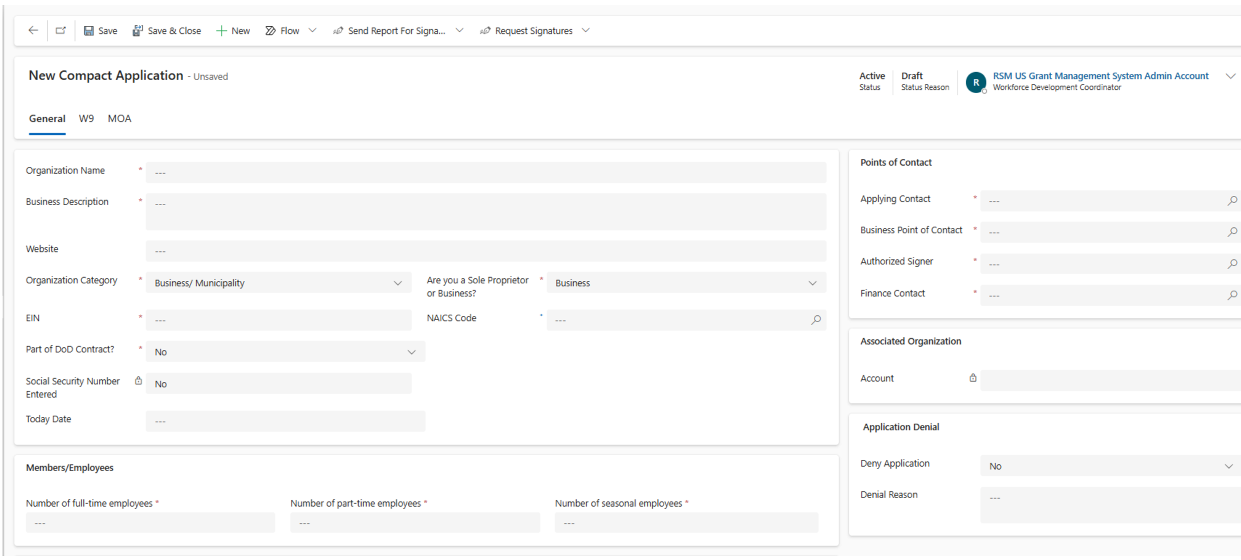
Once you have entered the applicable information, upload your W9. You will not be able to submit your application until you upload a W9.

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

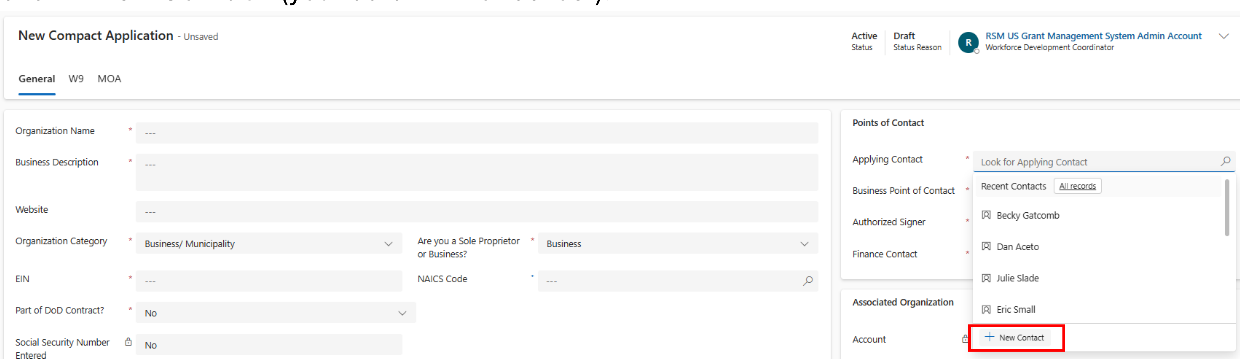
II. Create a Compact Membership Application in Upskill Maine GMS System

Navigate to the Compact Applications section. Click ‘**+ New**’.

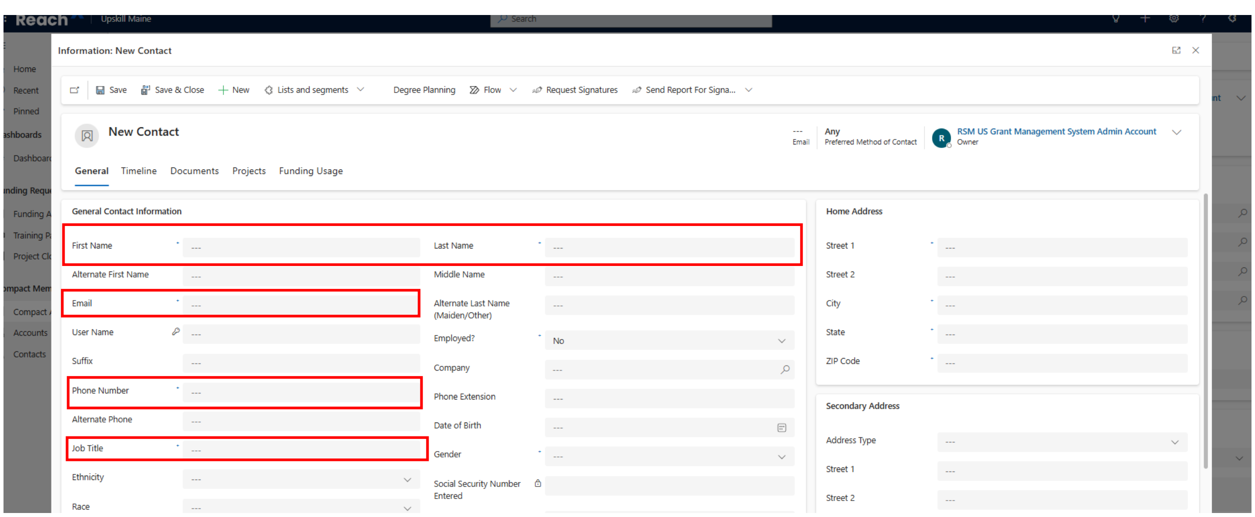
Enter required information



If you do not 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.**

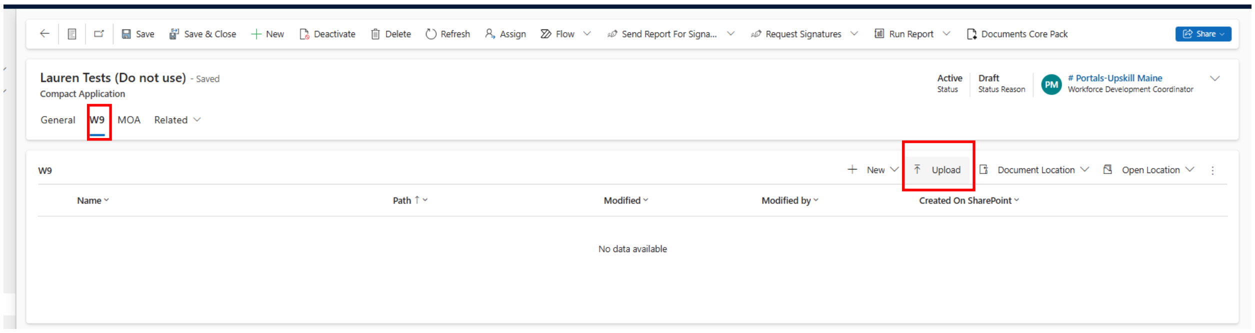


Once you have entered those 5 contact data points, click ‘**Save & Close**’. You should now see the contact you just created in the lookup. Below that, you can see their 5 data points displayed.

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.**

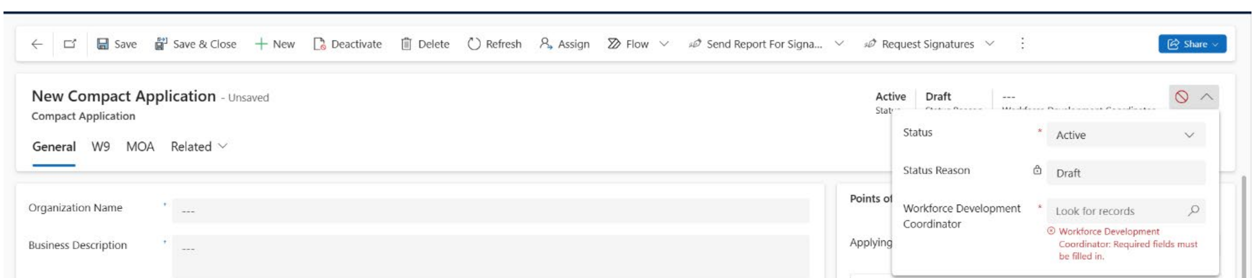
After you save the record, you now have the ability to upload the W9. This can be done on the ‘**W9**’ tab. *This functionality is not available until you have saved the record*.



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

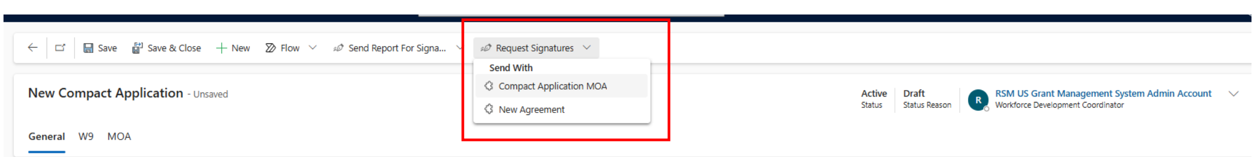
Assigning

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**’.

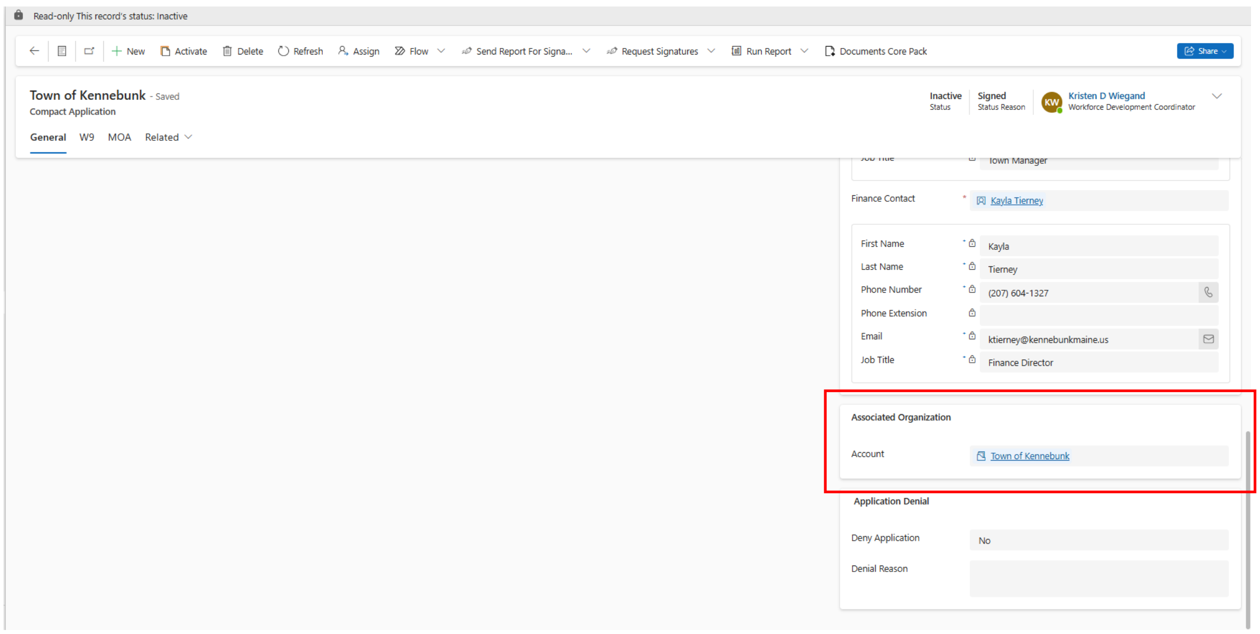
If you see your MOA is in ‘**DRAFT**’ status, something did not go correctly with sending the MOA. The most likely culprit is the ‘**Authorized Signer**’ field was not populated.

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.



On the newly created ‘**Account**’ record you will see:

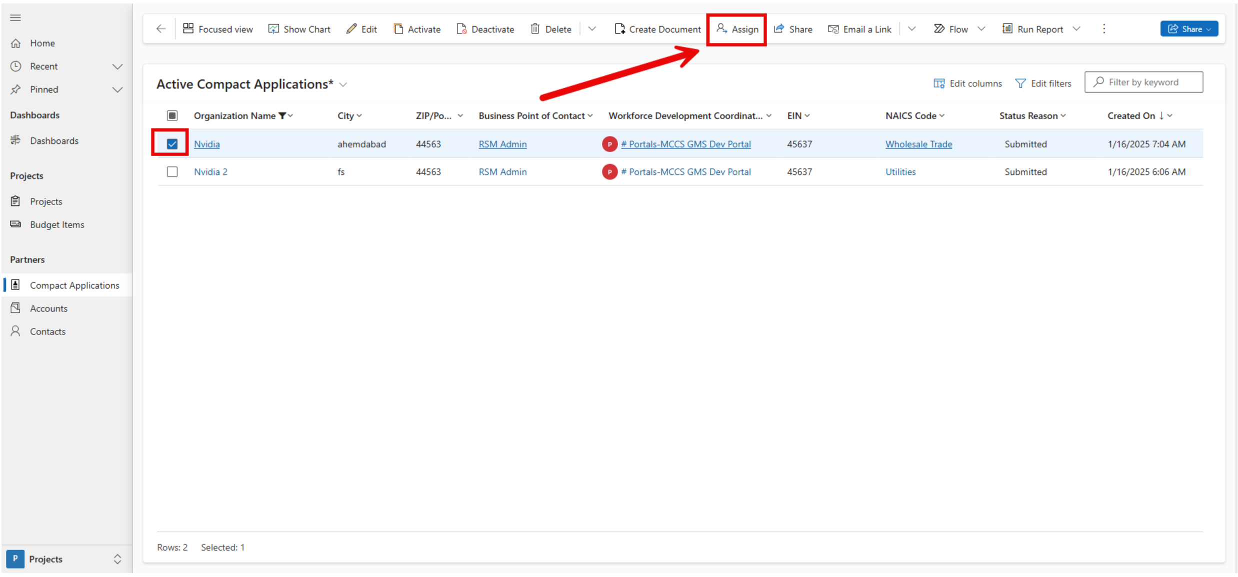
- Compact Membership status and start date, their Signed MOA and W9
- Connecting the Contacts created during the application as administrators on the new Account

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

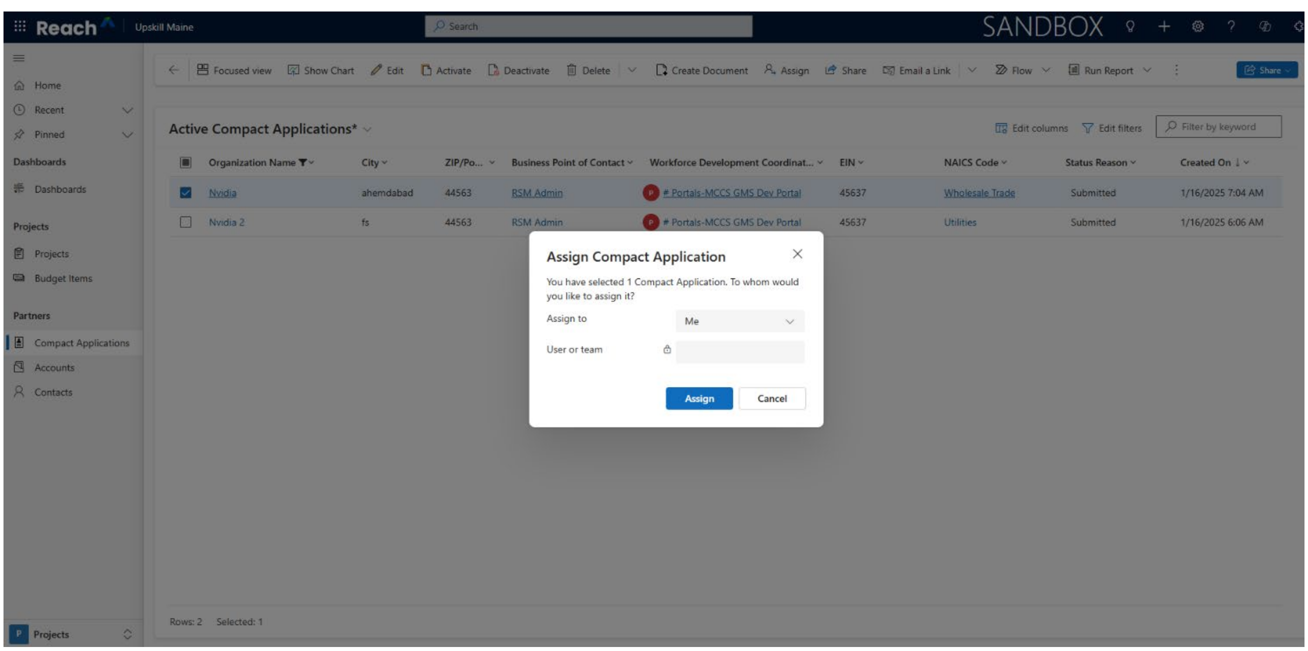
You can **assign each application** to yourself or the relevant **Workforce Development Coordinator** by checking the record(s) from the grid and then clicking **Assign**:



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.*

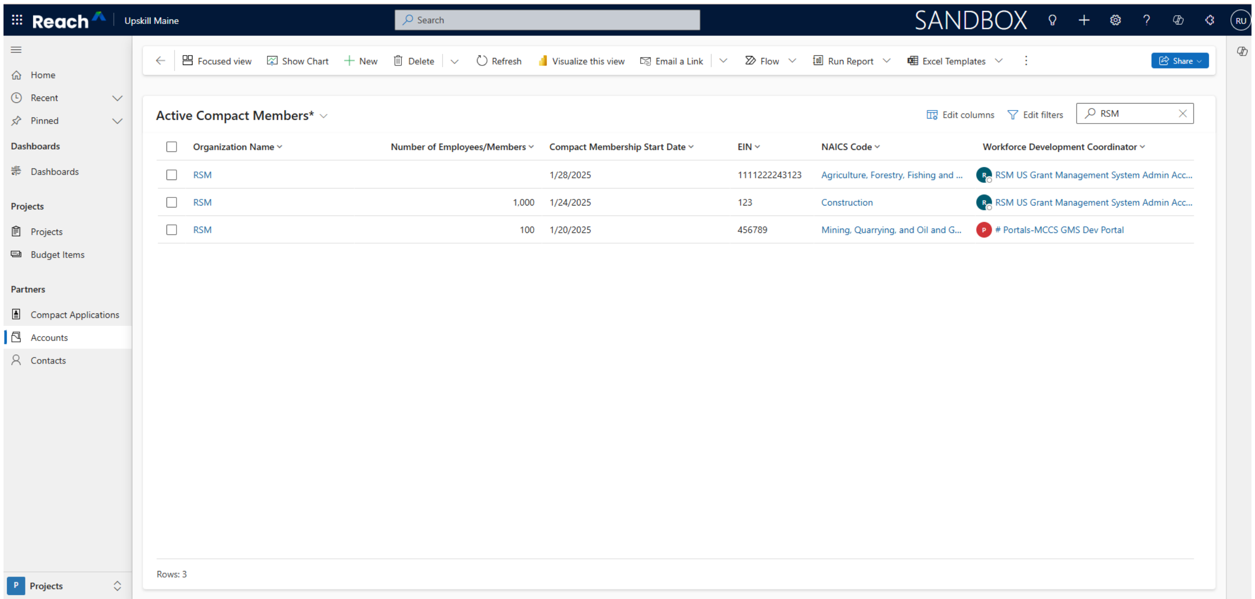
This sets the **Workforce Development Coordinator** on both the **Compact Application** and the **Account record** that gets created when it is approved. **If you don't assign the Compact Application before it is Approved, you will have to assign it on the Account that gets created afterwards.**

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.



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**:

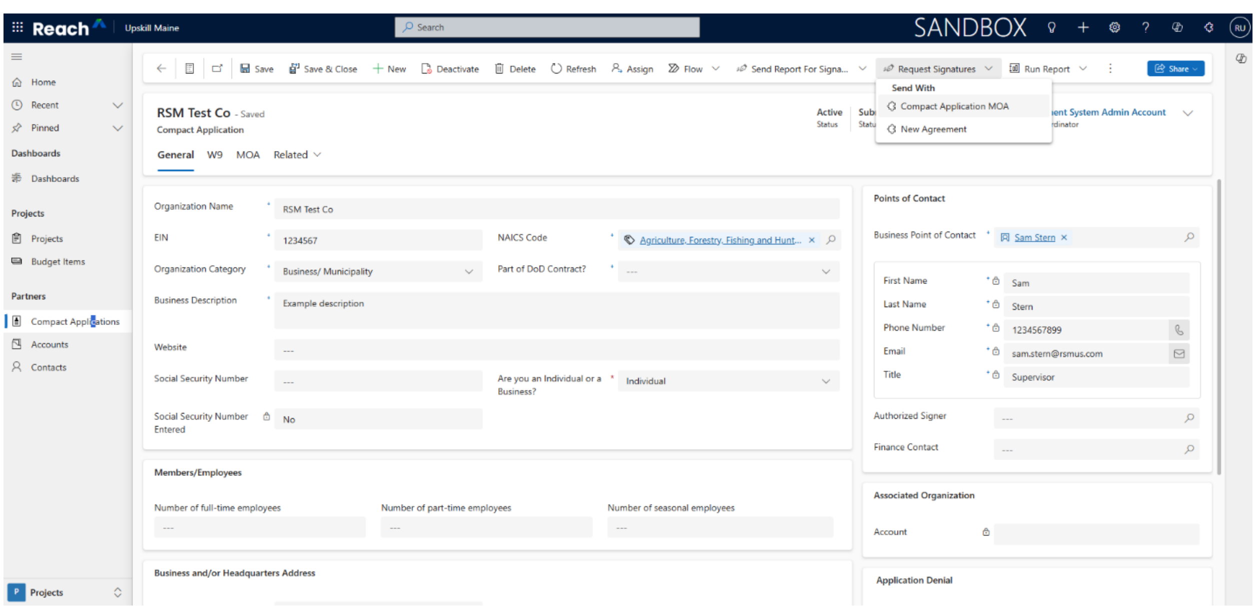


- **If you find a duplicate** that is **already a Compact Member**, then please reach out to the applicant to let them know that their **organization is already a member** and recommend that they contact the **Account's Primary Contact** to be added as an **Organization Admin** on the portal.
- **If 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".

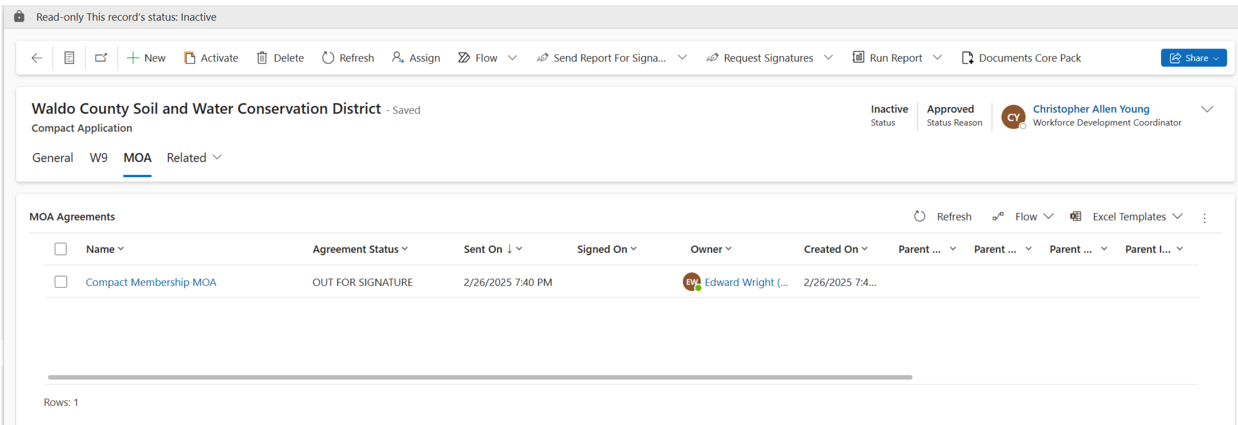


This will utilize the **Compact Membership MOA template** to generate an **Adobe Sign agreement** and dynamically populate the information entered by the applicant (or by you). **The recipient of the MOA will automatically be set to the Authorized Signer contact.**

- 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

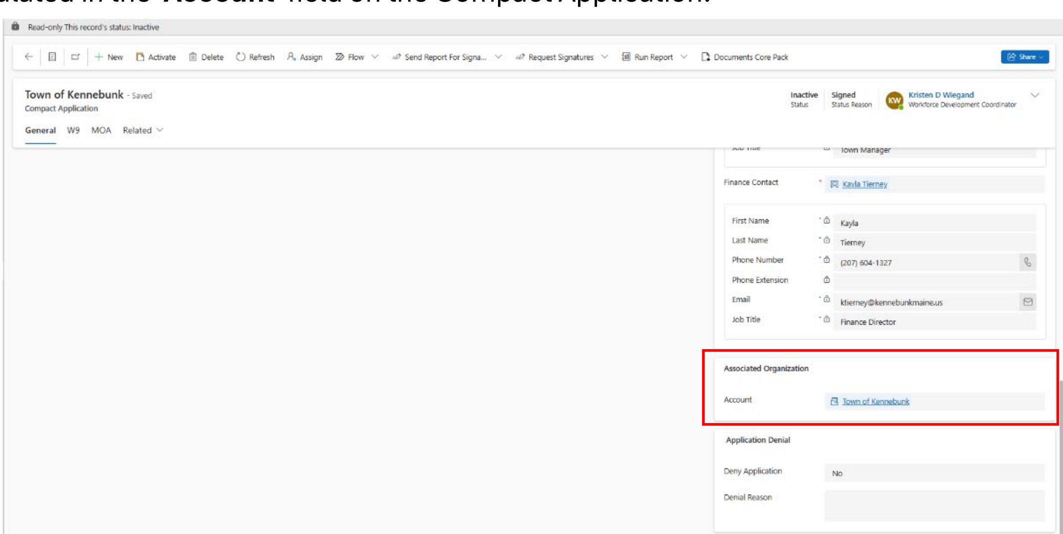


Once the **Authorized Signer has signed** the document, the MOA will come back into the system as '**SIGNED**'. This will trigger the automation to create the Compact Member record. The system will mark the **inactive Compact Application** as **"Signed"** after the automation has run. This may take a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



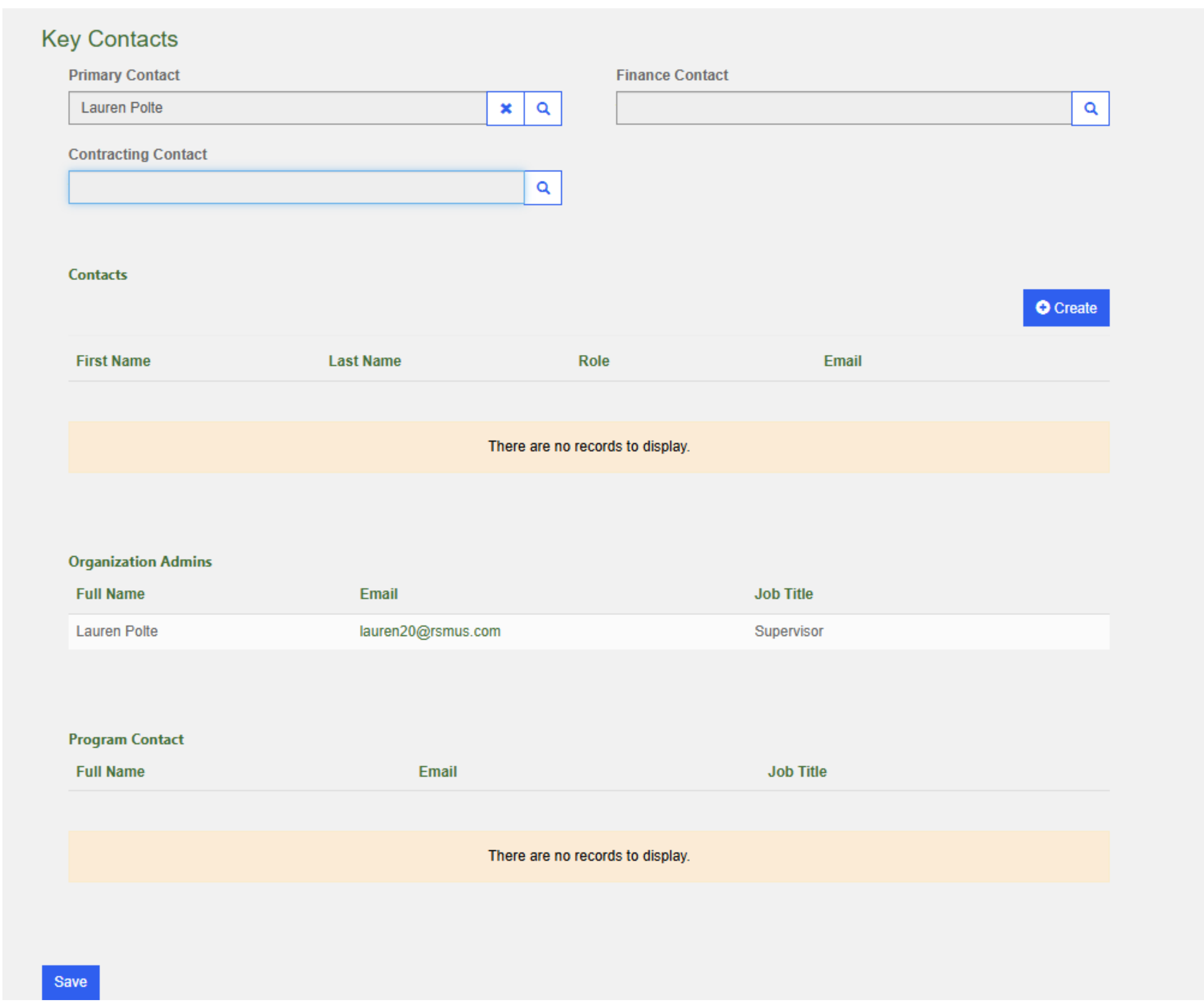
IV. Organization Management in Upskill Maine Portal

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.

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.

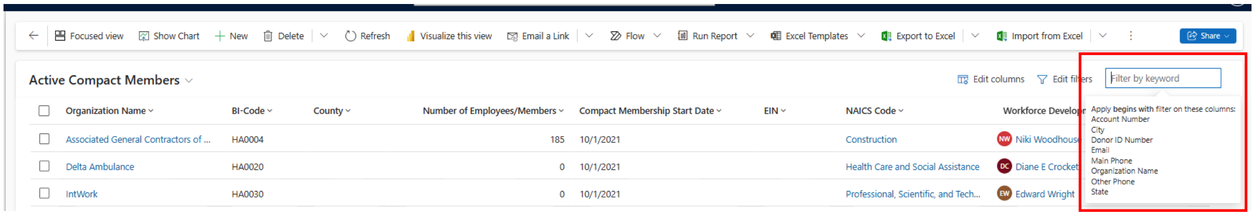
Here you can update any information needed, and give contacts with your organization permissions to submit funding requests:



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.

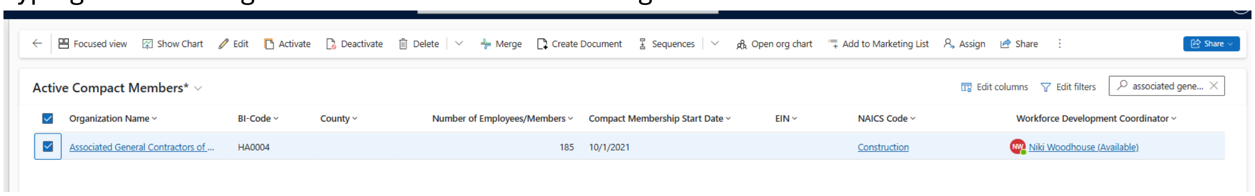
You can search by any of these values:



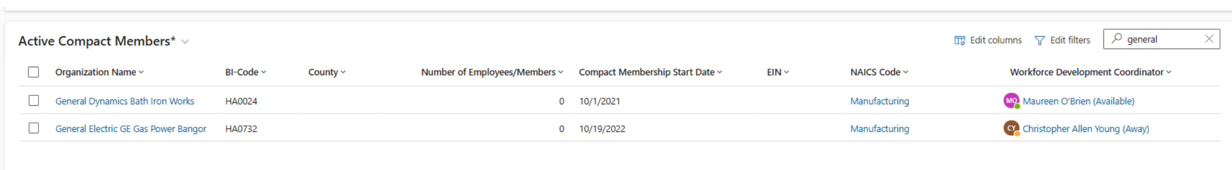
If you cannot find the record you are looking for, try putting an * in front of what you are typing in. This will allow you to search any part of any field in the columns.

For example:

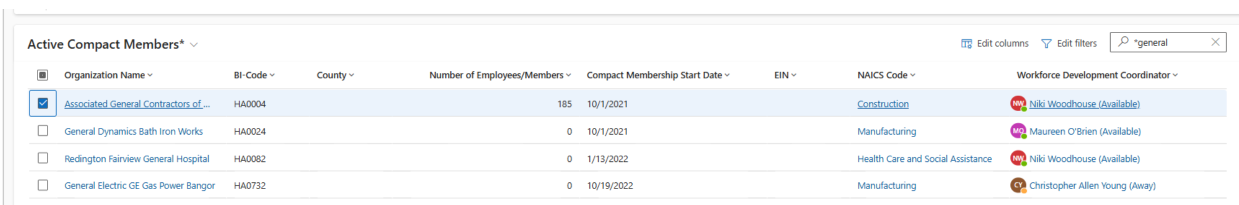
Typing 'associated general' finds the record that begins with that value:



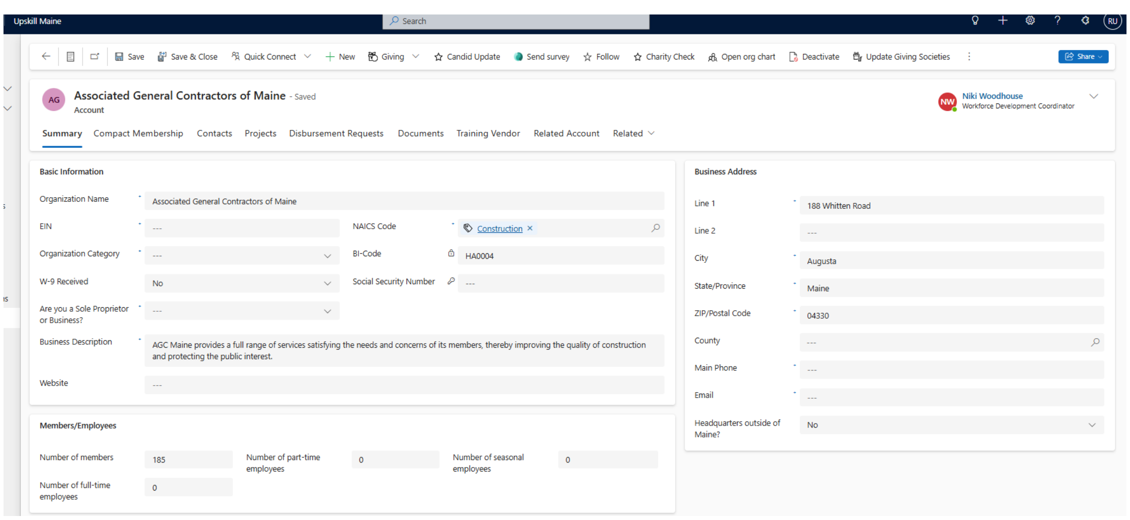
Typing 'general' does not show the record I am looking for:



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



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



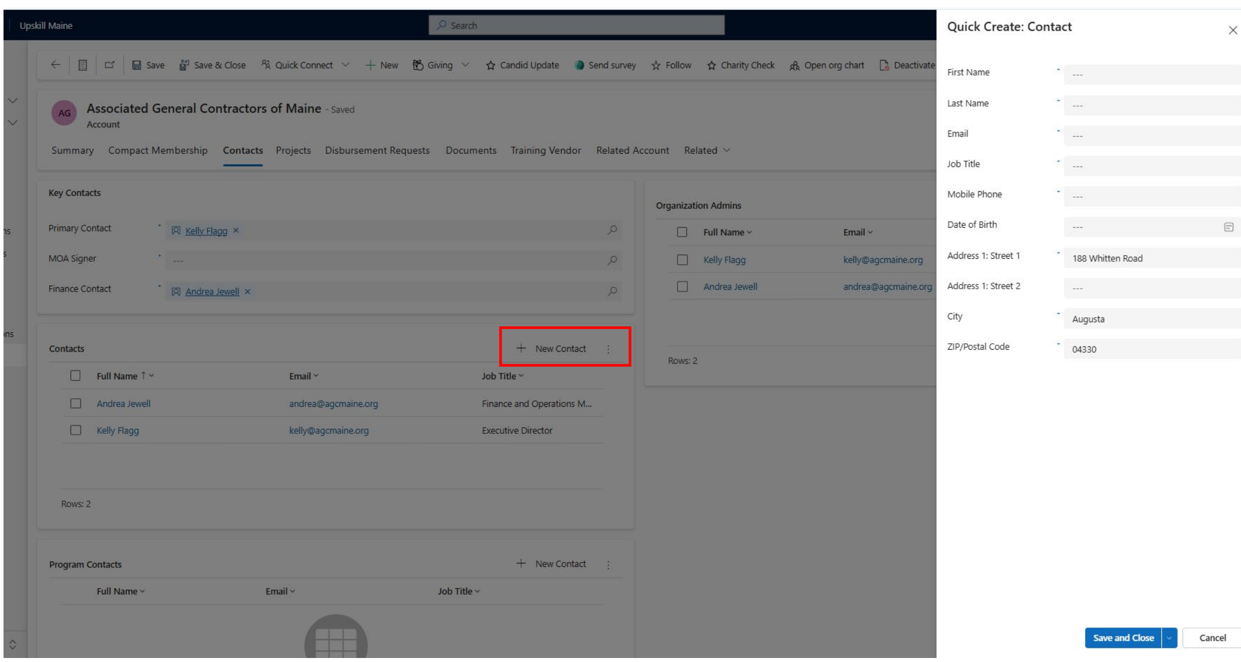
You can view information brought over from their Compact Membership Application. This includes:

- **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
    - 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

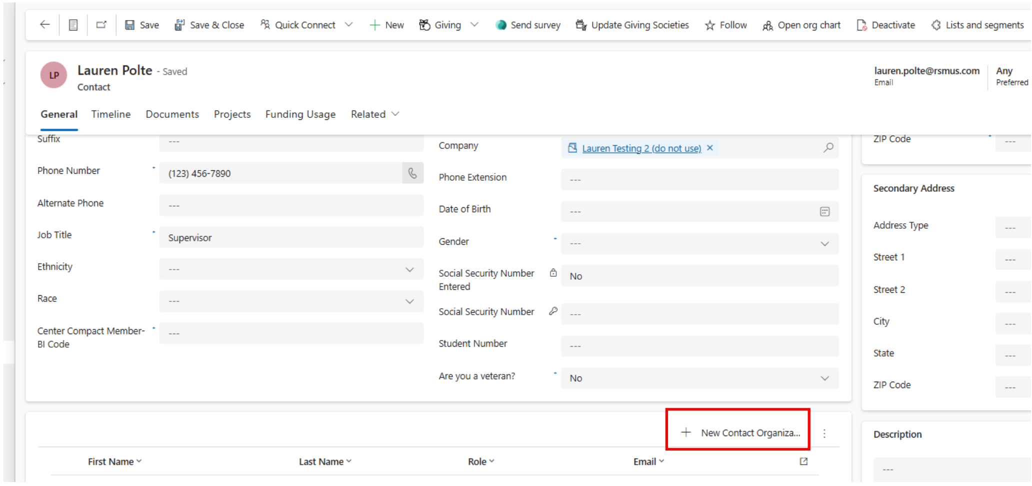
If you need to add a Contact that does not already exist to a Compact Member as an Organization Admin or Program Contact, click '**+ New Contact**' in the '**Contacts**' grid:

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.

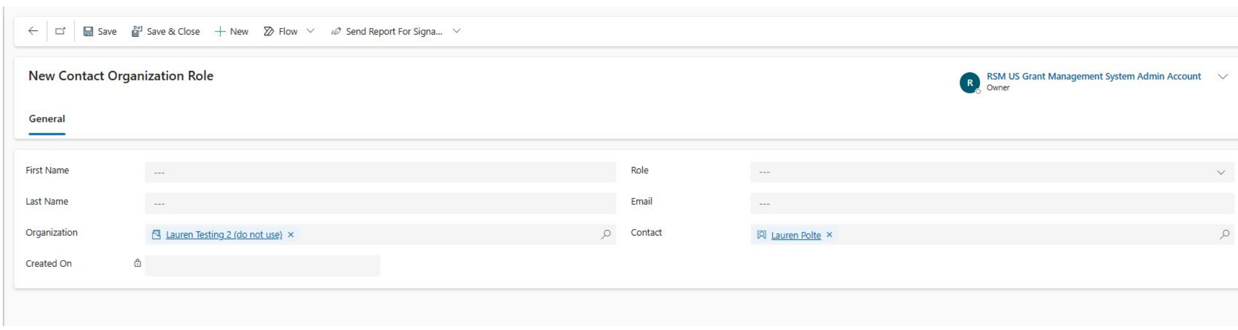


A pop-out will show to enter the contact information (The populated address is pulled from the Account address; you will need to update this). This will automatically relate the contact to the account.

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).



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**’

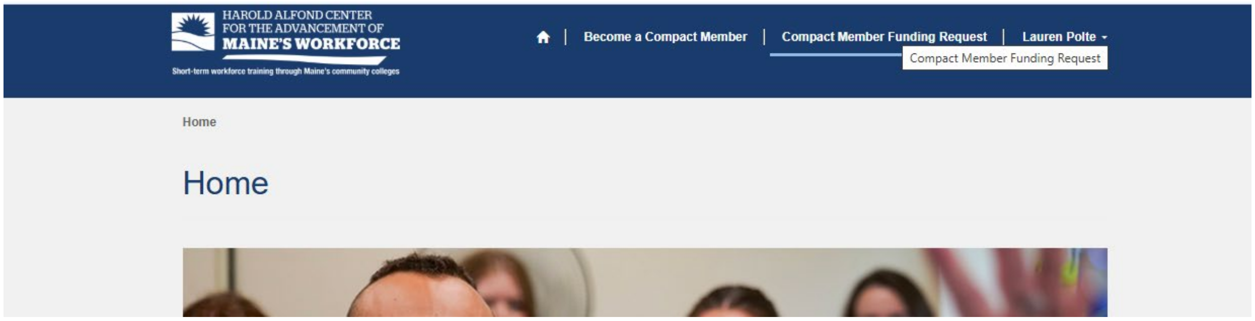
You will see the Contact Organization Role record you just created in the grid on the contact. Now, you can navigate back to the Account and see the Contact in the appropriate grid based on the permissions you gave them.

VI. Create a Funding Request in Upskill Maine Portal

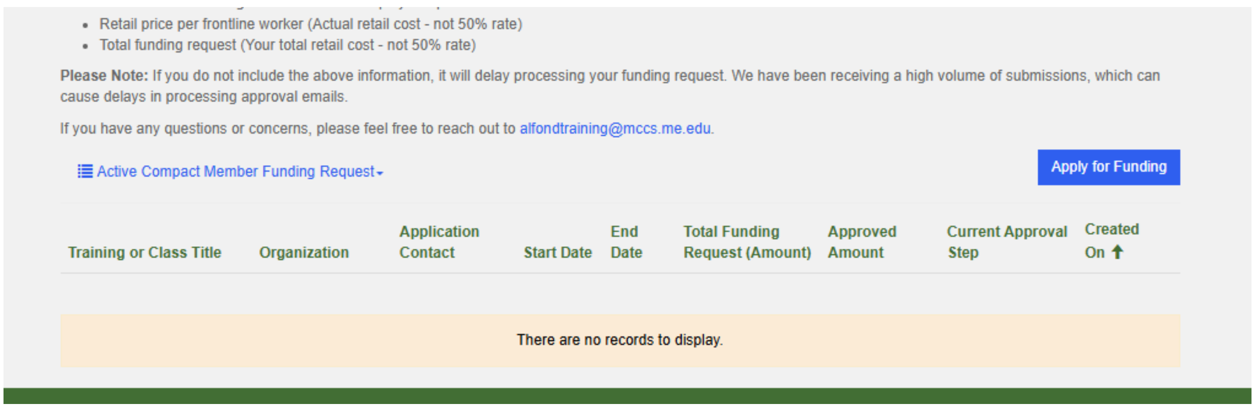
Beginning an application

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*):

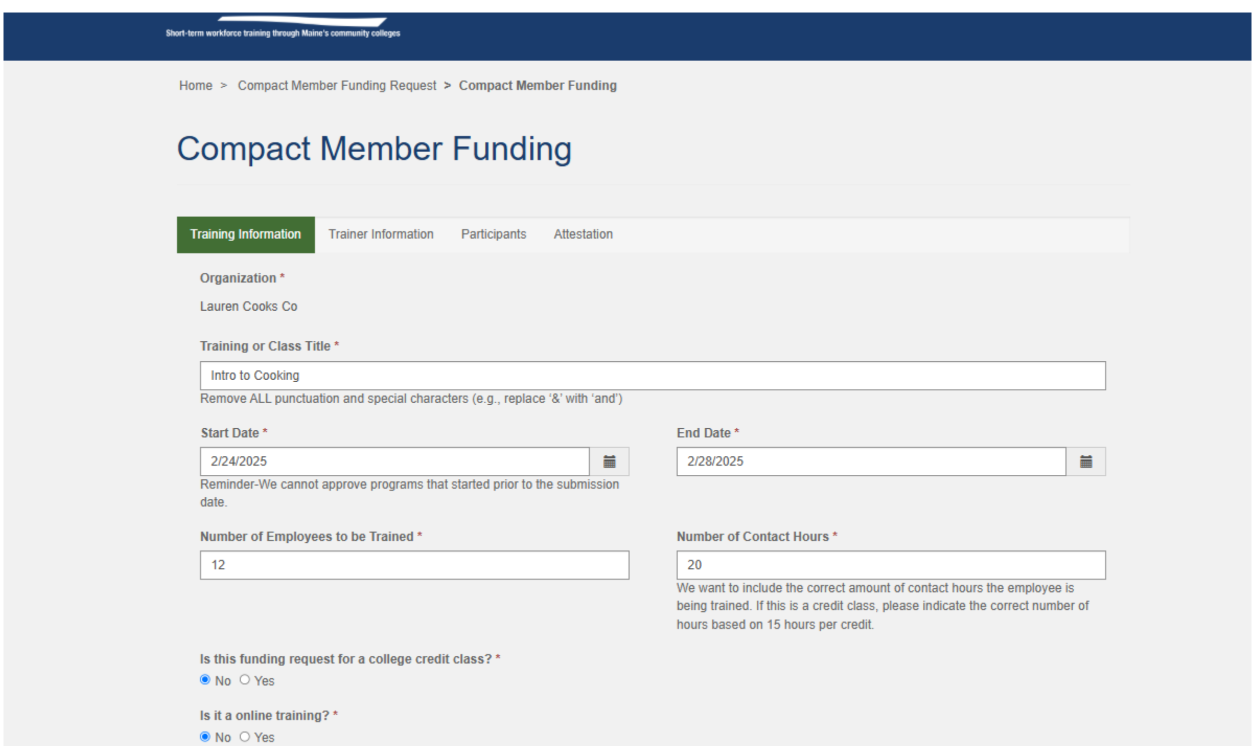


You will be brought to the 'Compact Member Funding Request' page. Scroll down to the bottom of the page, and you will see a grid of Funding Requests you have started or submitted for your organization. To submit a new Funding Request, click 'Apply for Funding':



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.

<u>**Functionalities to note:**</u>

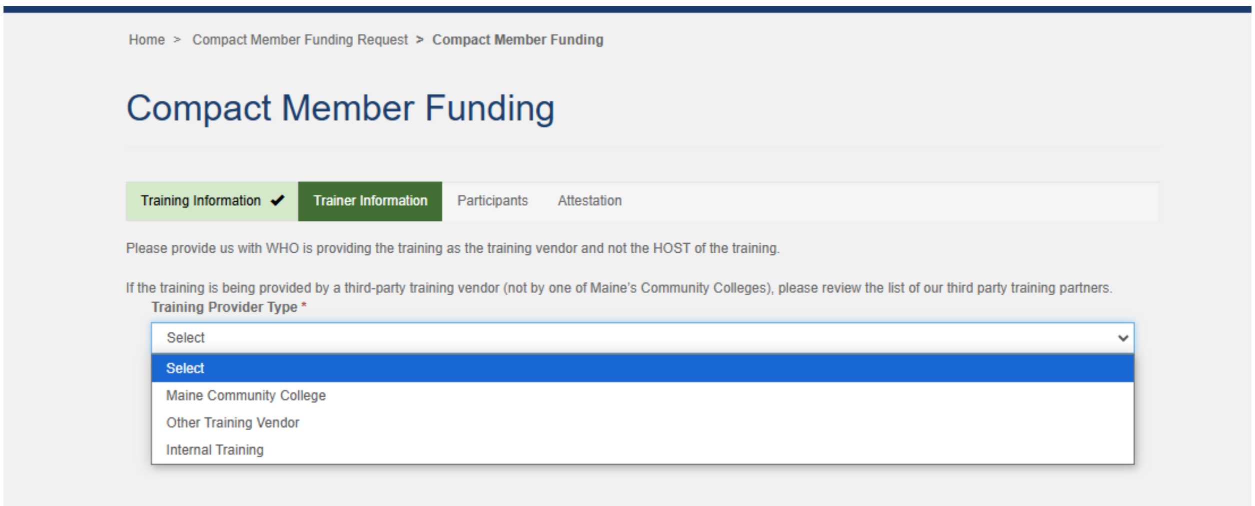
- "**Is it an online training?**" → "**Training Link**" field will show
- "**Is this funding request for a college credit class?**" → "**Number of Credits**" will show
- "**The training cost is at a flat rate regardless of number of attendees**"
    - If '**No**'
        - You will enter "**Number of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

After you entered the required information, click "**Next**".

Trainer Information

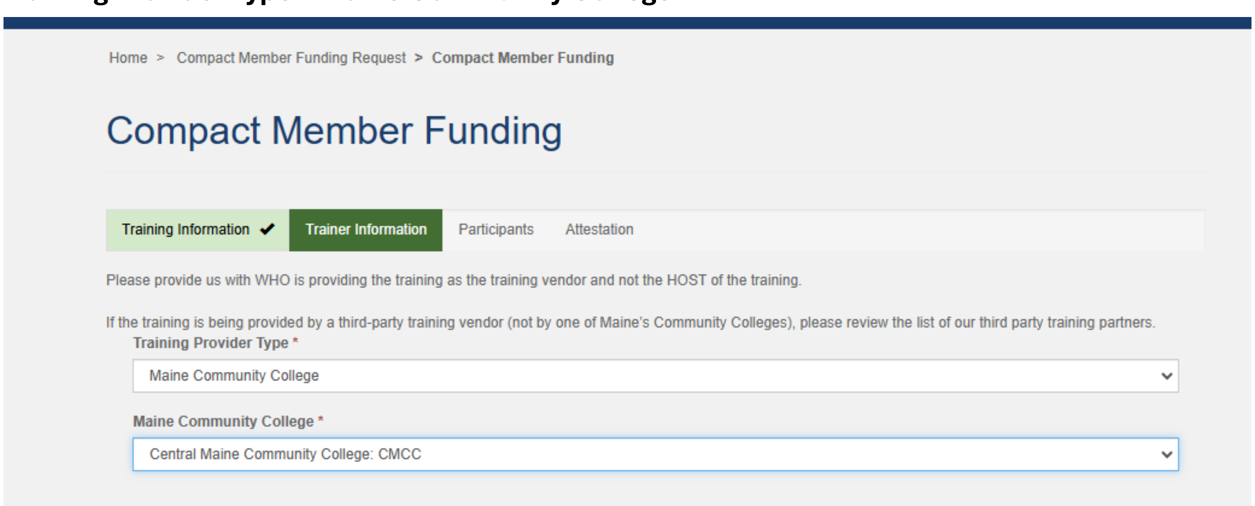
You are now on the '**Trainer Information**' page.

Select an option from the dropdown:

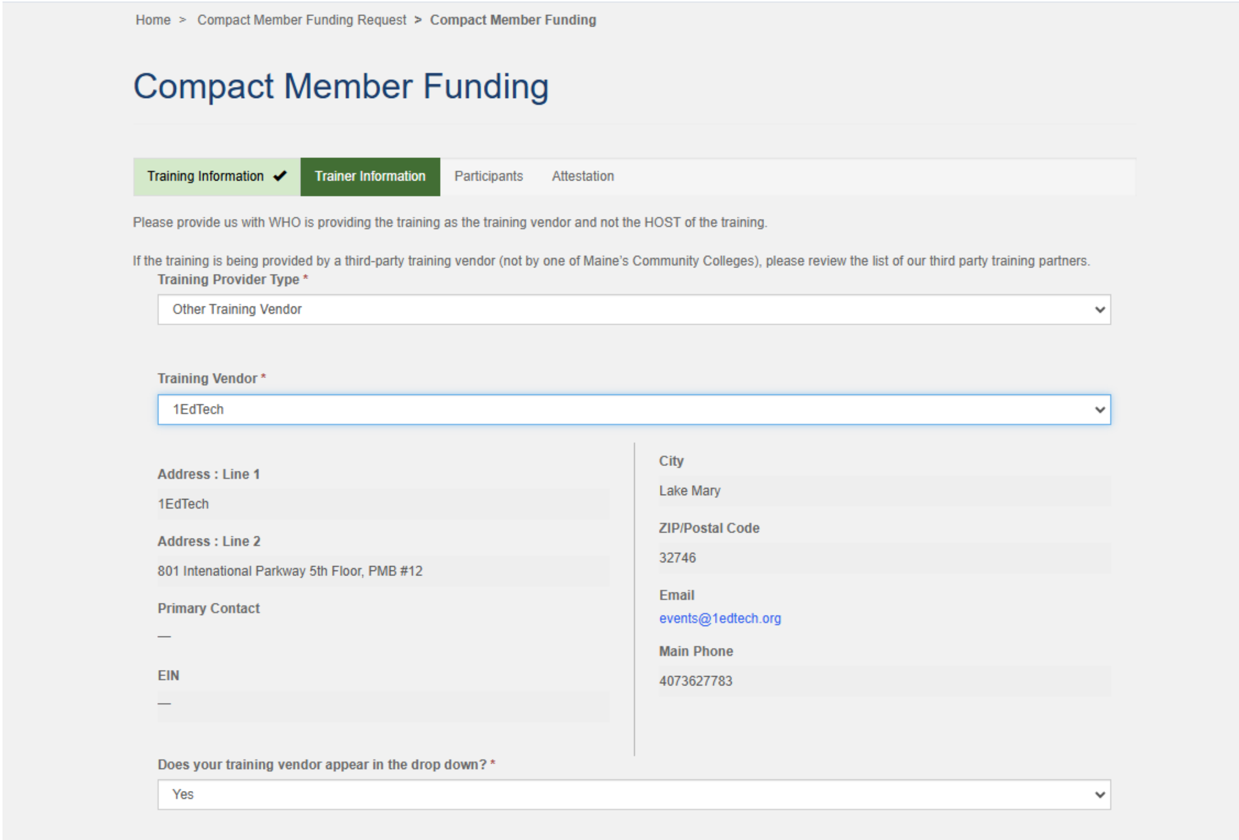


Based on your selection, more information will show for you to fill out:

Training Provider Type = Maine Community College

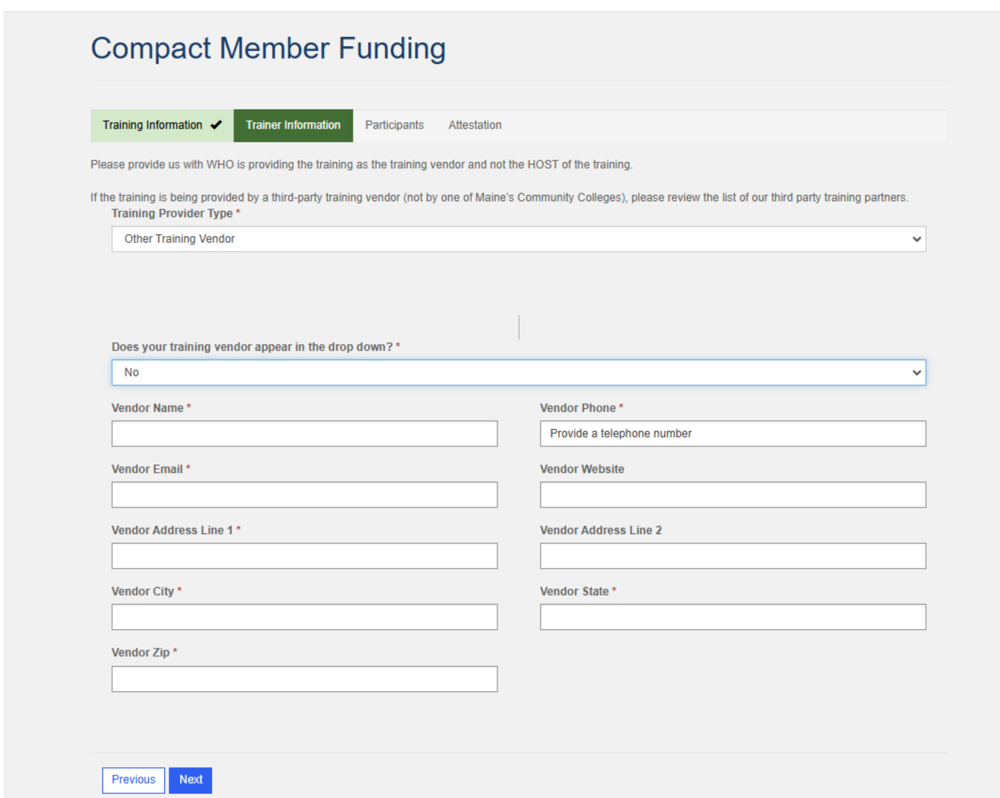


Other Training Vendor:



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

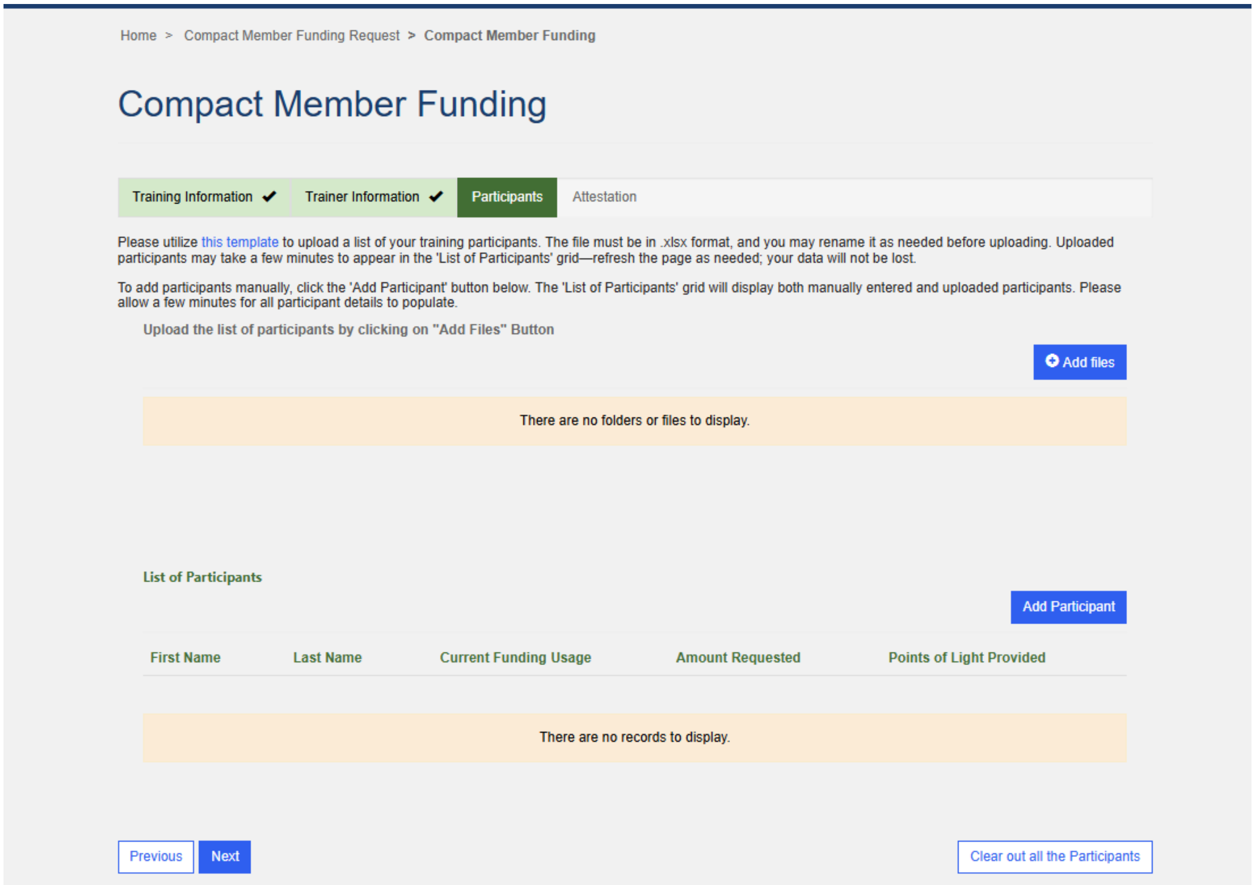
If you do not find the training vendor you are looking for in the dropdown list, change '**Does your training vendor appear in the drop down?**' to '**No**'. Enter the training vendor's information:



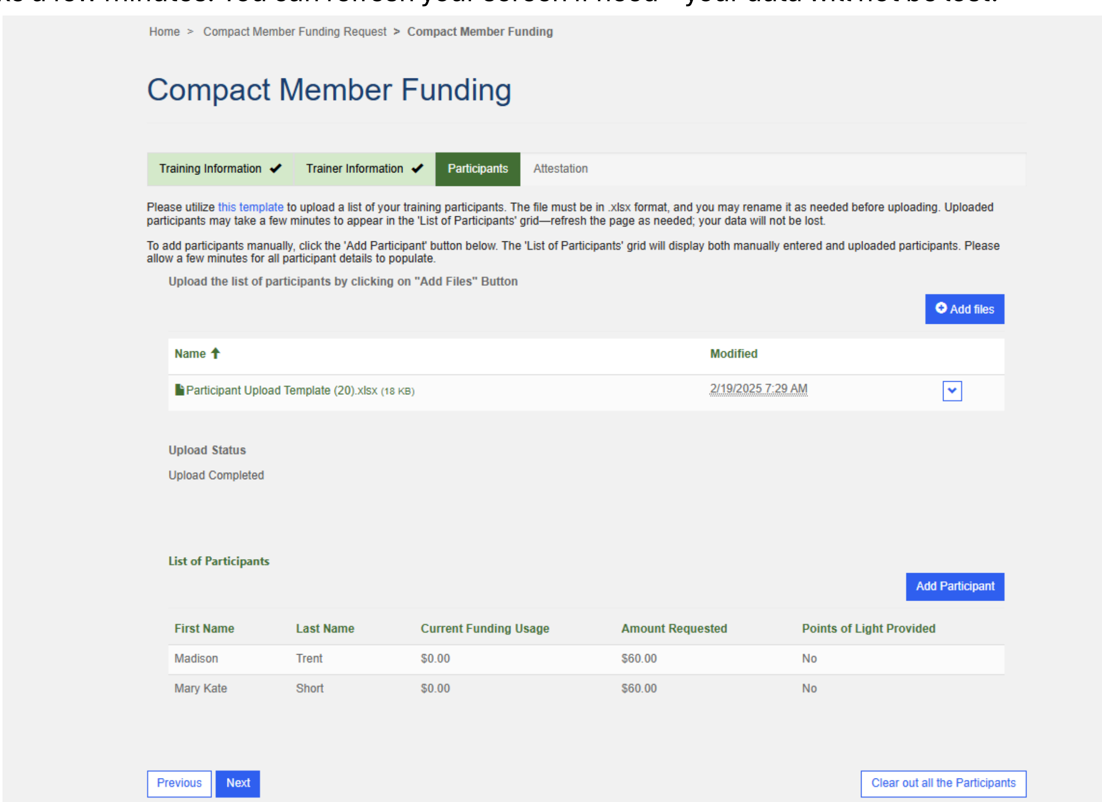
When you are done, click '**Next**'.

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:

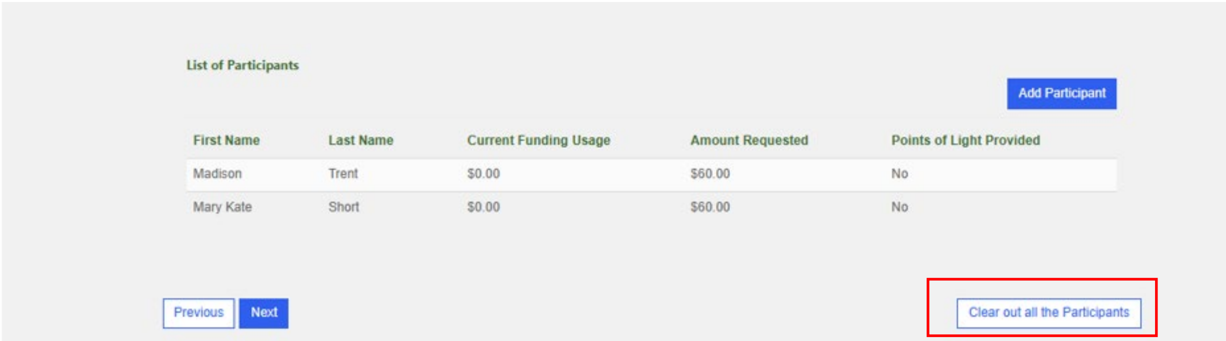


Once you have added your participants, they will appear in the 'List of Participants' grid. This may take a few minutes. You can refresh your screen if need – your data will not be lost:



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.

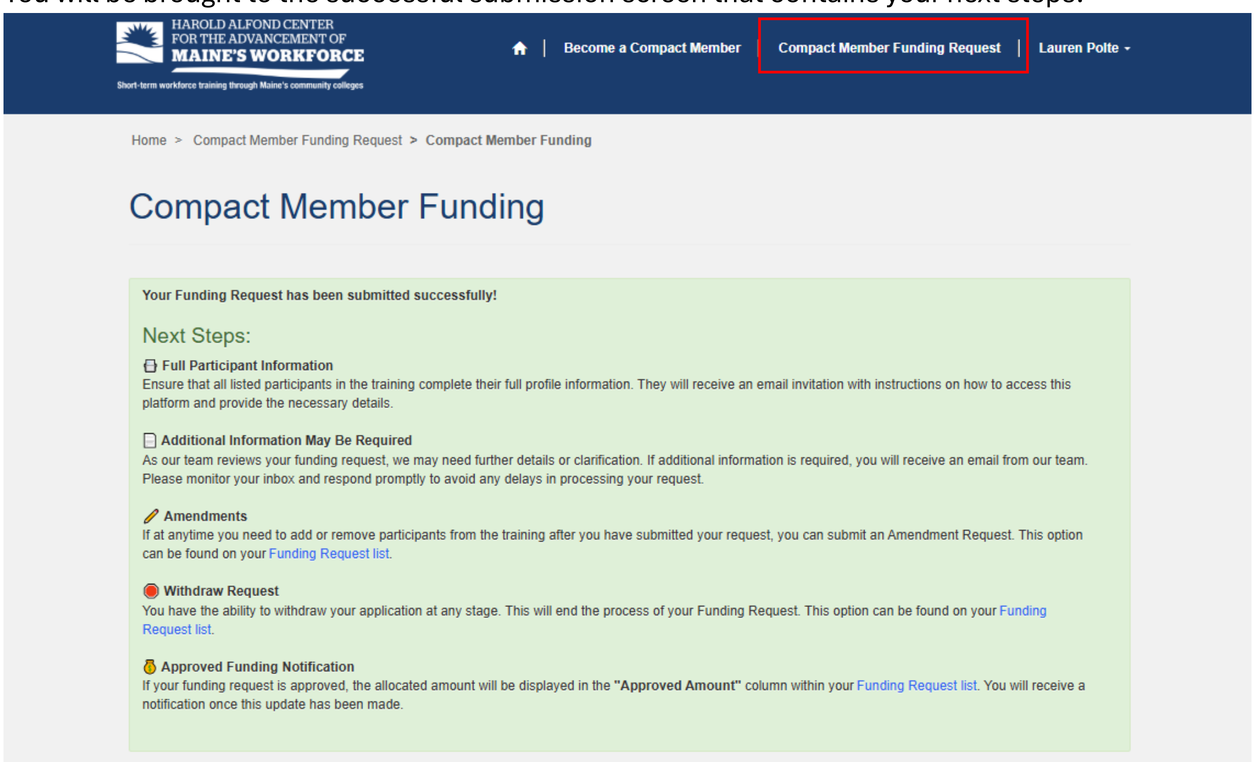


Once you see your participants listed, click '**Next**'.

Attestation

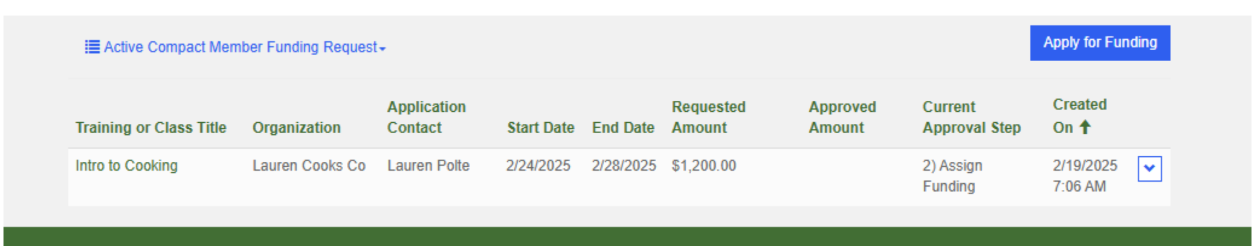
On the 'Attestation' page, you must acknowledge the statement. Then, click '**Submit'**.

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



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

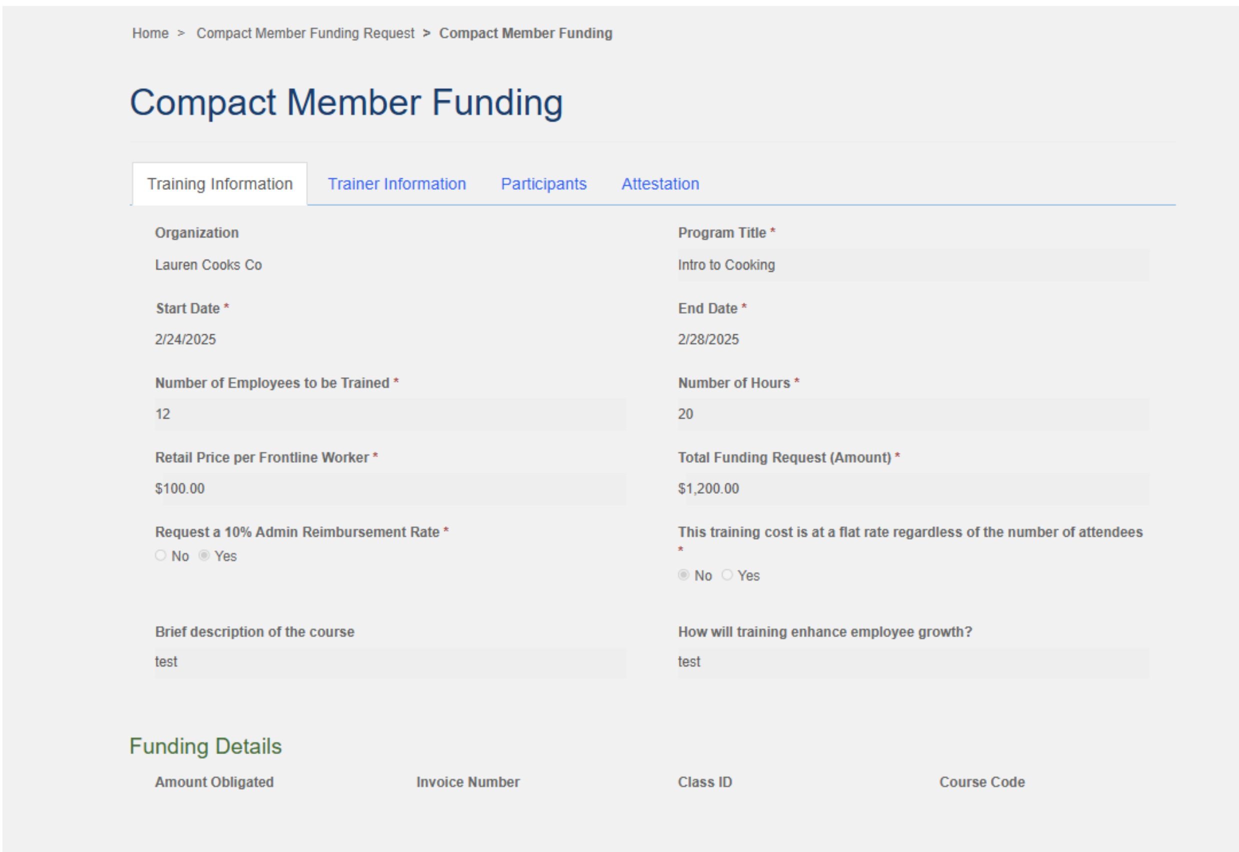
You can now see your submitted funding request. It is in the stage of '**Assign Funding'**, which means it is being evaluated by MCCS staff for funding:



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.

View Request

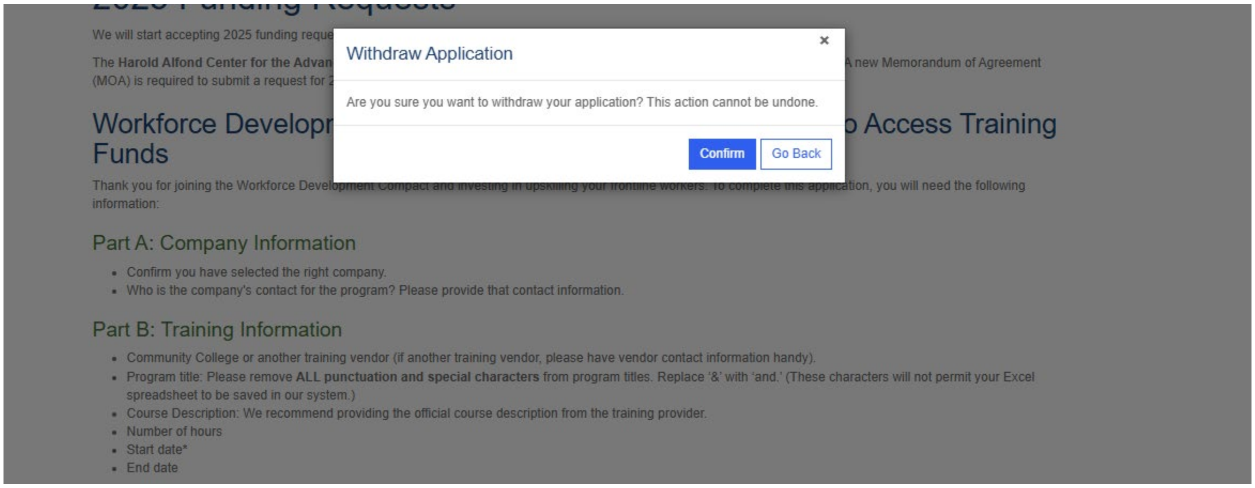
A read-only version of your funding request:



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

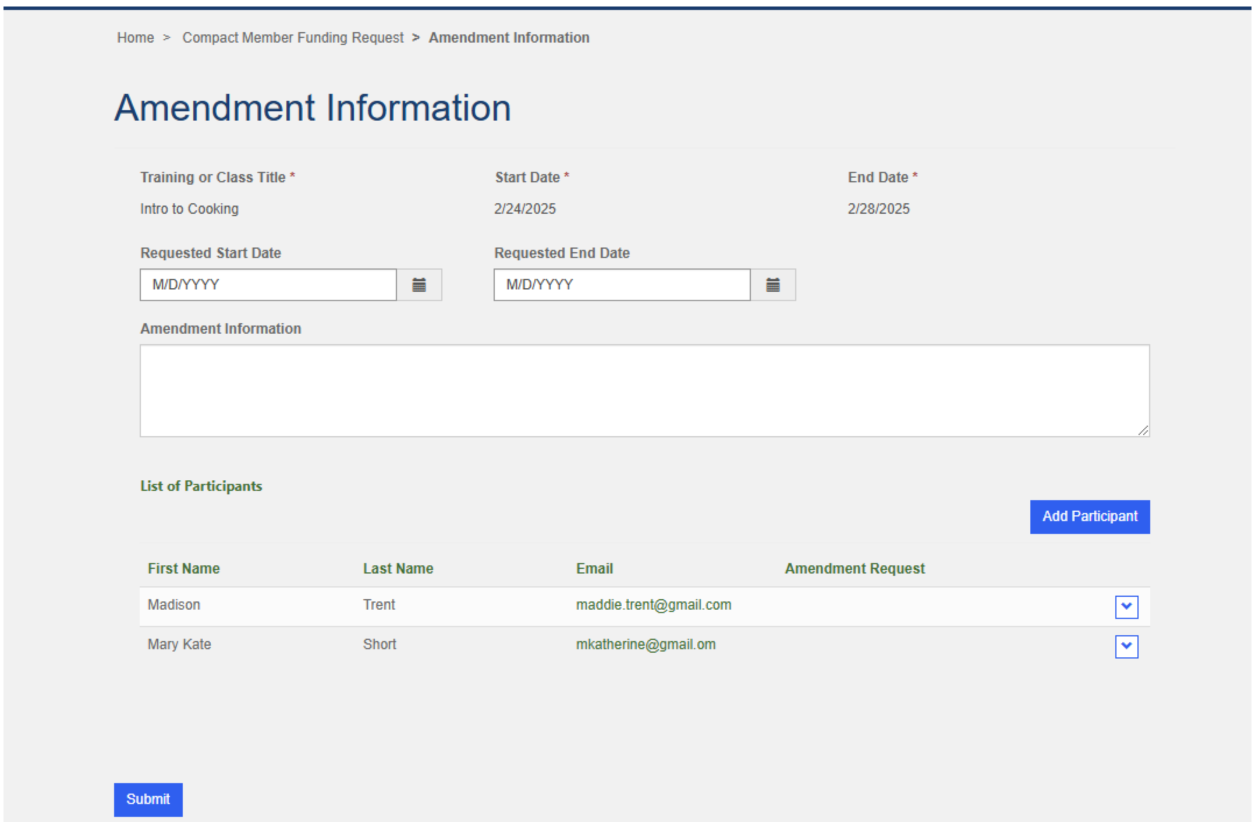
Withdraw Application

Stop your application and remove it for the funding process

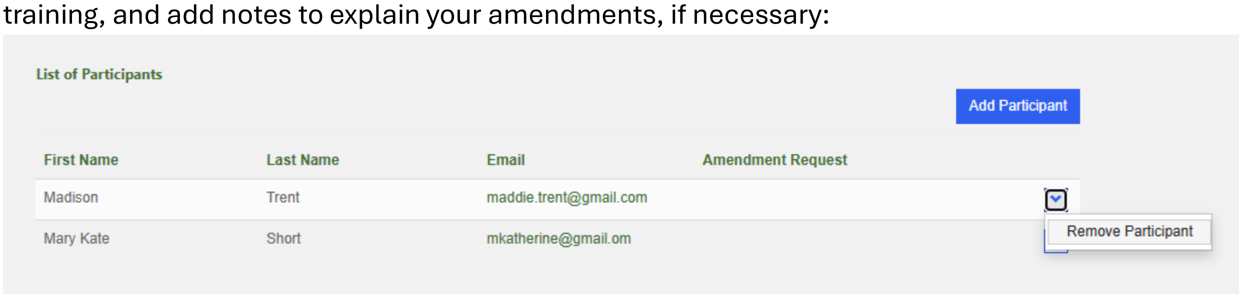


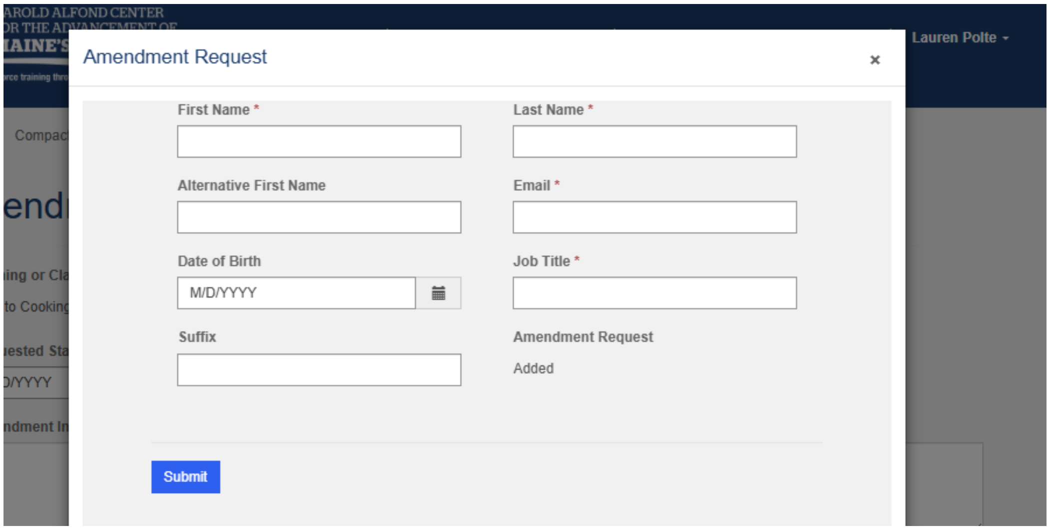
Amendment Request

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



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:

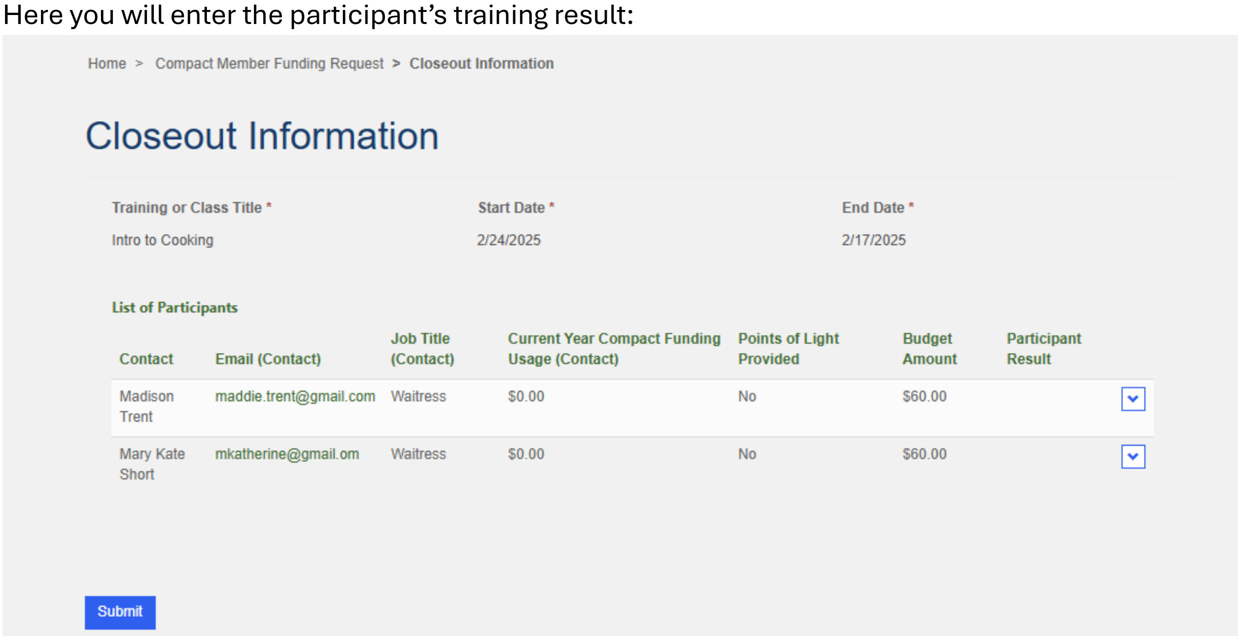


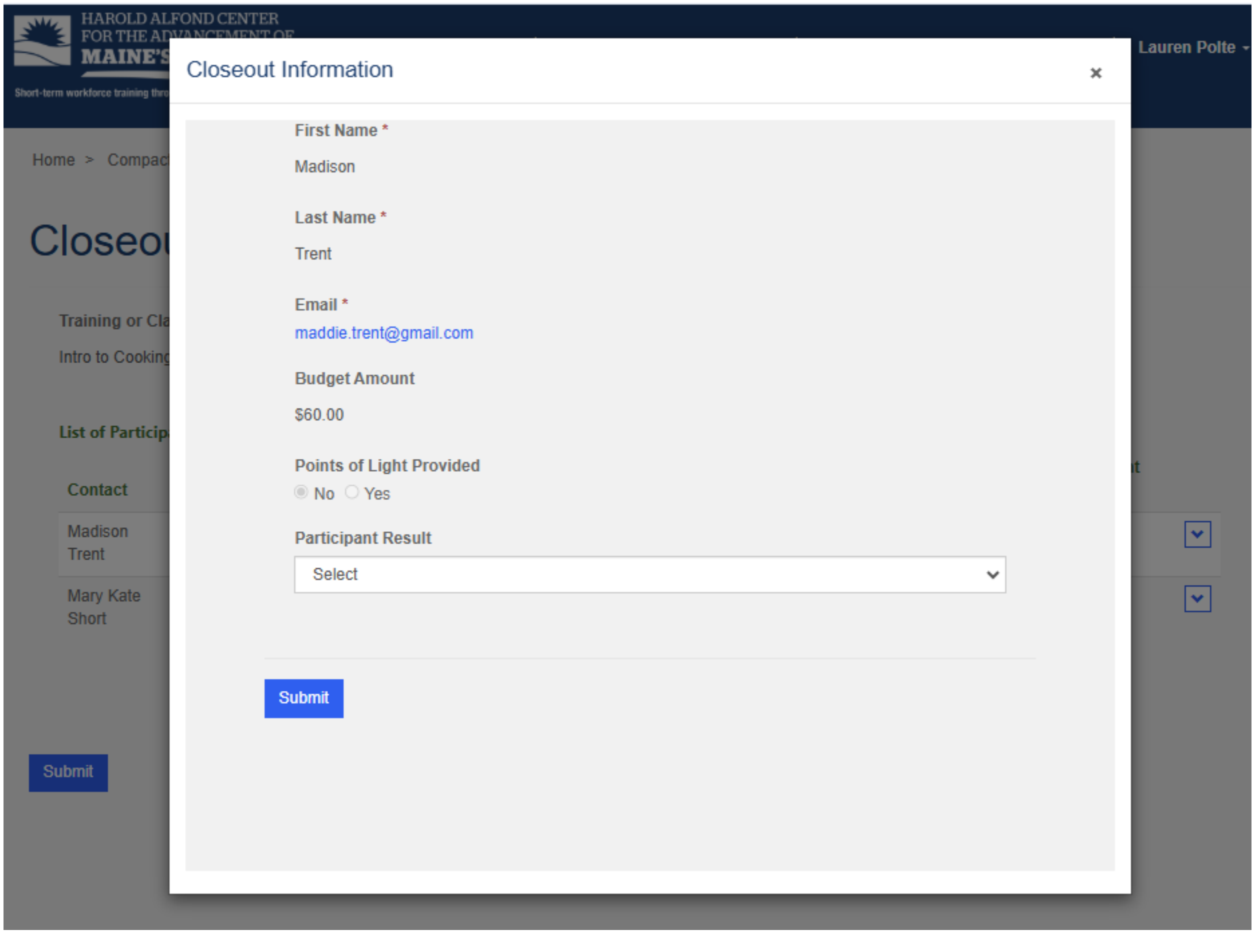


External Training Closeout

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.

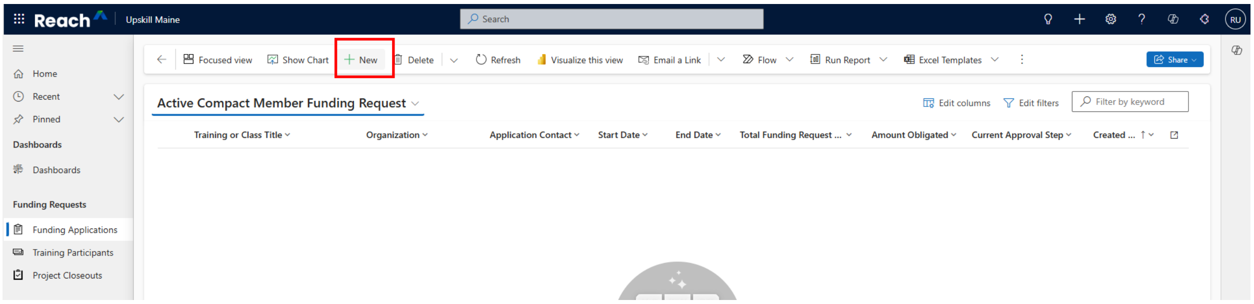
Here you will enter the participant's training result:



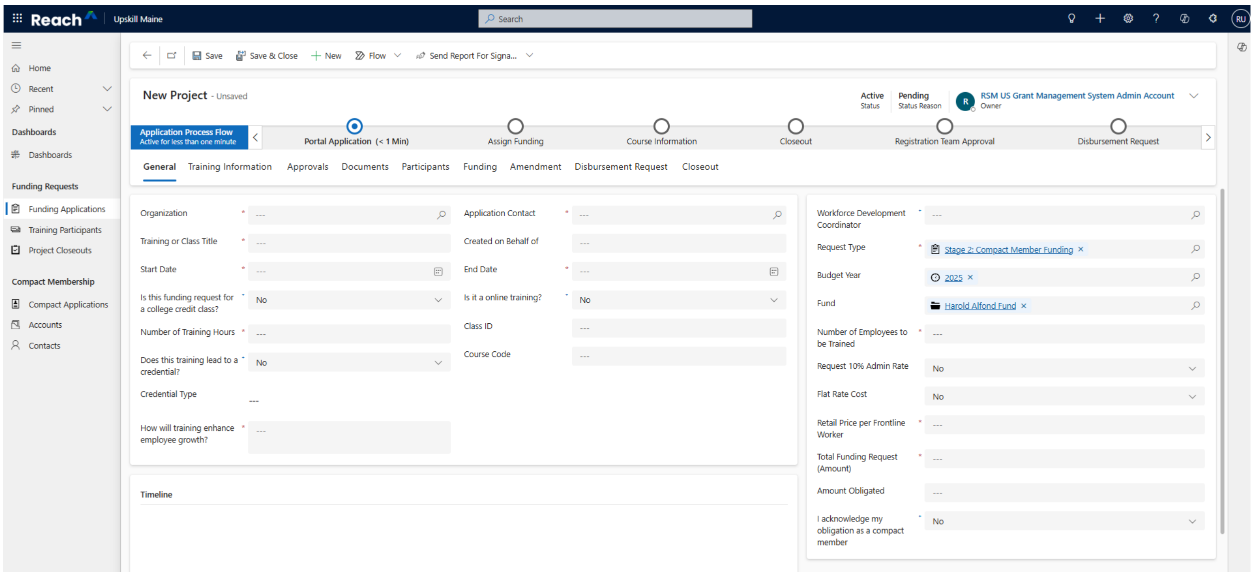

HAROLD ALFOND CENTER
FOR THE ADVANCEMENT OF
MAINE'S
Lauren Polte
Home > Compac
Closeou
Training or Cla
Intro to Cooking
List of Particip
Contact
Madison Trent
Mary Kate Short
Submit
Closeout Information
First Name *
Madison
Last Name *
Trent
Email *
maddie.trent@gmail.com
Budget Amount
$60.00
Points 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**'.



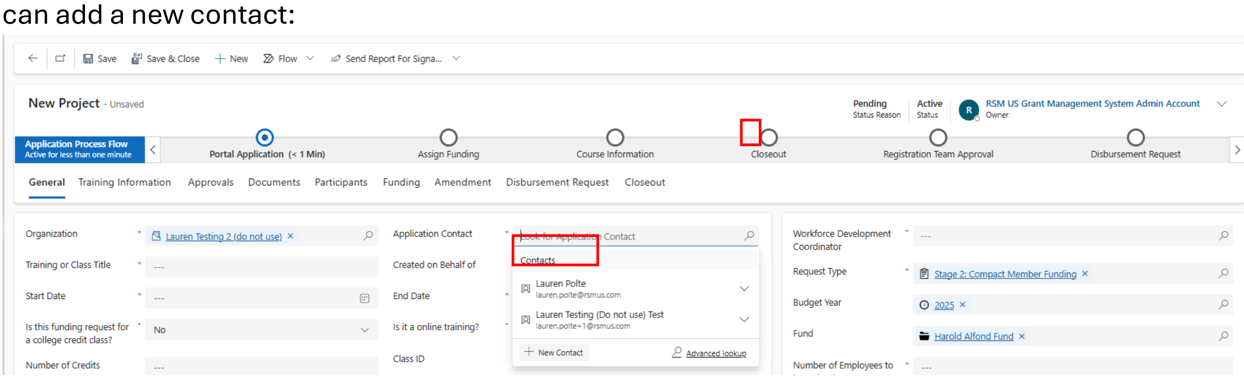
Enter required information



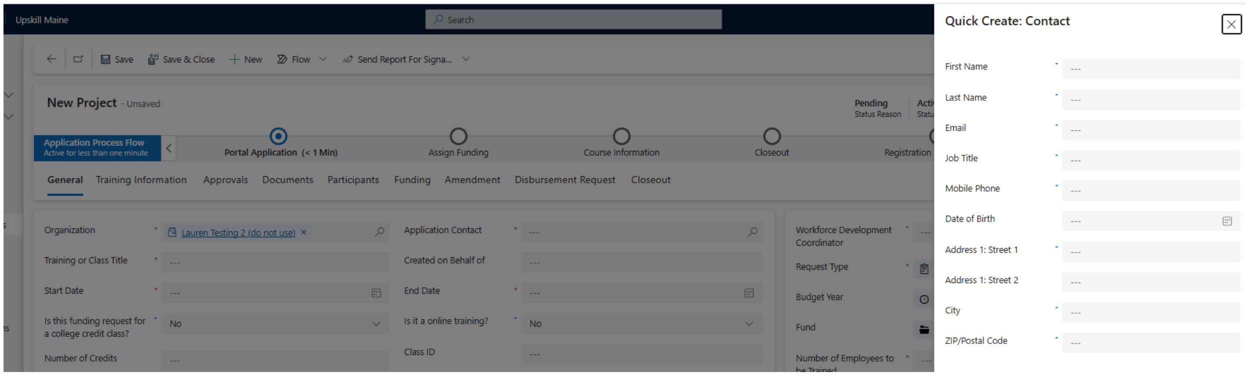
Begin by searching for the '**Organization**'.

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:



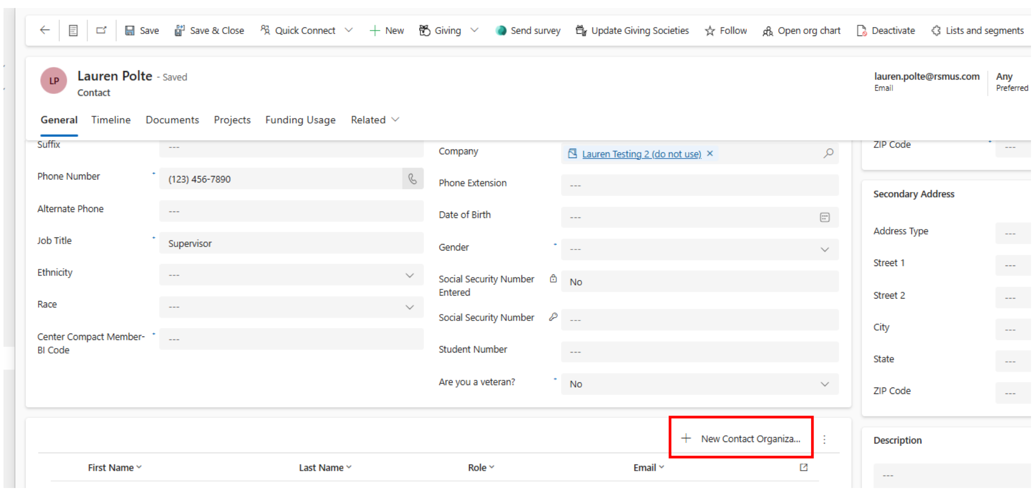
A pop-out window will open for you to add the contact information:



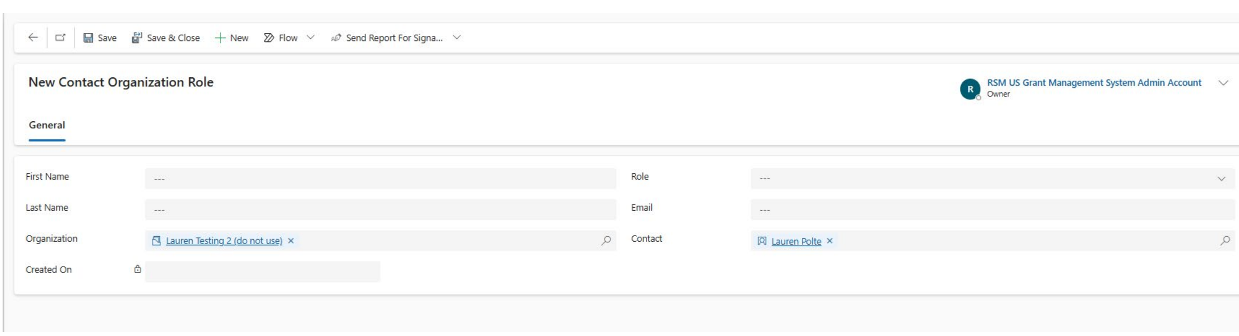
When you are done entering the contact information, click '**Save & Close**'. You will see the Contact populate now in the '**Application Contact**'.

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.



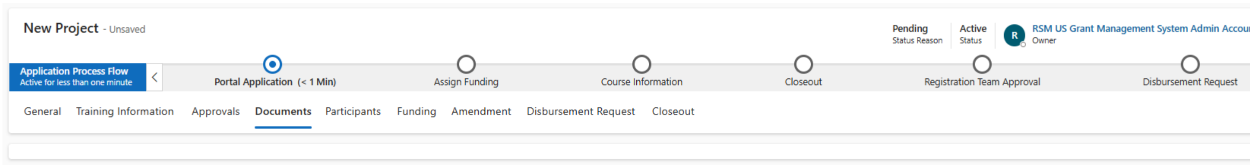
The organization will be populated with the '**Company**' that is populated on the Contact. Here, you will need to enter their **First Name, Last Name, Role, and Email.** Once you have entered this, click '**Save & Close**'

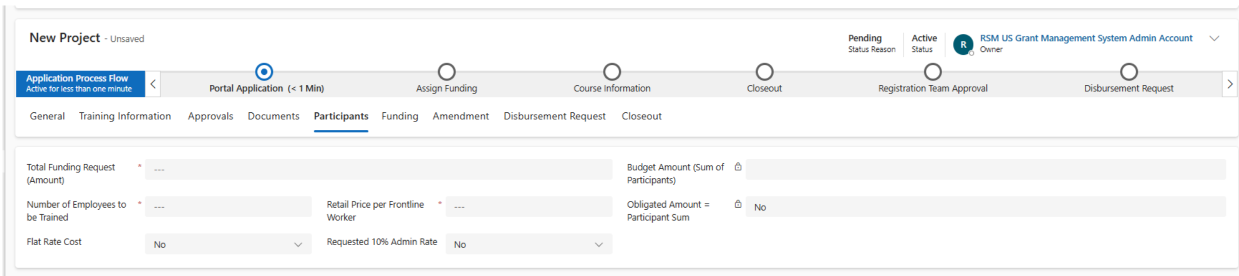
You will see the Contact Organization Role record you just created in the grid on the contact.

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:



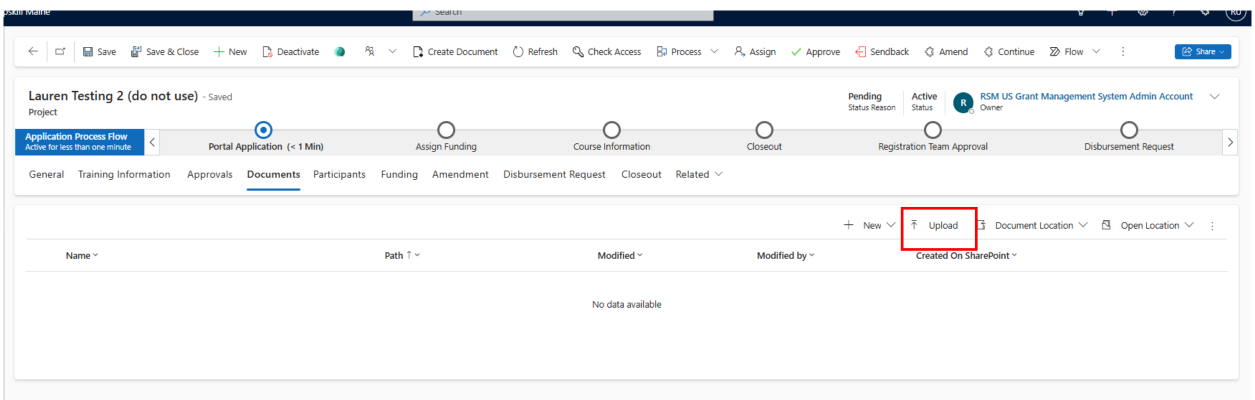


Once saved, you can add participants.

Adding Participants

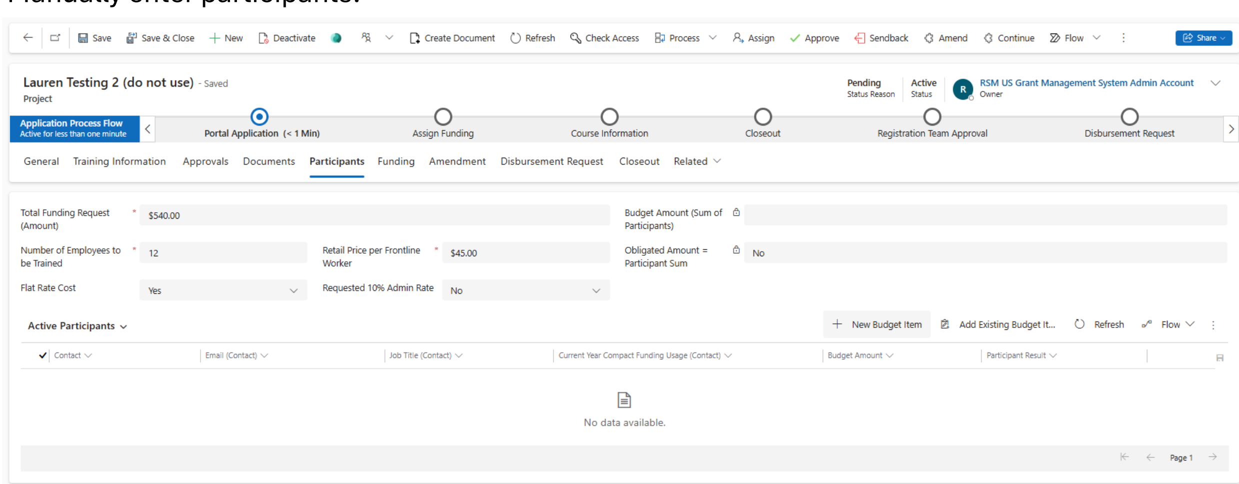
You can do this in one of two ways: upload the Participant Upload Excel template on the '**Documents'** or manually add Participants on the grid on the '**Participants**' tab.

Upload:

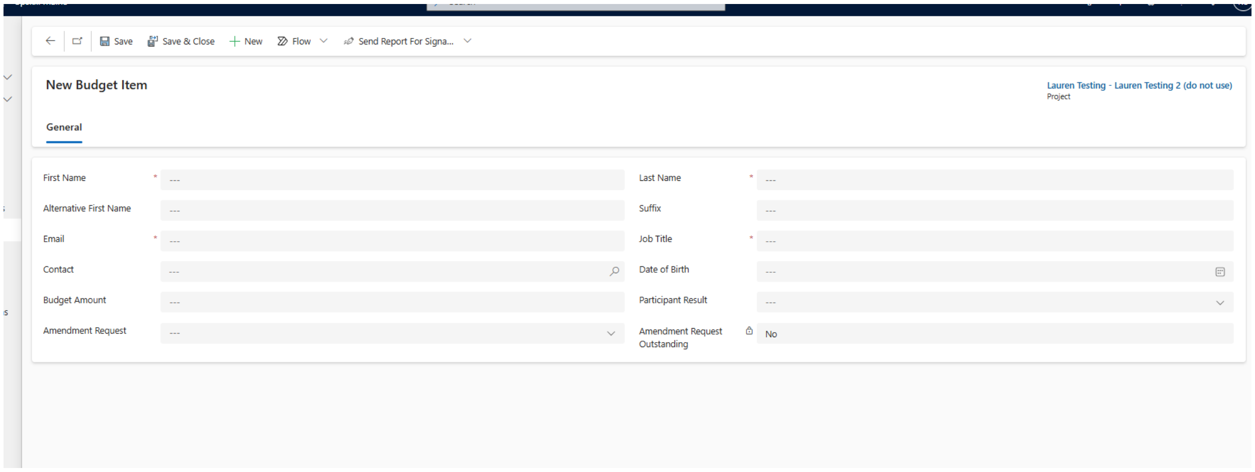


It will take a few moments for the Participants to show in the grid on the '**Participants**' tab with upload.

Manually enter participants:



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



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.

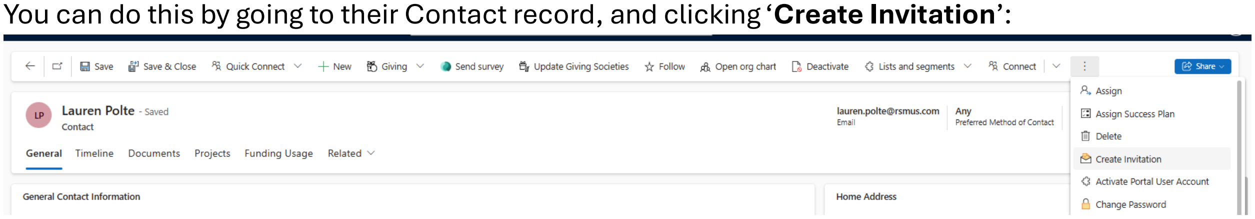
Repeat this process as needed.

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

Compact Member to complete Attestation

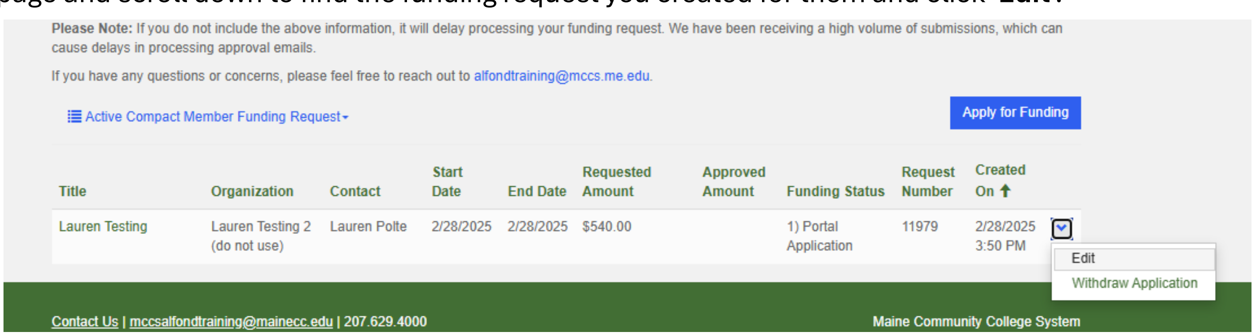
At this time, you have completed the necessary steps for this Application Contact to now go into the system and complete the attestation. You can let the **Application Contact** know that they can now login into the Upskill Maine portal and '**Edit**' the funding request.

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**':



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" 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**'.



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

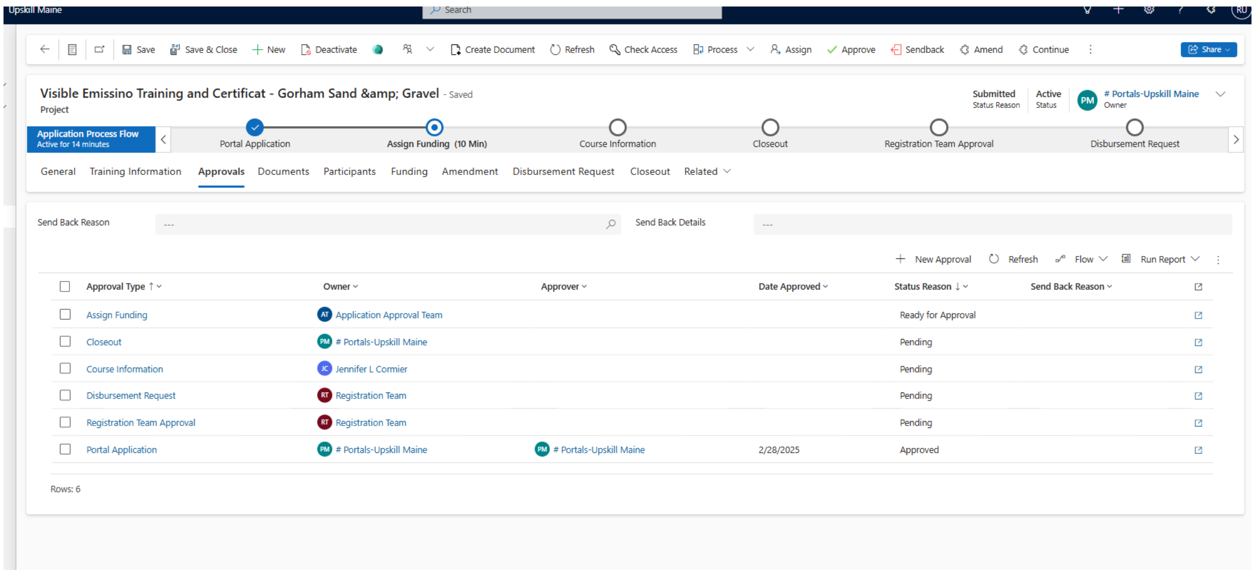
Once they have submitted, the application will move into the '**Assign Funding**' stage and will be prompted for approval. No further action is need on your part if you are not a part of the **Application Approval Team**.

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



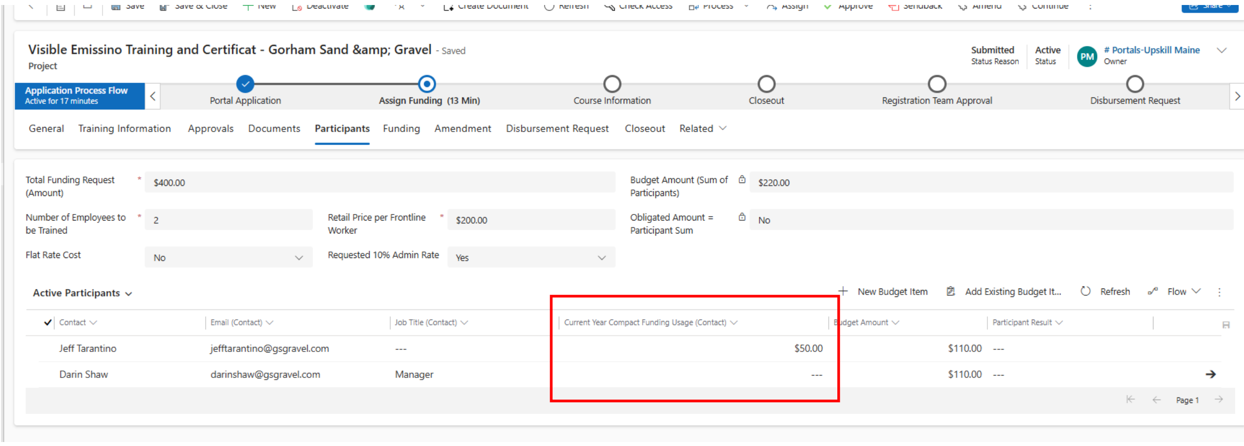
When a Funding Request is submitted through the portal, the 'Portal Application' approval is automatically approved, and the application is moved into the 'Assign Funding' stage.

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.

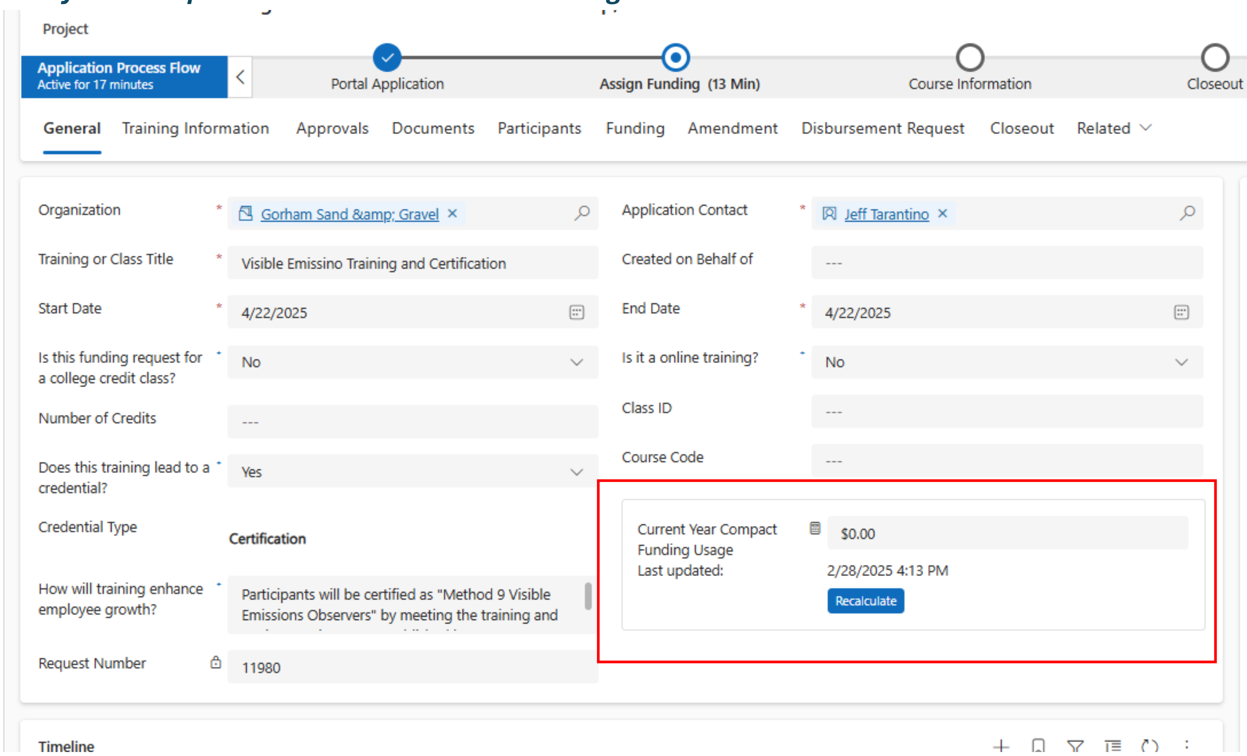
Application Approval Team

Verify all attendees have available funding

You can view this at the ‘**Current Year Compact Funding Usage**’:

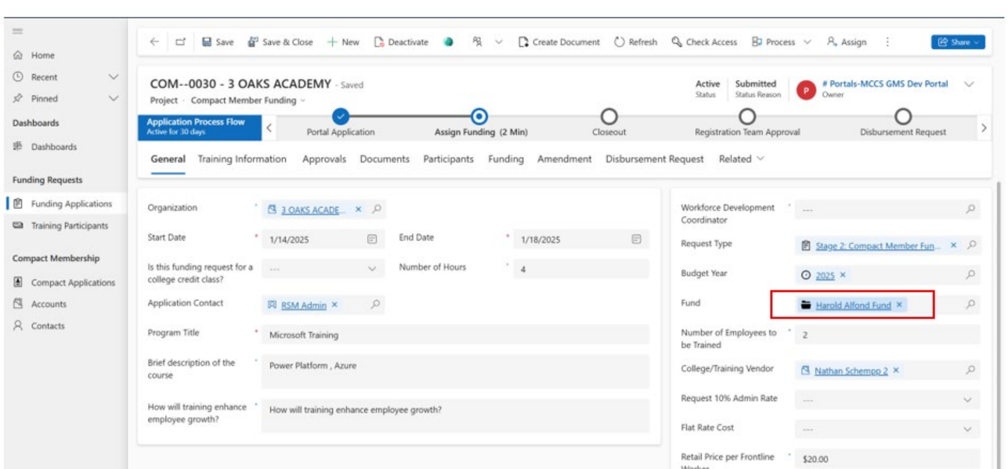


Verify the Compact Member has available funding:

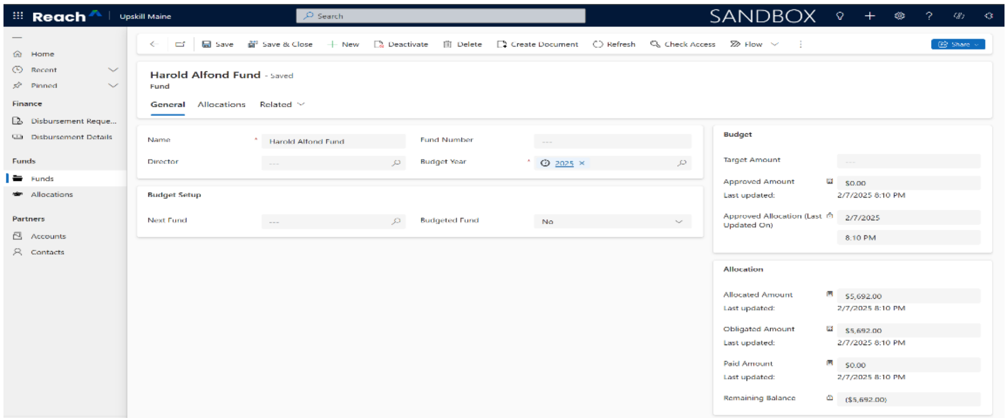


Verify funding is available:

Click on the ‘Fund’ in the righthand section on the ‘General’ tab.



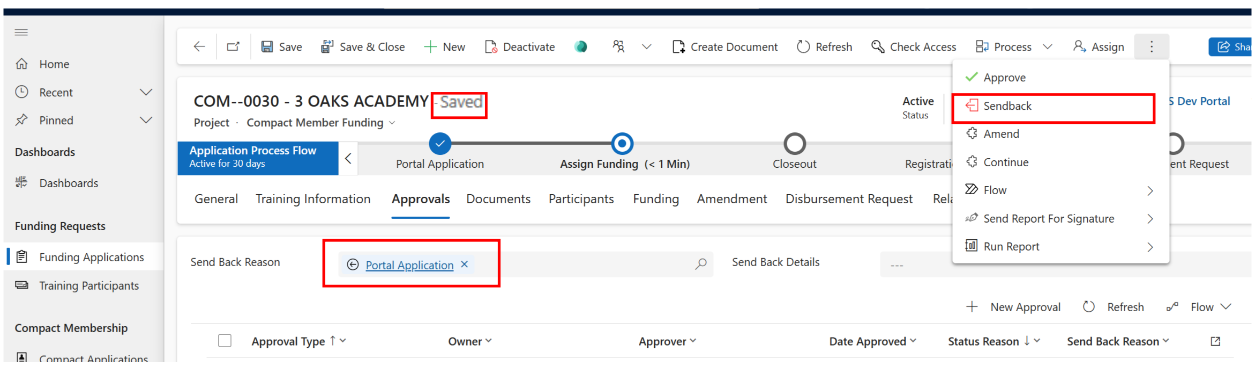
You will be directed to the fund source of the project and can view the funding available.



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

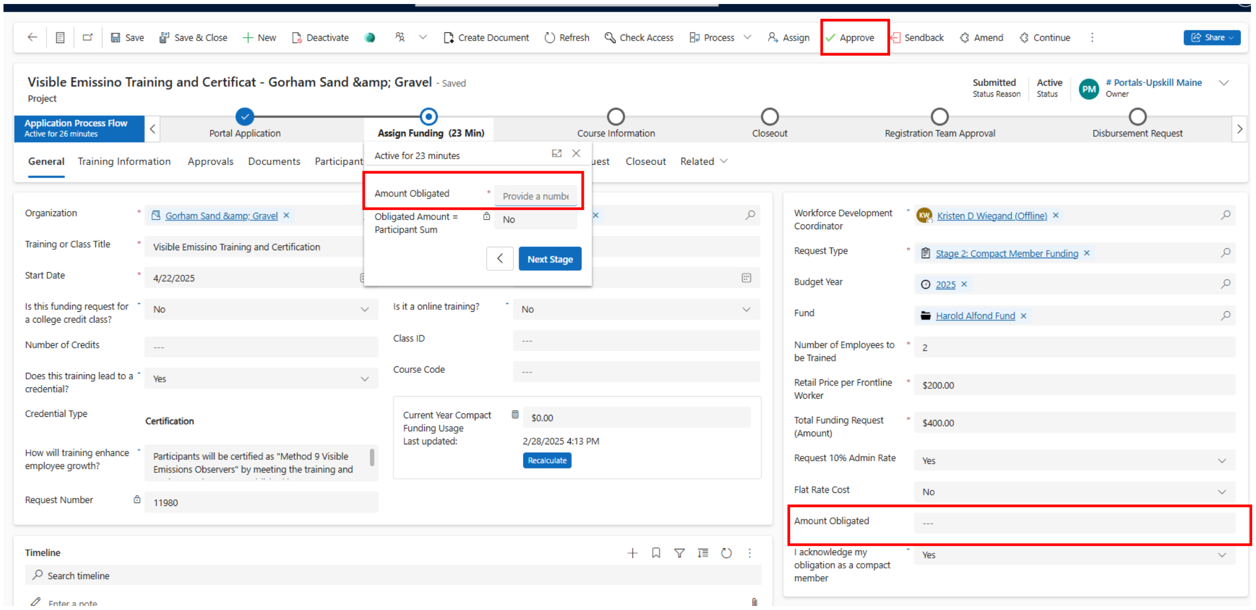
If there is any missing or invalid information before you assign funding, you can 'send back' the application to the application contact, which will re-open it for them on the portal. On the '**Approvals**' tab, set the '**Send Back Reason**' to '**Portal Application**' and enter a reason in '**Send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



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.

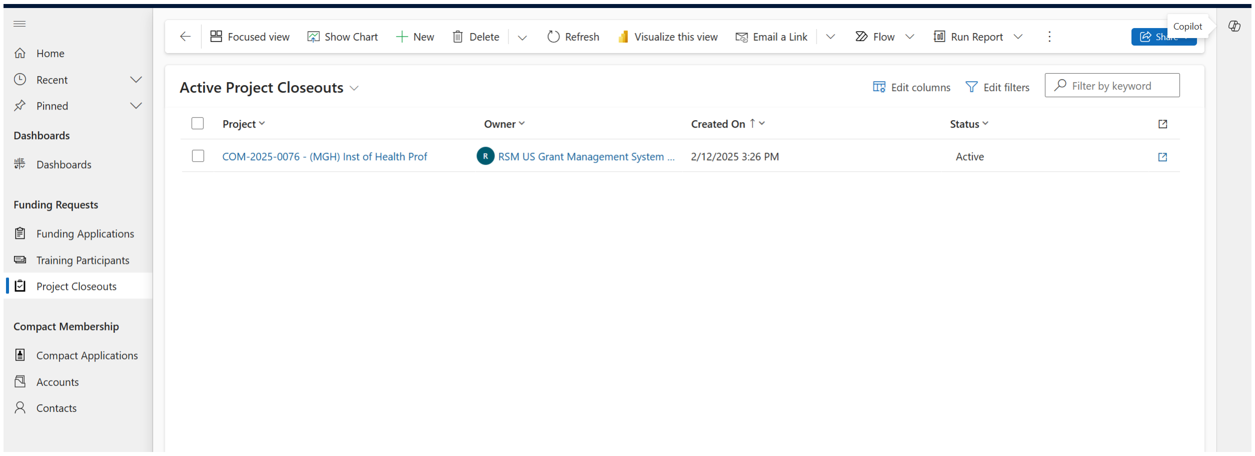
College Training Closeouts

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

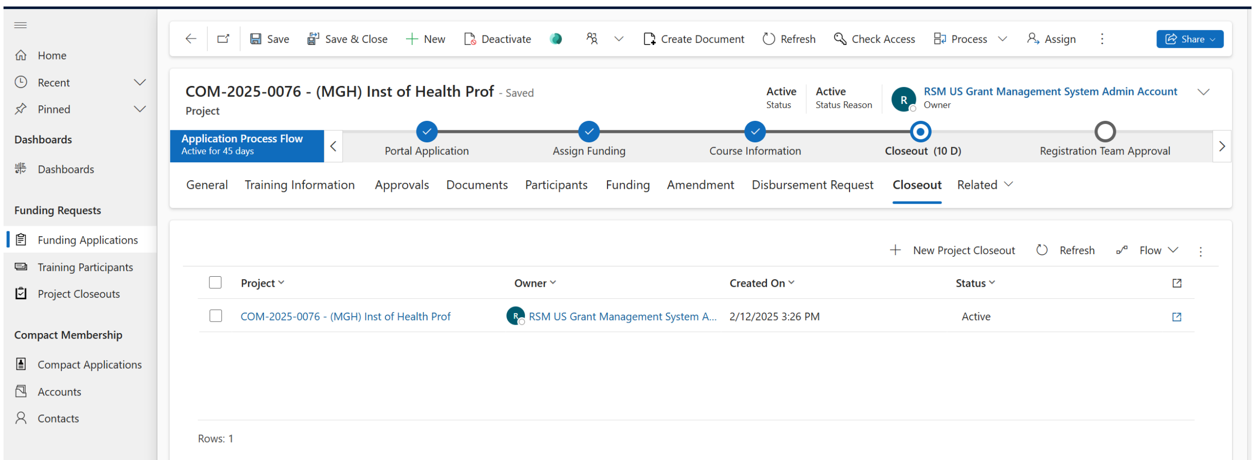
There is automation in place to check daily if a funding request with a Maine Community College System Campus has a training where the end date has passed, and it is currently in the Closeout approval step.

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)

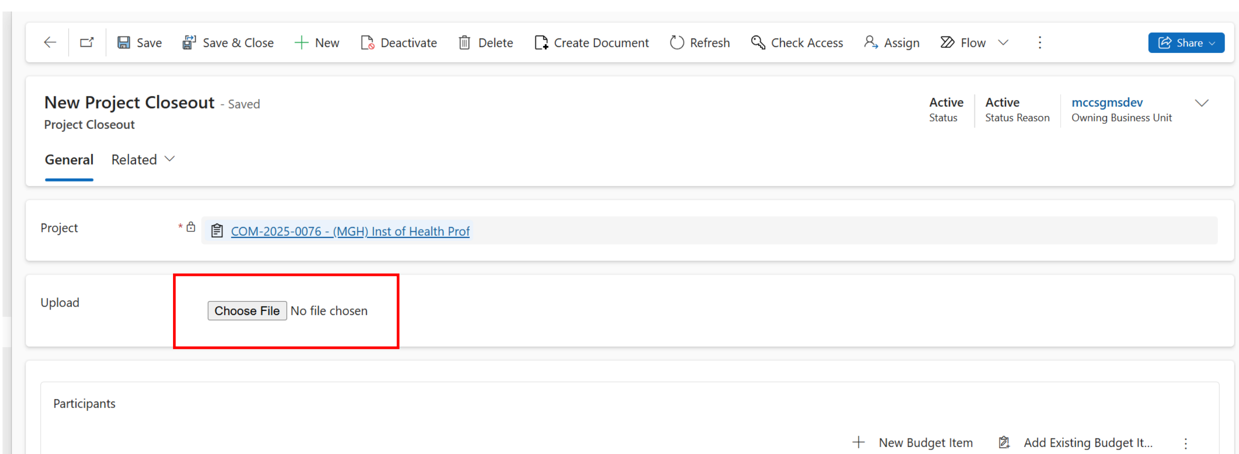


Or on the Funding Request record under the ‘**Closeout’** tab:

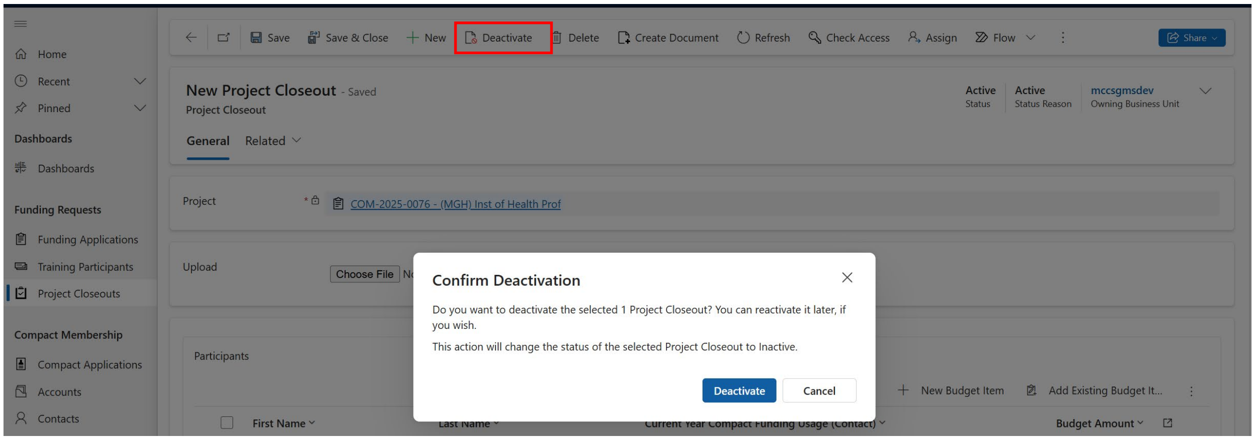


The action needed from the College is to upload the spreadsheet of results:

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.