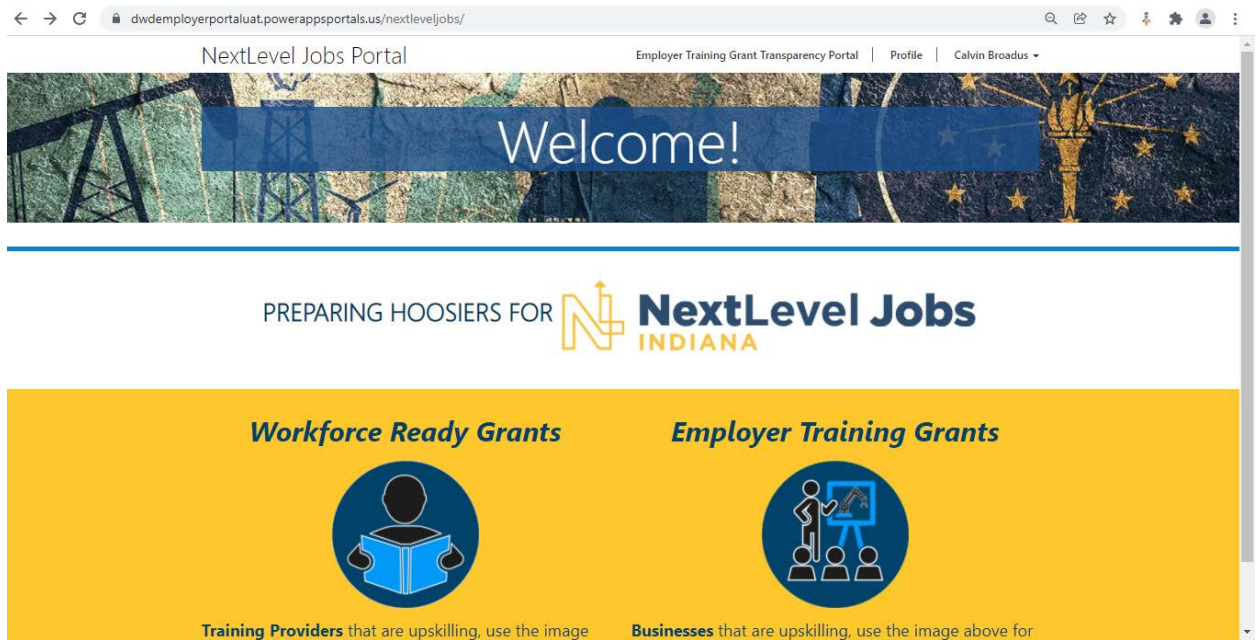# Employer Portal Training Manual

To access the Employer Portal you will need to receive an email invitation with a link to set up your account.

- Once logged in, select 'Employer Training Grants' on the main page.

- To view your applications, select 'My Grant Applications' on the top menu

- Select the grant application you want to work on from the list by selecting the highlighted column:

- The 'General' tab of your grant application will display the information contained within the DWD computer system. You will be able to update the 'Application Contact' on this tab. To make additional updates please contact your DWD representative.

Viewing/Creating Training Plans

- The 'Training Plan' tab will display all training plans that have been created for this application. You can edit a training plan in a draft status by selecting the drop down on the right side of the grid or you can create a new training plan by selecting '+ Create'.


- When creating a new training plan, all fields with an asterisk (*) are required to be filled in before you can save the new training plan

- Once created, you can then edit the newly created training plan. You will start on the 'General' tab, filling in all information before moving to the 'Affected Occupations' tab. Select the magnify glass on the 'Occupation' field to search for the occupations to add. Once found, select the checkbox and choose, 'Select', followed by 'Submit'
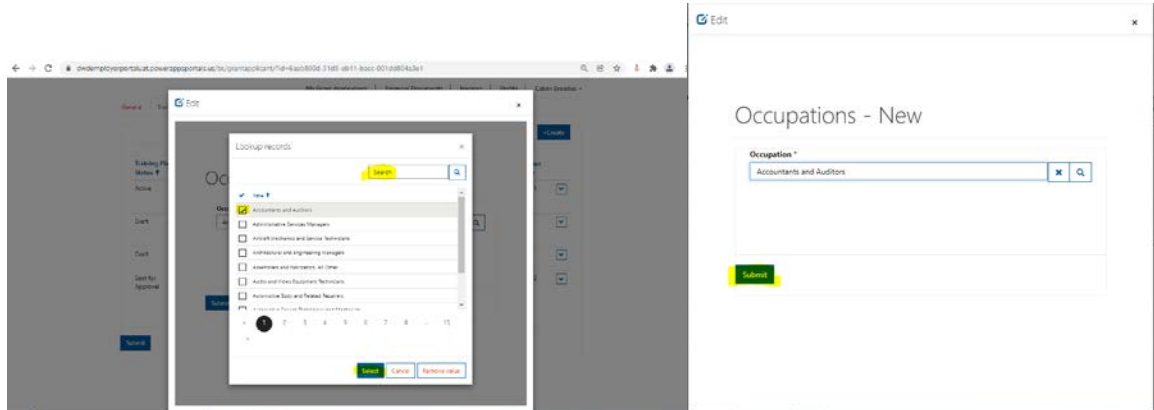
- When you have completed the 'General' and 'Affected Occupations' tabs you can now add any documents to the 'Documents' tab and submit the training plan for approval. To submit for approval, navigate to the 'General' tab and scroll down. Select 'Yes' under the heading 'Submit Plan' and select 'save'.

- Your training plan has now been sent to DWD for approval. The training plan status will be updated when DWD has approved or returned your training plan for edits.

Adding Trainees to a Training Plan

- Once a training plan is approved by DWD, trainees can be added to the training plan. You will need to add the trainees information and then update their status once they have completed the training so you can invoice DWD. Let's look at how to add a trainee and we will review invoicing later.

- Go to the active training plan the trainee is participating in and then go to the 'Trainees' tab. Here you can see all trainees added to this training plan and their status. To add, select the '+ Create' button. To edit a current trainee, scroll the grid to the right and select the dropdown to edit.

- When adding a new trainee, fill in all of the fields and select 'Submit'. The trainee will automatically be given the trainee status of 'Enrolled' on creation. Once the trainee has been created you may edit the status.

- Once a student has either completed or dropped out of the training you may edit the trainee status. After choosing 'edit' on the trainee record, scroll down to 'Trainee Status' and select either 'Completed' or 'Dropped' depending on the situation. **Once the trainee status is updated to 'Completed' that trainee will be added to any new invoice created for the training plan.**
    a. Completed means the trainee has successfully finished the training
    b. Dropped means the trainee has withdrawn from the training and has no intention of completing it in the future.

- Enrolled is the default status and the trainee can remain in this status until one of the other options is more appropriate
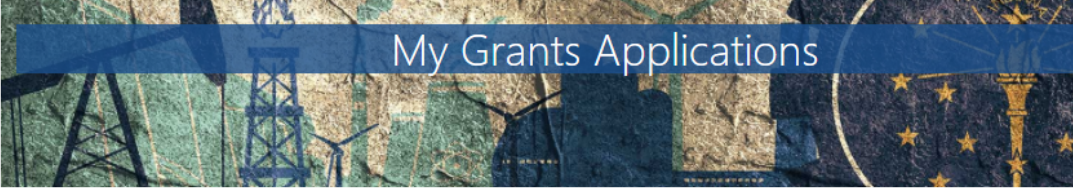
Uploading Financial Documents

- Click on the Financial Documents Tab at the top of the page (This tab will always be displayed when logged into your portal account)

- From here you can select which type of financial document that you would like to upload by clicking on that particular document type

- You will then be taken to the page of that financial where you'll be able to upload your financial document by clicking on the Add note button

NextLevel Jobs > Business Services > Financial Documents List > **Financial Documents**

Financial Documents

General

Document Type *

W-9

Account *

Test

Last Received

12/7/2021 12:38 PM

Notes

8 days ago   Test W-9 document.
Kenny
Kincy   Test Document.docx (11.51 KB)

[Add note]

- A small box will appear. Click on Choose File to find the financial document that you would like to upload. Once you've found and selected your file, click Add note

My Grant Applications | Financial Documents | Inv

Add note   ✕

Note   [   ]

Attach a file   [Choose File] No file chosen

[Add note] Cancel

- Your file has now been uploaded to your account. Once uploaded to your account, your business representative is now able to view your document on their end.
- A history of your documents uploaded is listed here with the most recent document appearing at the top. Your different documents can be viewed from this list as well by clicking on the name of the document

Financial Documents

General

Document Type *

W-9

Account *

Test

Last Received

12/15/2021 10:27 AM

Notes

3 minutes ago Kenny Kincy	📄 Test Document.docx (11.51 KB)
8 days ago Kenny Kincy	Test W-9 document. 📄 Test Document.docx (11.51 KB)

Add note

Creating a new invoice

- Go to 'My Grant Applications' on the top menu and select the appropriate application by clicking on the 'Created on' date.

- Go to the 'Training Plan' tab and select the training plan that is ready for an invoice by choosing the menu by choosing the menu on the far right and selecting 'Edit'. A training plan must be active for an invoice to be created.

- Ensure all trainees have the appropriate trainee status. A trainee must have completed the training and have a trainee status of 'Completed' before an invoice is created. When the invoice is created and saved, all trainees with a trainee status of 'Completed' will be added to the invoice.

- Go to the Invoice tab and click on the 'Create' button. Click 'submit on the form that pops up and this will create the invoice
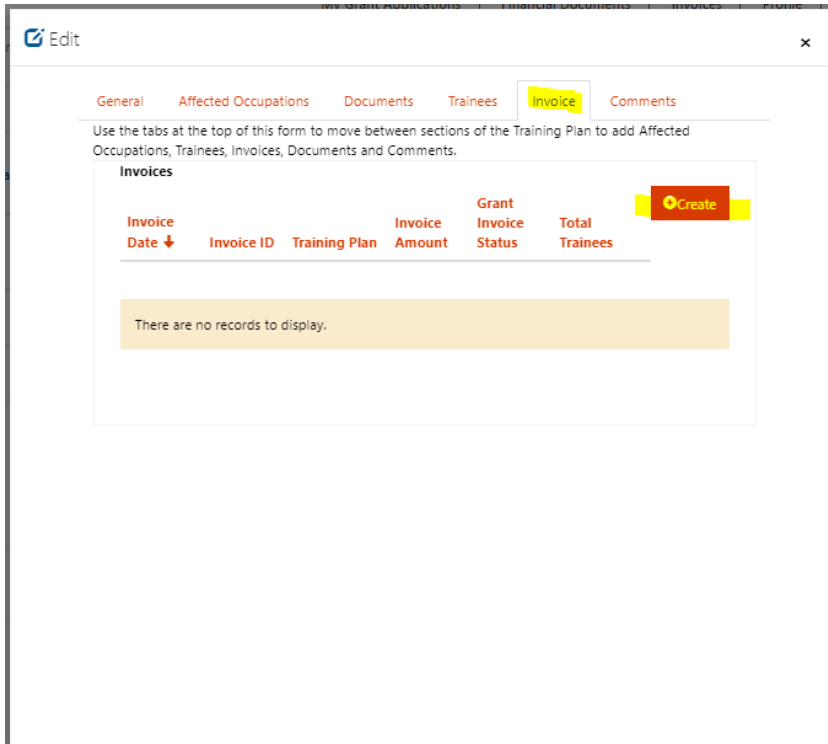
- When you select 'Invoices' from the top menu you will see your newly created invoice along with the trainees that were added.
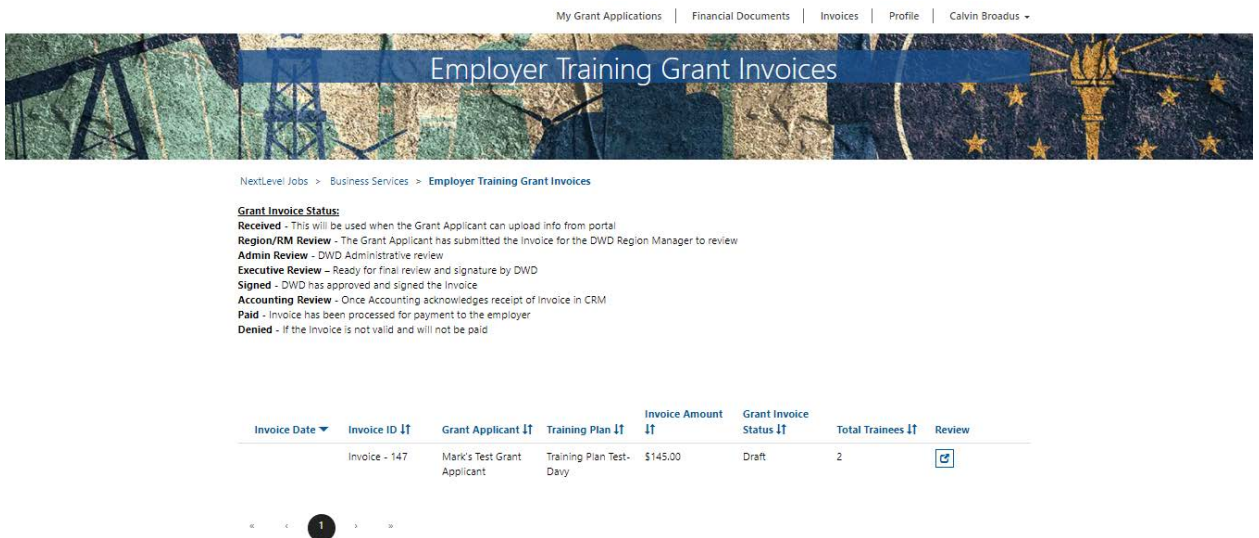
Viewing/Editing an Invoice

- To view the invoices you have already created you can go to 'My Grant Applications' and select the 'Invoices' link at the top of the page.

- You can review the invoices, but you can not edit. In order to edit you must navigate through the grant application, which we will show you in the next steps.

- Select 'My Grant Applications' from the top menu. Select the appropriate application.
- Go to the 'Training Plan' tab and select the training plan for which the invoice was created. Click on the down arrow menu on the far right and select, 'Edit'.

- Go to the 'Invoice' tab and navigate to the invoice of your choosing by selecting the down arrow and choosing 'edit'.
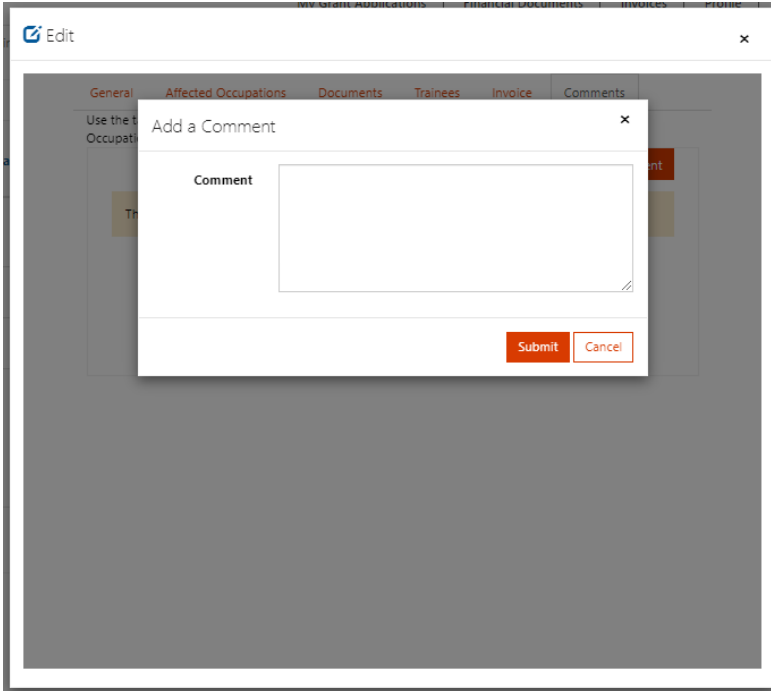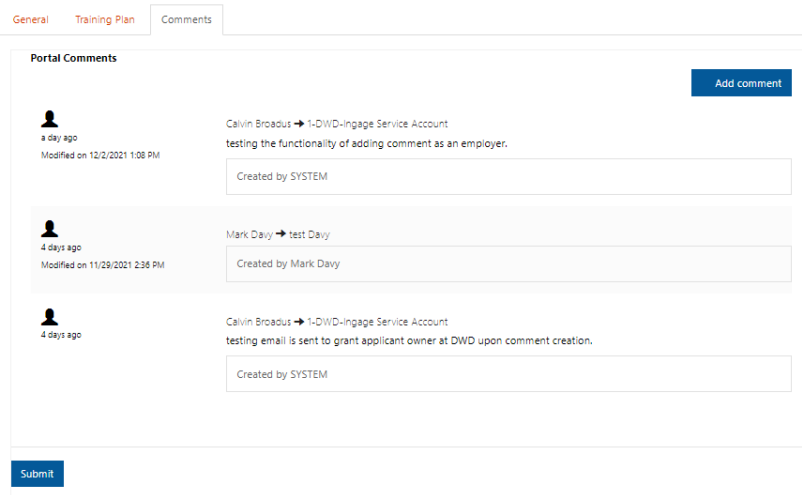
<mark>Comments</mark>

- If you would like to communicate with DWD via the portal, you may create a comment on a Grant Application and/or Training plan. In order to do so, navigate to the grant application or training plan and select the 'Comments' tab.
- Select the button 'Add Comment' and type in your correspondence and select 'Submit'
- After submitting, the DWD worker will be able to view your comment from within the internal DWD computer system. They can reply back to you at which point you will receive an email notifying you of their response.

- A history of the communication will be kept under the 'Comment' tab.