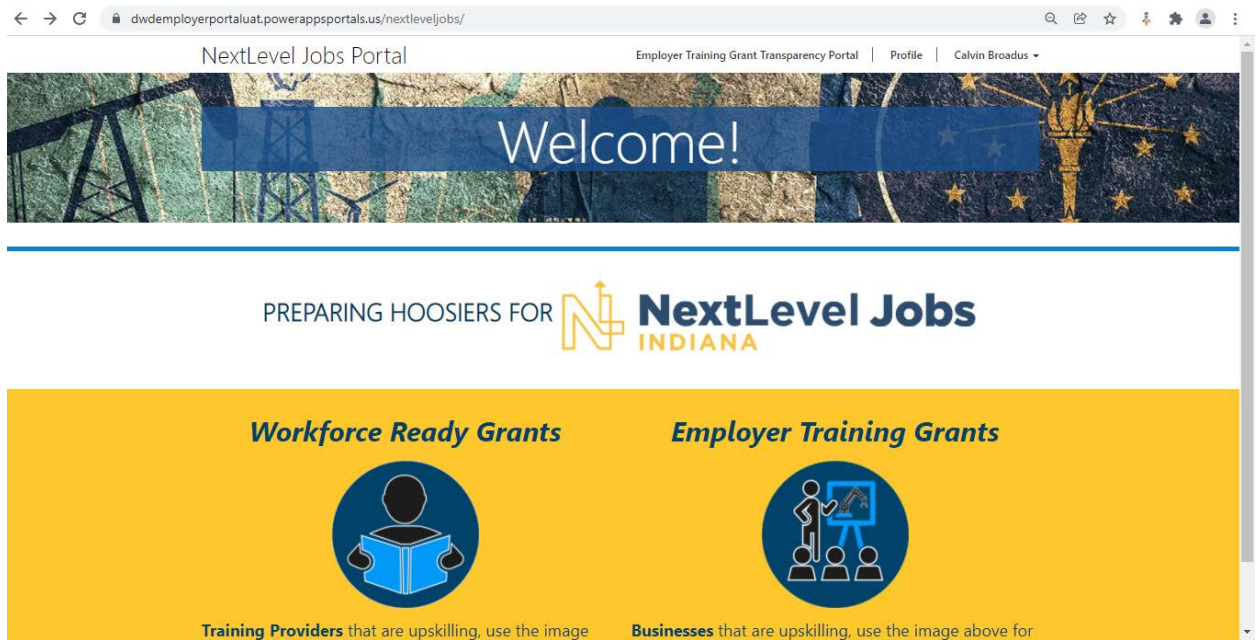


Employer Portal Training Manual

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'.

The screenshot shows a web browser window with the URL dwdemployerportaluat.powerappsportals.us/bs/grantapplicant/?id=6aab860d-31d8-eb11-bacc-001dd804a3e1. The page has tabs for 'General', 'Training Plan', and 'Comments'. The 'Training Plan' tab is active, showing a table with the following data:

Training Plan Status ↑	Training Plan Name	Grant Period	Average Hourly Wage	Total Trainees	Total Training Plan Amount	Remaining Reimbursement	Agreement Start Date	Agreement End Date	
Active	Training Plan Test-Davy	5.0	14.00	6	1800	1755	2/3/2021	11/3/2021	▼
Draft	CAD operator	5.0	39.00	5	5000	5000			▼
Sent for Approval	Training test 3	5.0	17.00	4	400	400	8/27/2021	5/27/2022	▼

There is a '+ Create' button in the top right corner and a 'Submit' button at the bottom left of the grid area.

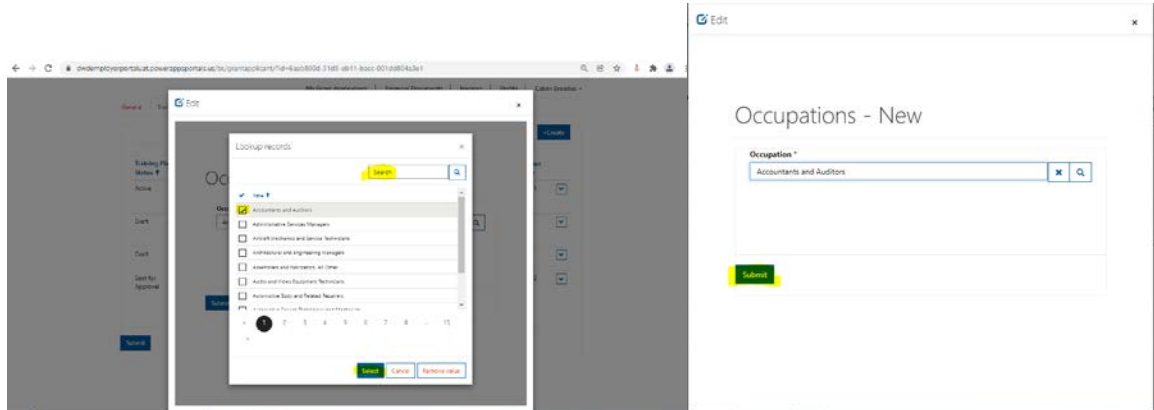
- When creating a new training plan, all fields with an asterisk (*) are required to be filled in before you can save the new training plan

The screenshot shows the 'Create Training Plan' form. The form title is 'Training Plan' and it includes the following instructions: "Please fill in the Training Plan information. All fields are required. The 'Save' button at the bottom will save your changes and allow you to add additional information required to submit the training plan." The form fields are:

- Application Company Name * (Text input: Mark's Test Grant Applicant)
- Linked Business * (Text input: LIBERTY NATIONAL)
- Training Plan Name * (Text input)
- Average Hourly Wage * (Text input)
- Expected # of New Hires Trained * (Text input)
- Expected # of Current Employees Trained * (Text input)
- Training Type * (Dropdown menu)
- Training Provider (Dropdown menu)
- Training Provider Name (Text input)
- Trainer Contact First Name * (Text input)
- Trainer Contact Last Name * (Text input)

A 'Save' button is visible at the bottom right of the form.

- 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.

General Affected Occupations Documents **Trainees** Invoice Comments

Use the tabs at the top of this form to move between sections of the Training Plan to add Affected Occupations, Trainees, Invoices, Documents and Comments.

Total Cost of Trainees

\$ 145.00

Trainees

Affected Occupation	Training Period Begin Date	Six Month Retention Date	Wage at Start of Training	Wage at Completion of Training	Training Cost for Employee	
Training Plan Test-Davy - Accountants and Auditors	2/4/2021	8/4/2021	\$3.00	\$4.00	\$45	+ Create
Training Plan Test-Davy - Accountants and Auditors	2/10/2021	8/10/2021	\$13.00	\$15.00	\$100	

- 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.**
 - Completed means the trainee has successfully finished the training
 - 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

The screenshot shows a web form titled "General" with a close button (x) in the top right corner. The form contains several fields for training information:

- Training Period Begin Date ***: 2/10/2021
- Wage at Start of Training ***: \$ 13.00
- Trainee Status ***: Enrolled (highlighted in yellow)
- Wage at Completion of Training ***: \$ 15.00
- Indiana resident ***: (dropdown menu)
- Training Cost for Employee ***: \$ 100
- Six Month Retention Date ***: 8/10/2021

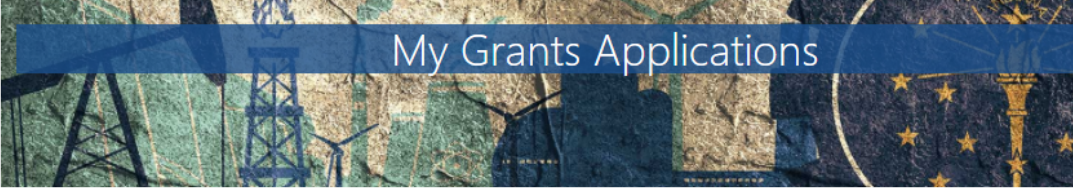
A red "Submit" button is located at the bottom of the form.

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)

My Grant Applications | **Financial Documents** | Invoices | Profile |

NextLevel Jobs > Business Services > My Grant Applications



My Grants Applications


Application Status:
Draft - Application has not been submitted by Applicant
Applied - Applicant has applied, but application is not yet assigned to DWD staff.
Assigned - Application has been assigned to DWD staff, but Applicant has not been contacted.
Contacted - DWD staff has contacted Applicant, waiting on final training plan.
Pending - DWD Staff and Applicant have finalized training plan, sent to DWD management for review
Agreement Sent to Employer - Agreement has been sent to the employer for signature.
Active - DWD Management has reviewed application and approved at least one training plan.
Closed - Application is no longer active
Idle - No contact in the last 30 days or employer is not ready to proceed with their application.
Denial - Employer will not be approved, regardless of training plan.

Created On ↓	Grant Applicant ID	Application Status	Owner	Company Industry Sector ↑	Total Agree Amount
7/7/2021 1:10 PM	1968	Active	Kenneth Kincy	Health and Life Sciences	100000

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

My Grant Applications | Financial Documents | Invoices | Profile |

NextLevel Jobs > Business Services > Financial Documents List



Financial Documents List

Document Type	Last Received ↓
W-9	12/7/2021 12:38 PM
Direct Deposit	12/7/2021 12:37 PM
Other	11/2/2021 11:43 AM

- 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

My Grant Applications | Financial Documents | Invoices | Profile |

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 | Invoices

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.

My Grant Applications | Financial Documents | Invoices | Profile | Calvin Broadus ▾

NextLevel Jobs > Business Services > My Grant Applications

My Grants Applications

Application Status:
Draft - Application has not been submitted by Applicant.
Applied - Applicant has applied, but application is not yet assigned to DVD staff.
Assigned - Application has been assigned to DVD staff, but Applicant has not been contacted.
Contacted - DVD staff has contacted Applicant, waiting on final training plan.
Pending - DVD Staff and Applicant have finalized training plan, sent to DVD management for review.
Agreement Sent to Employer - Agreement has been sent to the employer for signature.
Active - DVD Management has reviewed application and approved at least one training plan.
Closed - Application is no longer active.
Idle - No contact in the last 30 days or employer is not ready to proceed with their application.
Denial - Employer will not be approved, regardless of training plan.

Created On ↓	Grant Applicant ID	Application Status	Owner	Company Industry Sector ↑	Total Agreement Amount
5/28/2021 12:21 PM	1919	Active	1-DVD-Ingage Service Account	IT/Business Services	2200

- 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.

My Grant Applications | Financial Documents | Invoices | Profile | Calvin Broadus ▾

General | **Training Plan** | Comments

+Create

Training Plan Status ↑	Training Plan Name	Grant Period	Average Hourly Wage	Total Trainees	Total Training Plan Amount	Remaining Reimbursement	Agreement Start Date	Agreement End Date	
Active	Training Plan Test-Davy	5.0	14.00	6	1800	1800	2/3/2021	11/3/2021	▼
Active	Training test 3	5.0	17.00	4	400	400	8/27/2021	5/27/2022	▼
Draft	CAD operator	5.0	39.00	5	5000	5000			▼
Submitted	Training Material Test	5.0	20.00	2	200	200			▼

Submit

- 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.

My Grant Applications | Financial Documents | Invoices | Profile

Edit

General | Affected Occupations | Documents | **Trainees** | Invoice | Comments

Use the tabs at the top of this form to move between sections of the Training Plan to add Affected Occupations, Trainees, Invoices, Documents and Comments.

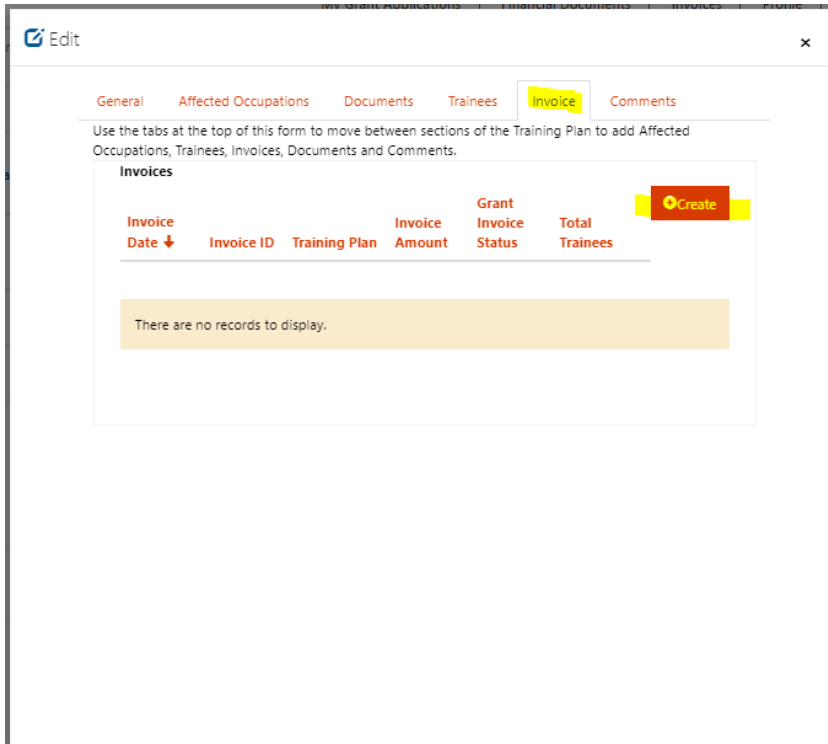
Total Cost of Trainees

\$ 145.00

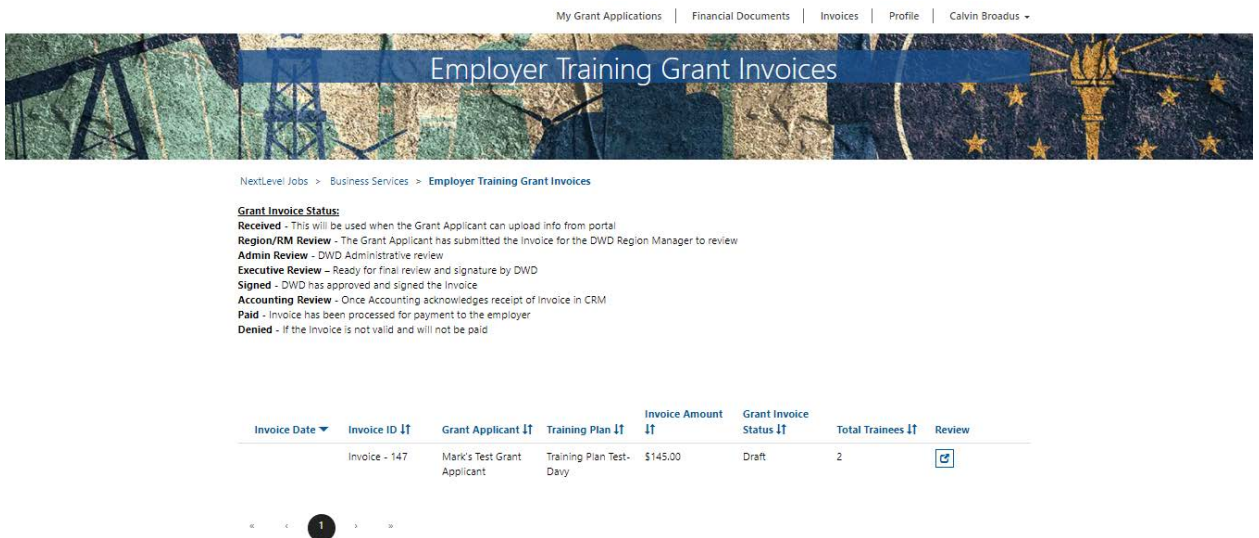
Trainees Create

Person	Trainee Status	Last 4 of SSN (Person)	Date of Birth (Person)	Hire Date	Employment	Affected Occupatic
Aaron Floyd	Completed	0000	3/14/1981	8/17/2021	New Hire	Training Plan Test-Davy - Accountar and Auditors
Kenny Rogers	Completed			8/27/2021	New Hire	Training Plan Test-Davy - Accountar and Auditors

- 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.

My Grant Applications | Financial Documents | **Invoices** | Profile | Calvin Broadus -

Employer Training Grant Invoices

NextLevel Jobs > Business Services > Employer Training Grant Invoices

Grant Invoice Status:
Received - This will be used when the Grant Applicant can upload info from portal
Region/RM Review - The Grant Applicant has submitted the invoice for the DWD Region Manager to review
Admin Review - DWD Administrative review
Executive Review - Ready for final review and signature by DWD
Signed - DWD has approved and signed the Invoice
Accounting Review - Once Accounting acknowledges receipt of Invoice in CRM
Paid - Invoice has been processed for payment to the employer
Denied - If the Invoice is not valid and will not be paid

Invoice Date	Invoice ID	Grant Applicant	Training Plan	Invoice Amount	Grant Invoice Status	Total Trainees	Review
12/2/2021	Invoice - 97	Mark's Test Grant Applicant	Training Plan Test-Davy	\$100.00	Submitted	1	
12/2/2021	Invoice - 96	Mark's Test Grant Applicant	Training Plan Test-Davy	\$45.00	Submitted	1	
	Invoice - 145	Mark's Test Grant Applicant	Training test 3		Draft	1	

- 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'.

General **Training Plan** Comments

My Grant Applications | Financial Documents | Invoices | Profile | Calvin Broadus -

+Create

Training Plan Status	Training Plan Name	Grant Period	Average Hourly Wage	Total Trainees	Total Training Plan Amount	Remaining Reimbursement	Agreement Start Date	Agreement End Date
Active	Training Plan Test-Davy	5.0	14.00	8	1800	1800	2/9/2021	11/9/2021
Active	Training test 3	5.0	17.00	4	400	400	8/27/2021	9/27/2022
Draft	CAD operator	5.0	39.00	5	9000	9000		
Submitted	Training Material Test	5.0	20.00	2	200	200		

Submit

- Go to the 'Invoice' tab and navigate to the invoice of your choosing by selecting the down arrow and choosing 'edit'.

Edit

General **Invoice** Comments

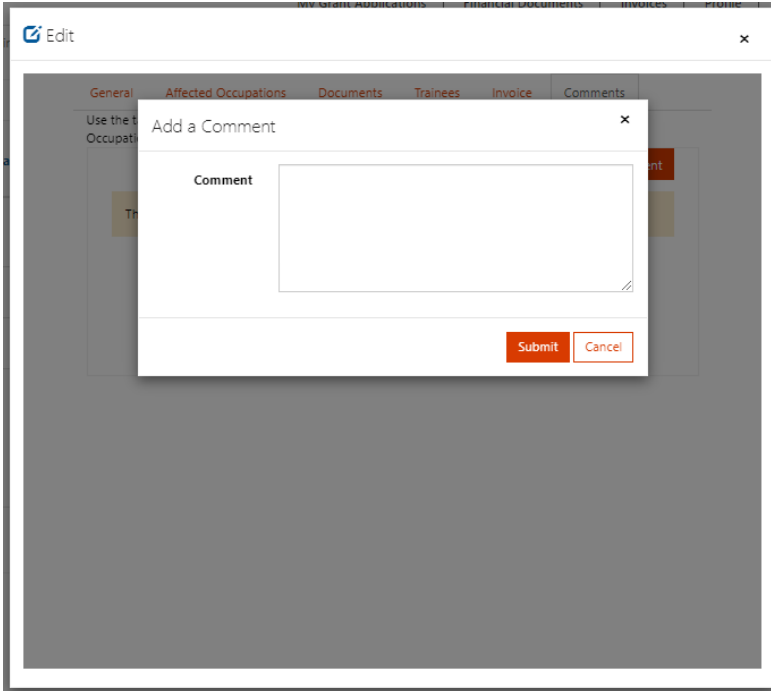
Use the tabs at the top of this form to move between sections of the Training Plan to add Affected Occupations, Trainees, Invoices, Documents and Comments.

Invoices

Invoice Date	Invoice ID	Training Plan	Invoice Amount	Grant Invoice Status	Total Trainees
12/2/2021	Invoice - 97	Training Plan Test-Davy	100	Submitted	1
12/2/2021	Invoice - 96	Training Plan Test-Davy	45	Submitted	1
11/1/2021	Invoice - 110	Training Plan Test-Davy		Submitted	15

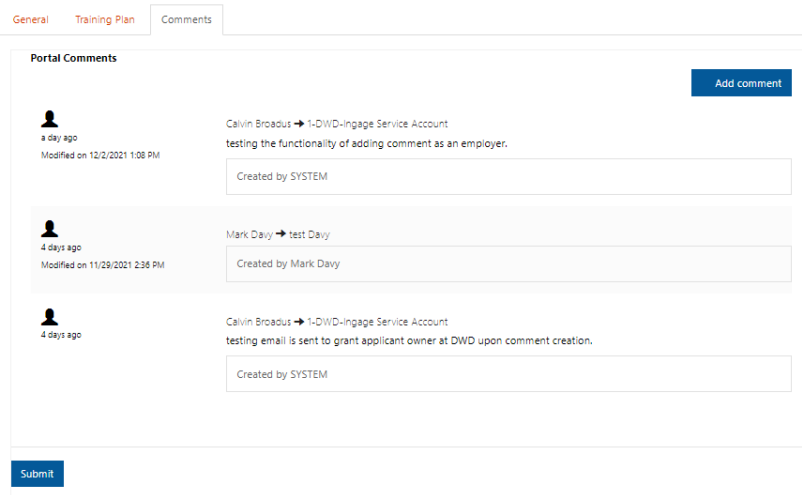
Comments

- 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.



The screenshot shows a web application window titled 'Edit' with a close button. The main content area has a tabbed interface with 'Comments' selected. A modal dialog box titled 'Add a Comment' is open, featuring a text input field labeled 'Comment' and two buttons at the bottom: 'Submit' and 'Cancel'.

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



The screenshot displays the 'Portal Comments' section of the application. It includes a navigation bar with 'General', 'Training Plan', and 'Comments' tabs. A blue 'Add comment' button is located in the top right. The main area lists three comments:

- Comment 1:** User: Calvin Broadus → 1-DWD-Ingage Service Account. Text: "testing the functionality of adding comment as an employer." Modified on 12/2/2021 1:08 PM. Created by SYSTEM.
- Comment 2:** User: Mark Davy → test Davy. Text: "Created by Mark Davy". Modified on 11/29/2021 2:38 PM. Created by Mark Davy.
- Comment 3:** User: Calvin Broadus → 1-DWD-Ingage Service Account. Text: "testing email is sent to grant applicant owner at DWD upon comment creation." Modified on 11/29/2021 2:38 PM. Created by SYSTEM.

A blue 'Submit' button is located at the bottom left of the page.