

Short-term workforce training through Maine's community colleges



# **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**':

4. Access Resources https://www.mccs.m	<ol> <li>Access resources and opdates. For the latest morthalion on submitting requests, processes, and resources, please visit https://www.mccs.me.edu/workforce-training/grant-funded-training/.</li> </ol>							
Need Assista	ance?							
If you have any queries or	need further in	formation durir	ng this period, feel free to co	ntact us at mccsalfondtraining@mair	necc.edu. Our team is here to assist you.			
We look forward to working	g with you!							
🗮 Active Compact Appl	ications <del>-</del>				Apply for Compact Membership			
Organization Name	City	Zip	Applying Contact	Workforce Development Coordinator	Status Reason Created On 🕹	•		
			You don't have permis	sions to view these records.				
<u>Contact Us</u>   <u>mccsalfondtra</u> Copyright © 2025 Maine C	Contact Us   mccsalfondtraining@mainecc.edu   207.629.4000       Maine Community College System         Copyright © 2025 Maine Community College System. All rights reserved.       323 State Street							

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:

ph Maine's community colleges				🔒 🕴 Become a Compact Member 🕴 About Us 🔰 Sign in	
	🞝 Sign in	Register	Redeem invitation		
	Sign up with	an invitatio	on code		
	* Invitatio	n code			
			have an existing account		
		R	egister		

## **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).

Compact Membership	Application
o o inpact morns of onip i	, pproduction
Contact Information Organization Information Poin	its of Contact
First Name *	Last Name *
Phone Number *	Phone Extension
Provide a telephone number	
Email *	Job Title *
lauren.polte+1@rsmus.com	

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

## **Organization Information**

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

	ennersnip	o Application
ontact Information 🖌	Organization Information	Points of Contact
ganization Inforn	nation	
Organization Name *		
Remove ALL punctuation a	ind special characters (e.g.	۱, replace '&' with 'and')
Website		
What is your organizatio	n ? *	

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

#### Functionalities to note:

- "What is your organization?  $\rightarrow$ 
  - 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"
    - •
  - Association
    - "Are you a sole proprietor or business?"
      - Sole Proprietor  $\rightarrow$  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.

Home > Become a Compact	t Member > Compact Membe	ership Application	
Compact M	embership	Applicatio	on
Contact Information 🖌	Organization Information 🖌	Points of Contact	
Applying Contact			
Lauren Testing (Do not use	e) Test		
Business Point of C The primary contact for your or Community College System.	Contact rganization who will serve as th	ne main liaison with the H	Harold Alfond Center for the Advancement of Maine's Workforce and the Main
I am the Business Point	of Contact *		
● NO ○ Yes First Name *			Last Name *
Phone *			Email *
Provide a telephone nun	nber		
			L.
Title *			

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

← 🖆 🔚 Save	🖆 Save & Close 🕂 New 🔊	Flow $\checkmark$ st Send Report For	Signa ∨ ೂ⊅ Request Sig	natures 🗸				
New Compact Ap	pplication - Unsaved					Active Draft Status Status Reason	RSM US Grant Management System Admin Account Workforce Development Coordinator	t v
Organization Name	•					Points of Contact		
Business Description	*					Applying Contact		Q
						Business Point of Contact		Q
Website						Authorized Signer		Q
Organization Category	* Business/ Municipality	~	Are you a Sole Proprietor * or Business?	Business	~	Finance Contact		Q
EIN	*		NAICS Code		Q			
Part of DoD Contract?	* No	~				Associated Organization		
Social Security Number	<sup>⊕</sup> No					Account 🖄		
Today Date						Application Denial		
Members/Employees						Deny Application	No	~
Number of full-time empl	loyees "	Number of part-time employee	s <b>*</b>	Number of seasonal employees *		Denial Reason		

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):

New Compact Application - Unsaved		Active Draft Status Status Reason Workforce Development Coordinator
General W9 MOA		
Organization Name *		Points of Contact
Business Description *		Applying Contact
		Business Point of Contact * Recent Contacts All records
Website		Authorized Signer
Organization Category Business/ Municipality V	Are you a Sole Proprietor * Business V	Finance Contact
EIN *	NAICS Code ,	印刷 Julie Slade
Part of DoD Contract? • No ~		Associated Organization [2] Eric Small
Social Security Number 🖞 No Entered		Account d + New Contact

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.** 

Neuc									
Home	Information: New Contact							⊠ ×	
Recent	🖙 📓 Save 👹 Save 8	k Close $+$ New $\Diamond$ Lists and segments $\lor$ Degree	Planning 🔊 Flow 🗸	$_{s}\!$					nt 🗸
Pinned	New Contact				 Email	Any Preferred Method of Contact	RSM US Grant Management System Admin Account Owner	~	
Dashboard	General Timeline De	ocuments Projects Funding Usage							
inding Requi	General Contact Information	n				Home Address			م
Training Pa Project Ck	First Name		Last Name	•		Street 1	•		م
	Alternate First Name		Middle Name	***		Street 2			م م
Compact /	Email		Alternate Last Name (Maiden/Other)			City	•		Q
Accounts	User Name 🖉		Employed?	- No	~	State	•		
Contacts	Suffix		Company		Q	ZIP Code	*		
	Phone Number		Phone Extension			Secondany Address			
	Alternate Phone	***	Date of Birth			,			
	Job Title		Gender	·	~	Address Type		~	~
	Ethnicity	V	Social Security Number	۵		Street 1		- 1	
	Race		Entered			Street 2			

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*.

← 📄 🖾 🔚 Save 📽 Save & Close	+ New 🗋 Deactivate 🗎 Delete 🖒 Refresh 🖧 Assign	➢ Flow ∨ Ø Send Report For Signa ∨	・ 約 Request Signatures > 🚺 Run	n Report V 📑 Documents Core Pack	🖄 Share 🗸
Lauren Tests (Do not use) - Saved Compact Application General W9 MOA Related V				Active Draft Status Status Reason Workforce Development	ine V Coordinator
W9			+ New $\sim$	↑ Upload  ↑ Upload  ↑ Open L  ↓  ↓  ↓  ↓  ↓  ↓  ↓  ↓  ↓  ↓  ↓  ↓  ↓	ocation $\checkmark$ ;
Name ~	$Path \uparrow \curlyvee$	Modified ~	Modified by ~	Created On SharePoint ~	
		No data available			

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

$\leftarrow$ $\square'$ $\blacksquare$ Save & Close + New $\supseteq$ Flow $\lor$ $\mathscr{A}$ Send Report For Signa $\lor$ $\mathscr{A}$ Request Signatures $\lor$	
New Compact Application	Active Draft RSM US Grant Management System Admin Account V Status Status Reason By Workforce Development Coordinator
General W9 MOA	

#### 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**'.

← □ 🖬 Save 👹 Save & Close + New 🖄 Flow ∨ 🛷 Send Report For Signa ∨	🧀 Request Signatures 🗸		
New Compact Application - Unsaved	Send With Compact Application MOA New Agreement	Active Draft Status Status Reason By Workforce Development Coordinator	~
General W9 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.

Read-only This record's status: Inactive		
E C + New C Activate Delete C Refresh A, Assign D Flow V #D Send Report For Signa V #D Request Signatures V II Run Report V	Documents Core Pack	[윤 Share ~
Town of Kennebunk - saved Compact Application	Inactive Si Status Sta	atus Reason Workforce Development Coordinator
General M3 mOA heaten -	700 Hite 0	Iown Manager
	Finance Contact * 🛛	Kayla Tierney
	First Name 📩 🖞	Kayla
	Last Name *	Tierney
	Phone Extension 🗅	(207) 604-1327
	Email 🔭 🗈	ktierney@kennebunkmaine.us
	Job Title 🔭 🗅	Finance Director
	Associated Organization	
	Account	Town of Kennebunk
	Application Danial	
	Application Denial	
	Deny Application N	0
	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**:

≡	← E Focused	i view 🖾 Show Chart 🥖	Edit 🖪 Activate 🗋	Deactivate 📋 Delete   🗸	Create Document 🖧 Assign 🗄	🖻 Share 🛛 🖏 Email a l	Link   ~ 🔊 Flow ~	🔳 Run Report 🗸	🖻 Share
Recent      V	Active Comp	pact Applications* ~					Edit colum	ns 🍸 Edit filters 🔎	Filter by keyword
✓ Pinned ∨ Dashboards	Organiza	ation Name ▼~ City ~	ZIP/Po ~	Business Point of Contact ~	Workforce Development Coordinat ~	EIN ~	NAICS Code ~	Status Reason ~	Created On ↓ ~
券 Dashboards	Nvidia	ahem	dabad 44563	RSM Admin	P # Portals-MCCS GMS Dev Portal	45637	Wholesale Trade	Submitted	1/16/2025 7:04 AM
Projects	Nvidia 2	fs	44563	RSM Admin	P # Portals-MCCS GMS Dev Portal	45637	Utilities	Submitted	1/16/2025 6:06 AM
Projects									
Budget Items									
Partners									
Compact Applications									
Accounts									
𝒫 Contacts									
P Projects	Rows: 2 Selecter	d: 1							

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.

💠 Reach 🐴 💷	lpskill Maine			Search				SANE	DBOX 🛛	+ © ? © <
≡ ŵ Home	e	Pocused view 🖾 Show Ch	irt 🥒 Edit 🖪	Activate 🗋	Deactivate 📋 Delete 🗸 🗸	Create Document 🔍 Assign B	🕈 Share 🛛 🕅 En	nail a Link 🛛 🗡 🔊 Flow	∽ 🗐 Run Report →	: Bare v
<ul> <li>G Recent ✓</li> <li>         ✓     </li> <li>         ✓     </li> <li>         Pinned ✓     </li> </ul>	Acti	ve Compact Application	s* ~					Edit co	lumns 🛛 Edit filters	P Filter by keyword
Dashboards		Organization Name <b>T</b> ~	City ~	ZIP/Po ~	Business Point of Contact ~	Workforce Development Coordinat ~	EIN ~	NAICS Code ~	Status Reason ~	Created On ↓ ~
养 Dashboards		Nvidia	ahemdabad	44563	RSM.Admin	Portals-MCCS GMS Dev Portal	45637	Wholesale Trade	Submitted	1/16/2025 7:04 AM
Projects		Nvidia 2	fs	44563	RSM Admin	# Portals-MCCS GMS Dev Portal	45637	Utilities	Submitted	1/16/2025 6:06 AM
Projects					Assign Compa	ct Application $ imes$				
Budget Items					You have selected 1 0 you like to assign it?	Compact Application. To whom would				
Partners					Assign to	Me $\vee$				
Compact Applications					User or team					
Accounts										
, ,						Assign Cancel				
Projects O	Rows	2 Selected: 1								

## **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**:

🍀 Reach ^ 🗌	Upskill Maine	✓ Search			SAND	BOX ♀ + ◎	? & & Ru
=	← 😬 Focused view 🖾 Show Chart + New	ÎÎ Delete ∨ Č) Refresh	Visualize this view 🔄 Email a Link	✓ ≫ Flow ✓	I Run Report ∨ I Excel Templat	ies V :	🙆 Share 🗸
☆ Home							
🕚 Recent 🗸 🗸					_	-	
🖈 Pinned 🗸	Active Compact Members* ~				Edit colu	imns Y Edit filters	X
Dashboards	Organization Name ~	Number of Employees/Members ~	Compact Membership Start Date $\vee$	EIN ~	NAICS Code ~	Workforce Development Coordinator	·
# Dashboards	RSM		1/28/2025	1111222243123	Agriculture, Forestry, Fishing and	RSM US Grant Management System	Admin Acc
Projects	RSM	1.000	1/24/2025	123	Construction	RSM US Grant Management System	Admin Acc
Projects	RSM	100	1/20/2025	456789	Mining, Quarrying, and Oil and G	P # Portals-MCCS GMS Dev Portal	
Budget Items							
Partners							
Compact Applications							
Accounts							
A Contacts							
P Projects	Rows: 3						

- 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".

🏽 Reach 🐴 🗆 📭	skill Maine	₽ Search			SAND	BOX 🛛 +	9)? @ \$
Home Recent Pinned hboards	C     II     III     Save @ Save &       RSM Test Co - Saved       Compact Application       General     W9     MOA       Related >	Close 🕂 New 🗋 Deactivate 🗎 Delete 🖒 Ref	resh ని, Assign 🕺 Row 🗸 🕫 Send Ru	eport For Signa	<ul> <li> <i>P</i> Request Signatures         Send With         G Compact Application         Statia         G New Agreement     </li> </ul>	n MOA	E Share ←
Dashboards	Organization Name * RSM Test Co				Points of Contact		
Projects	EIN 1234567	NAICS Code	* S Agriculture. Forestry. Fishing and H	lunt × P	Business Point of Contact	* 🖾 Sam Stern ×	٩
Budget Items	Organization Category Business/ Me	nicipality 🗸 Part of DoD Contrac		~	First Name	° 🗇 Sam	
ners	Business Description * Example des	cription			Last Name	*  Stern	
Compact Appleations					Phone Number	* 1234567899	C
Accounts	Website				Email	* 🗇 sam.stern@rsmus.com	
Contacts	Social Security Number	Are you an Individua Business?	l or a * Individual	$\sim$	Title	* 🗇 Supervisor	
	Social Security Number 🖄 No				Authorized Signer		Q
	Littered				Finance Contact		Q
	Members/Employees						
	Number of full-time employees	Number of part-time employees	Number of seasonal employees		Associated Organization		
					Account	۵	
Projects 🗘	Business and/or Headquarters Address				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						
←   E	다 🕂 New 🖪 Activate 🛍 Dele	ete 🖔 Refresh 🛛 Å, Assign	≫ Flow ∨ #Ø S	end Report For Signa	✓ Ø Request Signat	ures \vee 🔳 Rur	in Report \vee 🗋 Documents Core Pack 😢 Shar
Waldo Compact A General	County Soil and Water Conserv pplication W9 MOA Related ~	ration District - Saved				<b>Ina</b> Stat	Active Approved Christopher Allen Young Status Reason Workforce Development Coordinator
MOA Agre	ments						🖒 Refresh 🛛 🖉 Flow 🗸 🎕 Excel Templates 🗸
	Name 🗸	Agreement Status ~	Sent On $\downarrow \lor$	Signed On 🗸	Owner ~	Created On $\checkmark$	Parent Y Parent Y Parent Y Parent I Y
	Compact Membership MOA	OUT FOR SIGNATURE	2/26/2025 7:40 PM		Edward Wright (	2/26/2025 7:4	

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.

eral W9 MOA Kelated ~		us suitus keisom 📲 workierde bekelopment o	Coordinator
	ANV THE	Iown Manager	
	Finance Contact	* 🕅 <u>Kayla Tierney</u>	
	First Name	° ≙ Kayla	
	Last Name	් Tierney	
	Phone Number	° (207) 604-1327	
	Phone Extension	٥	
	Email	*      ktierney@kennebunkmaine.us	
	Job Title	· D Einsteine Director	

## 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.

FOR THE ADVANCEMENT OF MAINE'S WORKFORCE	unding Request   Lauren Polte -
Short-term workforce training through Maine's community colleges	Profile
Home > Compact Member Funding Request	Additional Contact Information Organization Management
Compact Member Funding Request	Sign out
2025 Funding Requests	
We will start accepting 2025 funding requests on Monday, December 30, 2024.	

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:

mary contact			Finance Co	ntact	
Lauren Polte		<b>x</b> Q			٩
Contracting Contact					
		۹			
Contacts					
contacts					• Create
First Name	Last Name		Role	Email	
		There are no	records to display.		
Organization Admins					
Organization Admins Full Name	Email			Job Title	
Drganization Admins Full Name Lauren Polte	Email lauren20@rsmus.co	m		Job Title Supervisor	
D <b>rganization Admins</b> Full Name Lauren Polte	Email lauren20@rsmus.co	m		Job Title Supervisor	
Organization Admins Full Name Lauren Polte	Email lauren20@rsmus.co	m		Job Title Supervisor	
Organization Admins Full Name Lauren Polte	Email lauren20@rsmus.co	m		Job Title Supervisor	
Organization Admins Full Name Lauren Polte Program Contact Full Name	Email lauren20@rsmus.co Email	m		Job Title Supervisor Job Title	
Organization Admins Full Name Lauren Polte Program Contact Full Name	Email lauren20@rsmus.co Email	m		Job Title Supervisor Job Title	
Organization Admins Full Name Lauren Polte Program Contact Full Name	Email lauren20@rsmus.co Email	m There are no	records to display.	Job Title Supervisor Job Title	
Organization Admins Full Name Lauren Polte Program Contact Full Name	Email lauren20@rsmus.co Email	m There are no	records to display.	Job Title Supervisor Job Title	

## 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:

←   {	B Focused view 🕼 Show Chart 🕂	- New 📋 Delete	∨ Č Refresh	🤞 Visualize this view 🛛 🐯 Email a Link	$^{\vee}$ $$ $$ $$ $$ $$ $$ $$ Flow $^{\vee}$	🖩 Run Report \vee	Excel Templates	Export to Excel	Import from Exce	I   ∨ : È Share ∨
Activ	e Compact Members $\vee$							07 E	dit columns 🛛 🍸 Edit fil	ers Filter by keyword
	Organization Name ~	BI-Code ~	County ~	Number of Employees/Members ~	Compact Membership	Start Date ~	EIN ~ N	IAICS Code ~	Workforce Develop	Apply begins with filter on these columns: Account Number
	Associated General Contractors of	HA0004		185	10/1/2021		c	Construction	😡 Niki Woodhous	City Donor ID Number Email
	Delta Ambulance	HA0020		0	10/1/2021		F	lealth Care and Social Assistance	🐼 Diane E Crocket	Main Phone Organization Name
	IntWork	HA0030		0	10/1/2021		F	rofessional, Scientific, and Tech.	Edward Wright	Other Phone State

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:

	🖺 Focused view 🛛	Show Chart	🖉 Edit 🖪	Activate	🔁 Deactivate	🗊 Delete	~ +	Merge	Create D	Document		~ ""А	Open org chart	+ Add to Marketing List	우, Assign	🔄 🖄 Share	•	کا ا	§ Share ∨
Activ	ve Compact Me	mbers* ~													📆 Ec	lit columns	√ Edit filters		×
<b>v</b>	Organization Name	~	BI-Code	~ (	County ~	Nur	nber of Em	nployees/M	1embers ~	Compact N	lembership Start Da	ate ~	EIN Y	NAICS Code ~		Worl	kforce Developm	nent Coordinator ~	
	Associated General	Contractors of	HA0004						185	10/1/2021				Construction		<b>N</b>	iki Woodhouse (a	Available)	

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

Active Compact Members	* 🗸					$\scriptstyle{\fbox{\ }}$ Edit columns $\scriptstyle{\bigtriangledown}$ Edit filters $\scriptstyle{\frown}$ general $\scriptstyle{\longleftarrow}$
Organization Name ~	BI-Code ~ C	County ~ Number of Employees/Members ~	Compact Membership Start Date ~	EIN ~	NAICS Code ~	Workforce Development Coordinator $\sim$
General Dynamics Bath Iron V	Works HA0024	0	10/1/2021		Manufacturing	Maureen O'Brien (Available)
General Electric GE Gas Powe	r Bangor HA0732	0	10/19/2022		Manufacturing	Christopher Allen Young (Away)

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

Activ	e Compact Members* 🗸						📆 Edit c	olumns 🛛 Edit filters 📿 *general 🛛 🗙
	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	Wiki 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	w Niki Woodhouse (Available)
	General Electric GE Gas Power Bangor	HA0732		0	10/19/2022		Manufacturing	R 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.

ill Maine			P Search							Ŷ	+ 🎯	?	\$
← 🛛 🖾 🖉 🖬 Sav	e 👹 Save & Close 🦻	월 Quick Connect $~~+$	New 🔀 Giving 🗸 🐒	🎗 Candid Update 🛛 🔵 Send	survey 🕁 Follow	☆ Charity Ch	eck gb Open org chart	🗋 Deactivate 🗧	r Update Giving Societies			e	Share
AG Associated G	eneral Contractor	s of Maine - Saved							N	Niki Woo Workforce	dhouse Development (	Coordinator	
Summary Compact M Basic Information	embership Contacts	Projects Disburseme	nt Requests Document	ts Training Vendor Re	ated Account Rel	ated ~	Business Address						
Organization Name	Associated General Cor	ntractors of Maine					Line 1	188 Whitten R	bad				
EIN			NAICS Code	° ⊗ <u>Construction</u> ×		Q	Line 2						
Organization Category		~	BI-Code	© HA0004			City	Augusta					
W-9 Received	No	~	Social Security Number	ρ			State/Province	Maine					
Are you a Sole Proprietor or Business?		~					ZIP/Postal Code	04330					
Business Description	AGC Maine provides a	full range of services satisfying	g the needs and concerns of	its members, thereby improvir	g the quality of constru	uction	County						
	and protecting the pub	lic interest.					Main Phone	•					
website							Email	•					
Members/Employees							Headquarters outside of Maine?	No					`
Number of members	185	Number of part-time	0	Number of seasonal	0								
Number of full-time	0	coprojeco		comproyees									

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.

Up	skill Maine		, P Search			Quick Create: Conta	act	×
	← 🔲 🖬 🖬 sa	we 🎬 Save & Close 🦓 Quick Connect \vee 🕂 New 📆	g Giving \vee 🔥 Candid Update 🔹 💧 Send survi	ry 🕁 Follow 🏠 Charity C	heck 🏚 Open org chart 📑 Deactivate	First Name		
$\sim$	AG Associated	General Contractors of Maine - Saved				Last Name	•	
~	Account					Email	•	
	Summary Compact P	Membership Contacts Projects Disbursement Reques	ts Documents Iraining Vendor Related	Account Related ~		Job Title	·	
	Key Contacts			Organization Admins		Mobile Phone		
ns	Primary Contact	· 🕅 <u>Kelly Flagg</u> ×		Full Name ~	Email ~	Date of Birth		
5	MOA Signer			Kelly Flagg	kelly@agcmaine.org	Address 1: Street 1	188 Whitten Road	
	Finance Contact	· [2] <u>Andrea Jewell</u> ×		Andrea Jewell	andrea@agcmaine.org	Address 1: Street 2		
ins						City	Augusta	
115	Contacts		+ New Contact :	Rows: 2		ZIP/Postal Code	04330	
	🗌 🛛 Full Name î 🗠	Email ~	Job Title ~					
	Andrea Jewell	andrea@agcmaine.org	Finance and Operations M					
	Kelly Flagg	kelly@agcmaine.org	Executive Director					
	Rows: 2							
	Program Contacts		+ New Contact :					
	Full Name ~	Email ~	Job Title ~					
0							Save and Close	Cancel

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).

						Email	Preferr
General Timeline E	Documents Projects Funding Usag	e Related ∨	Company	Lauren Testing 2. (do not use) ×	٩	ZIP Code	• •••
Phone Number	* (123) 456-7890	¢	Phone Extension			Corondany Address	
Alternate Phone			Date of Birth			Secondary Address	
ob Title	Supervisor		Gender	•	~	Address Type	
thnicity		~	Social Security Number	≜ No		Street 1	
lace		~	Entered	0		Street 2	
Center Compact Member-	·		Social Security Number	6°		City	
81 Code			Student Number			State	
			Are you a veteran?	No	~	ZIP Code	
				+ New Contact O	rganiza	Description	

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

← 🗠 🖬 Sa	we 👹 Save & Close → New 🖄 Flow $\vee$ 🛷 Send Report For Signa	. •			
New Contact	Organization Role			RSM US Grant Management System Admin Account Owner	$\sim$
General					
First Name	www.fc	Role	***		~
Last Name		Email			
Organization	A Lauren Testing 2 (do not use) ×	,O Contact	A Lauren Polte ×		9
Created On	۵				

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*):

HAROLD ALFOND CENTER FOR THE ADVANCEMENT OF MAINE'S WORKFORCE Boot term workforce braining through Maine's community colleges	A Become a Compact Member   Compact Member Funding Request   Lauren Polte → Compact Member Funding Request
Home	
Home	

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':

use delays in processing	approval emails.					-	-	
you have any questions o	or concerns, please fe	el free to reach out	to alfondtrainin	g@mccs.	me.edu.			
E Active Compact Mem	ber Funding Reques	÷					Арр	bly for Funding
fraining or Class Title	Organization	Application Contact	Start Date	End Date	Total Funding Request (Amount)	Approved Amount	Current Approval Step	Created On ↑

## **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.

Short-term workforce training through Maine's community colleges			
Home > Compact Member Funding Request > Compact Member Funding	ding		
Compact Member Funding			
Training Information Trainer Information Participants Attest	ation		
Organization *			
Lauren Cooks Co			
Training or Class Title *			
Intro to Cooking			
Remove ALL punctuation and special characters (e.g., replace '&' with	'and')		
Start Date *		End Date *	
2/24/2025	<b></b>	2/28/2025	=
Reminder-We cannot approve programs that started prior to the submi date.	ission	L	
Number of Employees to be Trained *		Number of Contact Hours *	
12		20	
		We want to include the correct amount of contact hours the employee being trained. If this is a credit class, please indicate the correct numb hours based on 15 hours per credit.	is per of
Is this funding request for a college credit class?*			
● No ○ Yes			
Is it a online training? *			
No. O Ves			

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 <u>calculated</u>
  - o 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:

nome - compact member	r Funding Request > Compact Member Funding
Compact M	lember 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 provide Training Provider Type	ed by a third-party training vendor (not by one of Maine's Community Colleges), please review the list of our third party training partners.
If the training is being provide Training Provider Type Select	ed by a third-party training vendor (not by one of Maine's Community Colleges), please review the list of our third party training partners.
If the training is being provide Training Provider Type Select Select	ed by a third-party training vendor (not by one of Maine's Community Colleges), please review the list of our third party training partners.
If the training is being provide Training Provider Type Select Select Maine Community Col	ed by a third-party training vendor (not by one of Maine's Community Colleges), please review the list of our third party training partners.
If the training is being provid Training Provider Type Select Select Maine Community Col Other Training Vendor	ed by a third-party training vendor (not by one of Maine's Community Colleges), please review the list of our third party training partners.

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

#### Training Provider Type = Maine Community College

Home > Compact wember Funding Request >	Compact Membe	r Funding		
Compact Member	Fundin	g		
Training Information	Participants	Attestation		
Please provide us with WHO is providing the traini	ng as the training	rendor and not the HOST of the training.		
If the training is being provided by a third-party trai Training Provider Type *	ning vendor (not b	/ one of Maine's Community Colleges), p	lease review the list of our third party tra	ining partne
Maine Community College				
Maine Community College *				

#### **Other Training Vendor:**

Compact Member Funding	
compact member r unung	
Training Information  Trainer Information Participants Attes	station
Please provide us with WHO is providing the training as the training vendor a	and not the HOST of the training.
the training is being provided by a third-party training vendor (not by one of Training Provider Type *	f Maine's Community Colleges), please review the list of our third party training partners.
Other Training Vendor	*
1EdTech	•
1EdTech	City
1EdTech Address : Line 1 1EdTech	City Lake Mary
1EdTech Address : Line 1 1EdTech Address : Line 2	City Lake Mary ZIP/Postal Code
1EdTech Address : Line 1 1EdTech Address : Line 2 801 Intenational Parkway 5th Floor, PMB #12	City Lake Mary ZIP/Postal Code 32746
1EdTech Address : Line 1 1EdTech Address : Line 2 801 Intenational Parkway 5th Floor, PMB #12 Primary Contact	City Lake Mary ZIP/Postal Code 32746 Email events@1edtech.org
1EdTech Address : Line 1 1EdTech Address : Line 2 801 Intenational Parkway 5th Floor, PMB #12 Primary Contact	City Lake Mary ZIP/Postal Code 32746 Email events@tedtech.org Main Phone
1EdTech         Address : Line 1         1EdTech         Address : Line 2         801 Intenational Parkway 5th Floor, PMB #12         Primary Contact         —         EIN	City Lake Mary ZIP/Postal Code 32746 Email events@tettech.org Main Phone 4073627783
1EdTech Address : Line 1 1EdTech Address : Line 2 801 Intenational Parkway 5th Floor, PMB #12 Primary Contact  EIN	City Lake Mary ZIP/Postal Code 32746 Email events@1edtech.org Main Phone 4073627783
1EdTech         Address : Line 1         1EdTech         Address : Line 2         801 Intenational Parkway 5th Floor, PMB #12         Primary Contact         -         EIN         -         Does your training vendor appear in the drop down?*	City Lake Mary ZIP/Postal Code 32746 Email events@1edtech.org Main Phone 4073627783

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:

	Participants Attestation
Please provide us with WHO is providing the training	g as the training vendor and not the HOST of the training.
If the training is being provided by a third-party trainin Training Provider Type *	ng vendor (not by one of Maine's Community Colleges), please review the list of our third party training partne
Other Training Vendor	
No	
Does your training vendor appear in the drop	) down?*
vendor name "	Provide a telephone number
Vendor Email *	Vendor Website
Vendor Address Line 1 *	Vendor Address Line 2
	Vendor State *
Vendor City *	

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:

-				
Compac	t Membe	r Funding		
Training Information	<ul> <li>Trainer Informa</li> </ul>	tion 🖌 Participants Attestation	n	
Please utilize this temp participants may take a	late to upload a list of y few minutes to appear	our training participants. The file must to in the 'List of Participants' grid—refrest	be in .xlsx format, and you may rena h the page as needed; your data wil	me it as needed before uploading. Uploaded I not be lost.
To add participants mai	nually, click the 'Add Pa	rticipant' button below. The 'List of Part	icipants' grid will display both manu	ally entered and uploaded participants. Please
Upload the list of	participants by clickin	ng on "Add Files" Button		
				● Add files
		There are no folde	rs or files to display.	
List of Participant	s			
List of Participant	5			Add Participant
List of Participant First Name	s Last Name	Current Funding Usage	Amount Requested	Add Participant Points of Light Provided
List of Participant	s Last Name	Current Funding Usage	Amount Requested	Add Participant Points of Light Provided
List of Participant First Name	s Last Name	Current Funding Usage There are no re	Amount Requested	Add Participant
List of Participant First Name	s Last Name	Current Funding Usage There are no re	Amount Requested	Add Participant Points of Light Provided
List of Participant First Name	s Last Name	Current Funding Usage There are no re	Amount Requested	Add Participant Points of Light Provided

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:

	Nember I	-unding		
I raining Information 🖌	I rainer Information	Participants Attestation	n	
ease utilize this templat rticipants may take a fe	e to upload a list of your to w minutes to appear in th	raining participants. The file must e 'List of Participants' grid—refres	be in .xlsx format, and you may rena th the page as needed; your data wil	ame it as needed before uploading. Uploaded I not be lost.
add participants manu ow a few minutes for al	ally, click the 'Add Particip I participant details to pop	ant' button below. The 'List of Par ulate.	ticipants' grid will display both manu	ally entered and uploaded participants. Please
Upload the list of pa	rticipants by clicking or	"Add Files" Button		
				• Add files
Name 🕇			Modified	
Participant Upload	d Template (20).xlsx (18 Ke	3)	2/19/2025	7:29 AM
Upload Status				
Upload Completed				
List of Participants				
				Add Participant
		Current Funding Usage	Amount Requested	Points of Light Provided
First Name	Last Name			No
First Name Madison	Last Name Trent	\$0.00	\$60.00	140
First Name Madison Mary Kate	Last Name Trent Short	\$0.00 \$0.00	\$60.00 \$60.00	No
First Name Madison Mary Kate	Last Name Trent Short	\$0.00 \$0.00	\$60.00 \$60.00	No

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.

Eiret Namo	Last Namo	Current Funding Heado	Amount Paguagtad	Points of Light Provided
Madison	Trent	\$0.00	\$60.00	No
Mary Kate	Short	\$0.00	\$60.00	No

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:

E Active Compact Mem	I≣ 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 <b>↑</b>
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 of E Active Compact Mem	or concerns, please for the Funding Reques	eel free to reach o	ut to alfondtrair	ning@mccs.	me.edu.			Apply for Fund	ng
Training or Class Title	Organization	Application Contact	Start Date	End Date	Requested Amount	Approved Amount	Current Approval Step	Created On <b>↑</b>	
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	▼ View
Contact Us   <u>mccsalfondtra</u>	aining@mainecc.edu	207.629.4000					Maine Commi 323 State Stre	unity College Sy eet	Withdraw Application Amendment Request

## **View Request**

A read-only version of your funding request:

Training Information Traine	er Information Participants	Attestation
Organization		Program Title *
Lauren Cooks Co		Intro to Cooking
Start Date *		End Date *
2/24/2025		2/28/2025
Number of Employees to be Train	ned *	Number of Hours *
12		20
Retail Price per Frontline Worker	*	Total Funding Request (Amount) *
\$100.00		\$1,200.00
Request a 10% Admin Reimburse No  Yes	ement Rate *	This training cost is at a flat rate regardless of the number of atten $^{*}$ $_{\odot}$ No $~\odot$ Yes
Brief description of the course		How will training enhance employee growth?
test		test

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

Training or Class Title *		Start Date *	End Date *	
Intro to Cooking		2/24/2025	2/28/2025	
Requested Start Date		Requested End Date		
M/D/YYYY	<b></b>	M/D/YYYY	<b></b>	
Amendment Information				
List of Participants				
List of Participants				Add Particip
List of Participants First Name	Last Name	Email	Amendment Request	Add Particip
List of Participants First Name Madison	Last Name Trent	Email maddie.trent@gmail.	Amendment Request	Add Particip

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:

List of Participants				Add Participant
First Name	Last Name	Email	Amendment Request	
Madison	Trent	maddie.trent@gma	il.com	
Mary Kate	Short	mkatherine@gmail.	om	Remove Participant

AROLD ALFOND CENTER OR THE ADVANCEMENT IAINE'S Amendm	ent Request		×	Lauren Polte -
Compac	First Name *	Last Name *		
end	Alternative First Name	Email *		
iing or Cla to Cookin <u>c</u>	Date of Birth M/D/YYYY	Job Title *		
ested Sta	Suffix	Amendment Request Added		
ndment in	Submit			

#### **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 o	or concerns, please fe	el free to reach ou	t to alfondtrai	ning@mccs.r	ne.edu.			Apply for Fund	ling
Training or Class Title	Organization	Application Contact	Start Date	End Date	Requested Amount	Approved Amount	Current Approval Step	Created On <b>↑</b>	
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	View
								_	Withdraw Application
Contact Us   mccsalfondtra	<u>ining@mainecc.edu</u>	207.629.4000					Maine Commu 323 State Stre	unity College Sj eet	Closeout Information

## Here you will enter the participant's training result:

ome > Compa	ct Member Funding Request	> Closeout Info	ormation		Compact Member Funding Request > Closeout Information									
Closeo	ut Informat	tion												
Training or C	lass Title *	Sta	art Date *	End D	)ate *									
Intro to Cookir	ng	2/2	4/2025	2/17/2	2/17/2025									
List of Partici	pants													
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		~							
Mary Kate Short	mkatherine@gmail.om	Waitress	\$0.00	No	\$60.00		<b>~</b>							

Submit

FOR THE ADV	ANCEMENT OF	
MAINE'S	Closeout Information	Lauren Polte -
Short-term workforce training thro		
	First Name *	
Home > Compac	Madison	
	Last Name *	
Closeou	Trent	
Tanining on Cla	Email *	
Training of Cia	maddie.trent@gmail.com	
intro to Cookin <u>c</u>	Budget Amount	
List of Particip	\$60.00	
	Points of Light Provided	ıt
Contact	◎ No ○ Yes	
Madison	Participant Result	~
Hent	Select 🗸	
Mary Kate Short		<b>~</b>
	Submit	
Qubmit		
Submit		
		_

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

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

🏽 Reach 🐴 🗆 🛛	oskill Maine	✓ Search	ତ + ଞ୍ ? ଏଚ ଓ (ଲ	Ð
=	← 円 Focused view 중 Show Chart + New Î D	e 🗸 🖒 Befreth 🚽 Visualize this view 🖾 Fmail a Link 🗸 💈	22 Flow ∨ III Run Report ∨ III Fyrel Templates ∨ :	ò
☆ Home				
$$ Recent $\checkmark$	Active Compact Member Funding Request		🔢 Edit columns 🕎 Edit filters 🔎 Filter by keyword	
🖈 Pinned 🗸 🗸	· · · · · · · · · · · · · · · · · · ·			
Dashboards	Training or Class Title ~ Organizatio	Application Contact $\checkmark$ Start Date $\checkmark$ End Date $\checkmark$ Tr	Fotal Funding Request Y Amount Obligated Y Current Approval Step Y Created 1 Y 🖸	
恭 Dashboards				
Funding Requests				
Funding Applications				
Training Participants				
Project Closeouts		++		

## Enter required information

🗰 Reach 🐴 🗆 up	oskill Maine		₽ Search				Ŷ	+ 🏽 ?	Ð \$	RU
≡ ŵ Home	← 🖾 🖬 Save 🔐	Save & Close + New ∑ Flow ∨ ∞ Send	Report For Signa 🗸							Ø
③ Recent ∨ ☆ Pinned ∨	New Project - Unsaved					Active Pendin Status Status R	g RSM US Grant Managemen	tt System Admin Account	~	
Dashboards	Application Process Flow Active for less than one minute	< Portal Application (< 1 Min)	Assign Funding	Course Information	Closed	eout Registra	tion Team Approval E	Disbursement Request	>	
婚 Dashboards	General Training Inform	ation Approvals Documents Participants	Funding Amendment	Disbursement Request Closeout		-				
Funding Requests										
Funding Applications	Organization *	,o	Application Contact	*	Q	Workforce Development * Coordinator			Q	
Training Participants     Project Closeouts	Training or Class Title		Created on Behalf of			Request Type *	Stage 2: Compact Member Funding >	¢	Q	
Compact Membership	Start Date *	(**	End Date	·		Budget Year	@ <u>2025</u> ×		Q	
Compact Applications	Is this funding request for * a college credit class?	No v	Is it a online training?	No	$\sim$	Fund	Harold Alfond Fund ×		Q	
Accounts	Number of Training Hours *		Class ID			Number of Employees to * be Trained				
	Does this training lead to a * credential?	No $\checkmark$	Course Code			Request 10% Admin Rate	No		~	
	Credential Type					Flat Rate Cost	No		~	
	How will training enhance * employee growth?					Retail Price per Frontline * Worker				
						Total Funding Request * (Amount)			- 1	
	Timeline					Amount Obligated			- 1	
						l acknowledge my obligation as a compact member	No		~	

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:

← 🖾 🔚 Save 💾	Save & Close → New 🛛 Flow 🗸 🕫 Se	nd Report For Signa 🗸						
New Project - Unsaved				_	Pending Status Reason	Active Status RSM US Grant Manager Owner	ment System Admin Account	$\sim$
Application Process Flow Active for less than one minute	< Portal Application (< 1 Min)	Assign Funding	Course Information	Closeout	t Regist	ration Team Approval	Disbursement Request	>
General Training Inform	ation Approvals Documents Participa	nts Funding Amendment	Disbursement Request Closeout					
Organization *	5 Lauran Tacting 3 (do not use) X	Application Contact	* Later contact	0	Workforce Development			0
Tululu un Chan Title	La <u>Lauren resung zituo nor user</u> ~	Control on Data Mark	Contacts	~	Coordinator			14
Training or class little		Created on Benair of	IP3 Lauren Polte	~	Request Type	Stage 2: Compact Member Funding	×	2
Start Date *		End Date	* P4 lauren.polte@rsmus.com	Ť	Budget Year	@ <u>2025</u> ×		Q
Is this funding request for *	No	V Is it a online training?	auren.polte+1@rsmus.com	~	Fund	Harold Alfond Fund ×		Q
Number of Credits		Class ID	+ New Contact	anced lookup	Number of Employees to			

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

Up	skill Maine		P Search				Quick Create: Cont	tact	$\times$
	← 🖾 🖬 Save 🛔	לי Save & Close 🕂 New 🔊 Flow 🗸 🛷	Send Report For Signa \vee				First Name	•	
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	Active for less than one minute	< Portal Application (< 1 Min)	Assign Funding	Course Information	Closeou	ut Registration	Job Title	•	
	General Training Info	mation Approvals Documents Partici	pants Funding Amendment	Disbursement Request Closeout			Mobile Phone	•	
5	Organization	A Lauran Tacting 2 (do not use) X	Application Contact			Workforce Development	Date of Birth		
	Training or Class Title	Lauren Testing 2 (do not use) *	Created on Behalf of			Coordinator	Address 1: Street 1	•	
	Start Date		End Date			Request Type * 🗑	Address 1: Street 2		
	start Date		En Date			Budget Year 📀	City	•	
IS	a college credit class?	No	is it a online training?	No		Fund	ZIP/Postal Code	·	
	Number of Credits		Class ID			Number of Employees to *			

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).

← 🔲 🗹 🔛 Save	e 💕 Save & Close 🦻 Quick Connect	∨ + New ₿	🖞 Giving \vee 🌘 Send sun	rey 首』 Update Giving Societies ☆ Follow 虎	Open org chart	Deactivate 🗘 Lists and s	segments
Lauren Polte - Contact	- Saved	Related V				lauren.polte@rsmus.com Email	Any Preferr
Suffix			Company	S Lauren Testing 2 (do not use) ×	Q	ZIP Code	• •••
Phone Number *	(123) 456-7890	C	Phone Extension			Secondary Address	
Alternate Phone			Date of Birth			secondary radiess	
Job Title *	Supervisor		Gender	•	~	Address Type	
Ethnicity		$\sim$	Social Security Number	<sup>≜</sup> No		Street 1	
Race		$\sim$	Entered			Street 2	
Center Compact Member- *			Social Security Number	P		City	
BI Code			Student Number			State	
			Are you a veteran?	No	~	ZIP Code	
				+ New Contact Organ	niza	Description	
First Name ~	Last Name	2 ~	Role ~	Email ~			

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

← 🖾 🖬 Save	e 👹 Save & Close $+$ New $ ot\!$			
New Contact C	Organization Role			RSM US Grant Management System Admin Account V
General				
First Name		Role		×.
Last Name		Email		
Organization	Lauren Testing 2 (do not use) ×	ر Contac	図 <u>Lauren Polte</u> ×	م
Created On	۵			

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:

New Project - Unsaved					Pending Active RSM Status Reason Status Comme	I US Grant Management System Admin Ac
ctive for less than one minute	Portal Application (< 1 Min)	Assign Funding	Course Information	Closeout	Registration Team Approval	Disbursement Reques
General Training Information	Approvals <b>Documents</b> Participan	ts Funding Amendment D	isbursement Request Closeout			
New Project - Lingund						
item inspect of saved					Status Reason Status Rose Owner	anagement System Admin Account 🛛 🗸
Application Process Flow Active for less than one minute	Portal Application (< 1 Min)	Assign Funding	Course Information	Closeout	Status Reason Registration Team Approval	anagement System Admin Account V Disbursement Request
Application Process How Active for less than one minute General Training Information	Portal Application (< 1 Min) Approvals Documents Participants	Assign Funding Funding Amendment Disbur	Course Information sement Request Closeout	Closeout	Reding Active RSM US Grant Ma Status Reason Status Registration Team Approval	Disbursement Request
Application Process Flow Active for less tean one moute General Training Information Total Funding Request * (Amount)	Portal Application (<1 Min) Approvals Documents Participants	Assign Funding Funding Amendment Disbur	Course Information sement Request Closeout Budget Amount (Sum of Participants)	Closeout	Pending Active Rom US Grant Ma Satur Reson Su Registration Ream Approval	Disbursement Request
Application Process flow Achieve for less flow of Achieve for less flow of Achieve for less flow of Ceneral Training Information Total Funding Request * (Amount) Number of Employees to *	Portal Application ( < 1 Min) Approvals Documents Participants Retail Price Worker	Assign Funding Funding Amendment Disbun	Course Information sement Request Closeout Budget Amount (Sum of Participants) Obligated Amount =	Closeout	Pending Active Reson Scient Ma Satuk Reson Science And Active Resonance Ac	Inagement System Admin Account

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:

kii Maine	≫ Sedi¢i				V T © / V (RU
< 다 Bave 🔐 Save & Close 🕂 New 🗋 Deactivate 🌒 원	a ∨ []‡ Create Document () Refresh	$\mathbb{Q}$ Check Access $\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ $	유, Assign ✓ Approve	e 🚽 Sendback 🔇 Amend 🔇 Continue 🛛	> Flow $\vee$ : 🕼 Share $\vee$
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Application Process Flow Active for less than one minute Portal Application (< 1 Min)	Assign Funding	Course Information	Closeout	Registration Team Approval	Disbursement Request
General Training Information Approvals Documents Participants	Funding Amendment Disbursement	Request Closeout Related $\vee$			
				+ New ∨ ↑ Upload 3 Document Loca	tion $\vee$ 🖪 Open Location $\vee$ :
Name ~	Path $\uparrow$ $\checkmark$	Modified ~	Modified by $^{\scriptscriptstyle \vee}$	Created On SharePoint ~	
		No data available			

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

#### Manually enter participants:

← 🖾 🖬 Save 🚏	Save & Close + New	🕼 Deactivate 🌘 🧍	R 🗸 🗋 Create Document	🖒 Refresh 🛛 🔍 Check A	ccess 🗄 Process 🗸	A, Assign 🗸 A	pprove 🗧 Sendback 🔇	Amend 🔇 Continue 🚿	ilow ~ :	🖄 Share 🗸
Lauren Testing 2 (do Project	o not use) - Saved	0	0	0		0	Pending Active Status Reason Status	RSM US Grant Manag	jement System Admin A	ccount 🗸
Application Process Flow Active for less than one minute	< Portal Appl	lication (< 1 Min)	Assign Funding	Course Info	rmation	Closeout	Registration Te	am Approval	Disbursement Reque	st >
General Training Inform	nation Approvals D	ocuments Participants	Funding Amendment Di	sbursement Request	Closeout Related $\vee$					
Total Funding Request * (Amount)	\$540.00				Budget Amount (Sum of Participants)	۵				
Number of Employees to * be Trained	12	Retail Price Worker	per Frontline * \$45.00		Obligated Amount = Participant Sum	≜ No				
Flat Rate Cost	Yes	<ul> <li>Requested</li> </ul>	10% Admin Rate No	~						
Active Participants $ \checkmark $							+ New Budget Item	Add Existing Budget It	Ů Refresh ⊮ <sup>e</sup> Fl	ow 🗸 🕴
$\checkmark$   Contact $\lor$	Email (Contac	ct) $\checkmark$	Job Title (Contact) $\smallsetminus$	Current Year Corr	npact Funding Usage (Contact) $\sim$		Budget Amount $\checkmark$	$  {\rm Participant  Result} \lor$		в
				No data	a available.					
									$\  \  \in \  \   \in$	Page 1 $\rightarrow$

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

General         First Name       I         Aternative First Name       I         Aternative First Name       I         Email       I         Contact       I         Bodget Amount       I         Anendment Request       I         Anendment Request       I	New Budget Item					Lauren Testing - Lauren Testing 2 (do not use) Project
First Name     •     •     Last Name     •       Atenative First Name     •     •     Suffix     •       Email     •     •     Job Tifle     •       Contact     •     •     Date Filtinh     •       Budget Amount     •     •     •     •       Amendment Request     •     •     •     •	General					
Akternative Finst Name	First Name	*		Last Name *		
Email     Abo Tifle     Indext Contact       Contact     Indext Contact     Deter Binth       Budget Amount     Indext Contact     Participant Result       Amendment Request     Indext Contact     Amendment Request	Alternative First Name			Suffix		
Contact      Date of Birth      Image: Contact of Birth	Email	•		Job Title •		
Budget Amount      Participant Result      V       Amendment Request      Amendment Request     Mo	Contact		م	Date of Birth		E
Amendment Request Amendment Request  Outstanding	Budget Amount			Participant Result		~
	Amendment Request		~	Amendment Request Outstanding	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**':



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** <u>mccsno-</u> <u>reply-alfondworkforcegrants@mainecc.edu</u>" 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 cause delays in process If you have any question	not include the above ing approval emails. ns or concerns, pleas ember Funding Requ	information, it w e feel free to read lest≁	ill delay proce	essing your fi ndtraining@r	unding request. We nccs.me.edu.	have been red	ceiving a high volum	e of submis	sions, which c Apply for Fund	ing
Title	Organization	Contact	Start Date	End Date	Requested Amount	Approved Amount	Funding Status	Request Number	Created On <b>↑</b>	
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
Contact Us   mccsalfone	<u>ttraining@mainecc.e</u>	<u>du   207.629.400</u>	0				Ма	ine Commu	nity College Sy	Withdraw Application

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

←   □	📑 🗟 Save 👹	Save & Close	+ New 🖸	Deactivate	<u>8</u>	Create Do	cument 🕐 Refresh	🖓 Check Access	Process	✓ Å, Assign	✓ Approve ← Sendback	Amend Contin	ue :	R 🗐
Visible Project	Emissino Training	and Certifi	cat - Gorha	am Sand &ar	mp; Grav	el - Saved						Submitted Active Status Reason Status	e PM # Portals-Upskill Owner	ll Maine
pplicatio	m Process Flow <	Portal A	Application		Assign Fun	oling (10 Min)	Cou	O rse Information		Closeout	Registration Team	Approval	Disbursement Reque	est
General	Training Information	Approvals	Documents	Participants	Funding	Amendment	Disbursement Req	uest Closeout	Related $\vee$					
end Back	Reason							D Send Back I	Details					
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	Approval Type 1 ~			Owner ~			Approver ~			Date Approved ~	Status Reason	↓ ~ Send B	ack Reason ~	Ø
	Assign Funding			A Application	Approval Te	am					Ready for App	proval		
	Closeout			🗪 # Portals-U	Ipskill Maine						Pending			
	Course Information			Jennifer L G	Cormier						Pending			
	Disbursement Request			RT Registratio	n Team						Pending			Ø
	Registration Team Appr	oval		RT Registratio	n Team						Pending			Ø
	Portal Application			🗪 # Portals-U	lpskill Maine		🚧 # Portals-U	Ipskill Maine		2/28/2025	Approved			
Rows: 6														

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':

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Visible Emissi Project	ino Training a	and Certificat - Gor	nam Sand &ar	np; Gravel	- Saved							Submitted Status Reason	Active Status	PM # Portals Owner	Upskill Maine	· ~
Application Process Active for 17 minutes	Flow <	Portal Application		Assign Fundi	ng (13 Min)		Course Info	ormation	c	Closeout	Registration Te	) am Approval		Disbursemen	t Request	>
General Trainin	ng Information	Approvals Documen	ts Participants	Funding	Amendment	Disburser	ment Request	Closeout Related $\vee$								
Total Funding Reque (Amount)	est * \$400.0	0						Budget Amount (Sum of Participants)	۵	\$220.00						
Number of Employee be Trained	es to * 2		Retail Price Worker	per Frontline	\$200.00			Obligated Amount = Participant Sum	۵	No						
Flat Rate Cost	No		<ul> <li>Requested</li> </ul>	10% Admin Ra	te Yes		$\sim$									
Active Participar	nts ~										+ New Budget Item	🖄 Add Existing B	udget It	🖒 Refresh	$_{\rm o}{}^{\rm o}$ Flow $\smallsetminus$	r e
$\checkmark$ Contact $\lor$		Email (Contact) 🗸		Job Title (C	iontact) 🗸		Current Year Co	ompact Funding Usage (Contact)	~	1	Budget Amount 🗸	Participar	nt Result $\lor$			B
Jeff Tarantir	no	jefftarantino@gsgr	avel.com							\$50.00		\$110.00				
Darin Shaw	v	darinshaw@gsgrav	el.com	Manager	r							\$110.00				→
											J			$\leftarrow$	← Page 1	$\rightarrow$

## Verify the Compact Member has available funding:

ctive for 17 minutes	Portal Application		Assign Funding (13 Min)	Course Information	Clos
General Training Infor	mation Approvals Document	s Participants	Funding Amendment	Disbursement Request Closeout Related $\vee$	
Organization	* Gorham Sand & amp; Gravel ×	م	Application Contact	* 网 Jeff Tarantino ×	Q
raining or Class Title	* Visible Emissino Training and Certific	cation	Created on Behalf of		
itart Date	* 4/22/2025		End Date	* 4/22/2025	:::
s this funding request for college credit class?	No	$\sim$	Is it a online training?	• No	$\sim$
Number of Credits			Class ID		
Does this training lead to a	Yes	~	Course Code		
Credential Type	Certification		Current Year Compact Funding Usage	S0.00	
low will training enhance mployee growth?	Participants will be certified as "Met Emissions Observers" by meeting th	hod 9 Visible training and	Last updated:	2/28/2025 4:13 PM Recalculate	
equest Number	<sup>ک</sup> 11980				

## Verify funding is available:

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

COM0030 - 3 OAKS ACADEMY - saved       Active Submitted Organization from Approval       Optical-Member Funding - Compact Member Funding - Compact Member Funding - Compact Member funding - Compact Member for a	A Home					
Prined           Statul          Statu	🕙 Recent 🗸 🗸	COM0030 - 3 OAK	S ACADEMY - Saved	Active Submitted	Portals-MCCS GMS Dev Porta	· ~
Dashboards	🖈 Pinned 🗸 🗸	Project · Compact Member	Funding ~	Status Status Reason	Owner	
B Dathboards       Internation Approvals Documents Participants Funding Amendment Disbursement Request. Related >         Congrast Membership       Corganization       CS JOAKS ACADE × P         Training Participants       Start Date       1/14/2025       Image Mathematical Start Date       Workforce Development * P         Compact Membership       Is this funding request for a college credit class?       Image Mathematical Start Date       1/14/2025       Image Mathematical Start Date       1/18/2025       Image Mathematical Start Date <t< th=""><th>Dashboards</th><th>Application Process Flow Active for 30 days</th><th>Portal Application     Assign Funding (2 Min)     Closeout</th><th>Registration Team Appr</th><th>oval Disbursement Request</th><th></th></t<>	Dashboards	Application Process Flow Active for 30 days	Portal Application     Assign Funding (2 Min)     Closeout	Registration Team Appr	oval Disbursement Request	
unding Rquests       Understall infaning information Approvals Documents Participants Pancing Amendment Disoursement Request Neated *            Practing Application           Organization           Compart Applications             Training Participants           Compart Applications           Compart Applications           Compart Applications           Workforce Development           Munder of Hours           Munder of Hours <td< td=""><td>語 Dashboards</td><td>Court This is the</td><td>na terrete de la contrata de la contrata</td><td>nagonadon rean repp</td><td></td><td></td></td<>	語 Dashboards	Court This is the	na terrete de la contrata	nagonadon rean repp		
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a Taining Participants Start Date * 1/14/2025 End Date * 1/18/2025 * 1/18/2025 # 2025 * 2	Funding Applications	Organization *	B 3 OAKS ACADE × P	Workforce Development		P
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Compact Applications     College credit diss?     Early fragit real     D data       Accounts     Application Contact     R BM Admin × P       R Contacts     Program Title     * Microsoft Training       Bierd description of the contact     Power Platform, Azure     College/Training Vendor       How will training enhance     How will training enhance employee growth?     How will training enhance of the playee growth?	Compact Membership	Is this funding request for a	Vumber of Hours * 4	Burjaet Year		0
State Contacts     Application Contact     State Address in Contacts     State Address in Contacts     State Address in Contacts     Pure interval     Fund     Interval     Pure interval       R     Contacts     Program Title     Microsoft Training     Microsoft Training     Number of Employees to 's 2       Brief description of the course     Power Platform, Azure     College/Training Vendor     College/Training Vendor     College/Training Vendor       How will training enhance     How will training enhance employee growth?     How will training enhance on ployee growth?     Flat Rate Cott	Compact Applications	college credit class?			0 2023	-
R Contacts     Program Title     Microsoft Training     Microsoft Training     Number of Employees to 2       Brief description of the course     Power Platform, Azure     College/Training Vendor     Classer/Training Vendor     Classer/Training Vendor       How will training enhance     How will training enhance employee growth?     How will training enhance of training     Fild Rate Cott	Accounts	Application Contact	网 <u>RSM Admin</u> × 户	Fund	Harold Alfond Fund ×	, p
Brief description of the course     Power Platform, Azure     College/Training Vendor     College/Training Vendor </td <td>R Contacts</td> <td>Program Title *</td> <td>Microsoft Training</td> <td>Number of Employees to be Trained</td> <td>• 2</td> <td></td>	R Contacts	Program Title *	Microsoft Training	Number of Employees to be Trained	• 2	
How will training enhance "How will training enhance employee growth?" Request 10% Admin Rate		Brief description of the ' course	Power Platform , Azure	College/Training Vendor	A Nathan Schempp 2 ×	P
Flat Rate Cost		How will training enhance	How will training enhance employee growth?	Request 10% Admin Rate		~
		employee growine		Flat Rate Cost		~

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

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- Home	←      ☐	Save & Close + New [	2 Deactivate 🗐 Delete	C Create Document	resh 🔍 Check Access 🔊	How 🗸 🕴		😢 Share 🗸
© Recent ∨ x <sup>2</sup> Pinned ∨	Harold Alfond Fund	l - Saved						
Finance	General Allocations	Rolatod ~						
🗈 Disbursement Reque								
Disbursement Details	Name	Harold Alfond Fund	Fund Number		Budg	lget		
Funds	Director		,D Budget Year	^ @ <u>2025</u> ×	ر Targ	jet Amount		
🖶 Funds					App	roved Amount	\$0.00	
<ul> <li>Allocations</li> </ul>	Budget Setup				Last	updated:	2/7/2025 8:10 PM	
Partners	Next Fund		,0 Budgeted Fund	No	V Appr Upd	roved Allocation (Last だ lated On)	2/7/2025	
Accounts							8.10 PM	
A Contacts								
					Allor	cation		
					Alloc	cated Amount	\$5,692.00	
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					Last	updated:	2/7/2025 8:10 PM	
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					Rem	naining Balance G	(\$5,692.00)	

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:

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(m) Home (⊡) Recent ∨	COM0030 - 3 OAKS ACADEMY -Saved	Active	✓ Approve ← Sendback	5 Dev Portal
☆ Pinned ✓ Dashboards	Project · Compact Member Funding · Application Process Flow Active for 30 days · Portal Application Assign Funding (< 1 Min)	O Closeout Registrati	③ Amend ③ Continue	D ent Request
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Compact Applications	□         Approval Type ↑ ×         Owner ×         Approver ×	Date Approved ~ S	tatus Reason $\downarrow$ $\checkmark$ Send Back Reason	× Ľ

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:

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Visible Emissino Train Project	ning and Certificat - Gorham Sand &a	mp; Gravel - Saved				Submitted Active Status Reason Status	# Portals-Upskill Maine Owner	• ~
Application Process Flow Active for 26 minutes	< Portal Application	Assign Funding (23 Min)	Course Information	Closed	ut Regist	ration Team Approval	Disbursement Request	>
General Training Informa	ation Approvals Documents Participant	Active for 23 minutes	uest Closeout	Related $\sim$				
Organization *	S Gorham Sand & Amp: Gravel ×	Amount Obligated  Obligated Amount =	Provide a numbe	م	Workforce Development	Kristen D Wiegand (Offline) ×		Q.
Training or Class Title *	Visible Emissino Training and Certification	Participant Sum	Next Stage		Request Type	Stage 2: Compact Member Fundi	ng ×	Q
Start Date *	4/22/2025				Budget Year	⊙ <u>2025</u> ×		Q
Is this funding request for * a college credit class?	No	/ Is it a online training?	No	~	Fund	Harold Alfond Fund ×		Q
Number of Credits		Class ID			Number of Employees to be Trained	2		
Does this training lead to a * credential?	Yes 🗸	, Course Code			Retail Price per Frontline Worker	\$200.00		
Credential Type	Certification	Current Year Compact Funding Usage	\$0.00		Total Funding Request (Amount)	\$400.00		
How will training enhance * employee growth?	Participants will be certified as "Method 9 Visible Emissions Observers" by meeting the training and		Recalculate		Request 10% Admin Rate	Yes		~
Request Number 🗇	11980				Flat Rate Cost	No		$\sim$
					Amount Obligated			
Timeline			+ D 7	7 18 0 :	Lacknowledge my	Yes		~
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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:

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Funding Requests					
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Training Participants	- Device the	0	Created On V	Ch-1	
Project Closeouts	Project *	Owner *	Created On *	Status *	
Compact Membership	COM-2025-0076 - (MGH) Inst of Health Prof	RSM US Grant Management	ystem A 2/12/2025 3:26 PM	Active	
Compact Applications					
Accounts					
A Contacts					
	Rows: 1				

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.

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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.