

SCSEP GPMS Training Module 2 – Grantee & Sub-Grantee Admin Console Transcript

Mauro, Kevin M - ETA CTR 0:05

Since your cameras are off and you are currently muted, if you agree to being recorded at this time, you may turn on your camera or unmute yourself, at which time the agreement prompt will pop up on your screen where you can accept.

I'll give you all a moment to do that.

I also ask that if you've unmuted yourself to agree to being recorded, please remote yourself at this time.

Louise Shavers 0:27

No, I fall very.

Gwendolyn Stephens 0:29

What was that?

Mauro, Kevin M - ETA CTR 0:32

I said.

If you've unmuted yourself to agree to being recorded, please re mute yourself at this time.

As always, thank you for your cooperation. And now I will hand it over to Joyce to begin today's training.

Barcley, Joyce M - ETA CTR 0:47

Terrific. Thanks so much, Kevin, and welcome to the grantee, administrator and Subgrantee Administrator Admin Console training for GPMS.

The purpose of today's training is to equip you as Grantee Administrators and Subgrantee Administrators with a clear and practical understanding.

Barcley, Joyce M - ETA CTR 1:12

So sorry, I was just muted.

So the purpose of today's training is to equip you, the grantee, administrator and Subgrantee Administrator with a clear and practical understanding of your primary features within the GPMS Admin Console. We'll make it clear what each of you can access, and do so you can work effectively.

To effectively manage the entire grants data, the Grantee Administrator uses GPMS to

conduct the following functions.

They can manage the grants, sub grantees, and with the exception of other Grantee Administrators, Grantee Administrators can link and unlink all GPMS users for their grant.

GA's are responsible for entering and distributing the grant's authorized positions among the States and counties in which their grantee operates.

Walker, Iris [DOL] 2:00

okay.

Barcley, Joyce M - ETA CTR 2:02

Grantee Administrators are responsible for approving durational limit extensions for the participants meeting their durational limit policy and Grantee Administrators have the responsibility for generating the quarterly performance reports and uploading them into WIPS.

The training for uploading into WIPS was conducted several weeks ago.

If you happen to miss that training, or if you need a refresher, the training recording and the WIPS upload tip sheets are located on Workforce GPS, older worker, community of practice and the GPMS section under Workforce Integrated Performance System or WIPS.

The Subgrantee Administrators, who have data oversight responsibility for their subgrades, have access to the following GPMS administrative functions.

SGAs have read only access to the authorized positions for their subgroup, they can manage the users for their subgroup and they can generate internal QPRS for program management we will review each function of these user roles from the Admin Console later in the session. Since the Grantee Administrator has access to more functionality. We will be using the GA Admin Console and will note what Subgrant administrator access has to each.

Of the functions.

So when logging into GPMS, the landing page is always the cases page. So as we begin today's session, we'll move into the live system and start on the cases page called SCSEP cases.

GPMS, as I said, always opens on the landing page as we reviewed last week, the top of every page in GPMS displays the blue navigation bar with tabs that are used to move the user through the various areas of the system.

Here we will review the Grantee Administrator functions on the cases page, which has several sections that are available to all users. The participant cases section, however, has two functions available only to Grantee Administrators, which are the move

participant to sub grantees to sub grantees or to transfer participant to another grantee.
Let's take a look at how that's done, starting with moving.

A move is done when a GA needs to move one or more cases from one sub grantee to another sub grantee, let's go through those steps.

Remember always click the reset button before working in cases to be sure all of your cases are displayed.

So have we clicked the reset?

We have clicked the reset.

We have not clicked the reset.

okay.

We're clicking the reset.

okay.

Select your participants by clicking the box in front of their name.

Remember, we're going to start with a move.

Once the name is selected, the select an action box will display its drop down options.

When you hover over it.

There you go.

Click move and then click submit, which will then open the case movement page.

okay. We just have to pick another participant.

That one's already in the movement process.

That one's not active.

We just have to pick an active participant.

And we select the action of move and click submit.

Terrific now we opened the case movement page, which displays the participants who were selected.

You can do one or more participants for this action.

Note that the grantee and grant number are already populated because we are moving participants within the same grant.

Complete the required information for sub grantee.

Note.

And also the case manager to whom the participant will be assigned.

Then click the movement effective date.

And click submit.

That participant that has now been.

Moved to the other sub grantee.

And now goes work on transferring a case.

So again, from the cases page.

Barcley, Joyce M - ETA CTR 7:18

We will select one or more grantees to be moved to another grantee.

Transferring a participant is done for several reasons, and this can include a discretionary transfer for an approved swap of authorized positions.

It can be when participants are orphaned as a result of service area changes or other reasons, such as when a participant moves from one state to another, or to a county in which the grantee no longer operates.

So we follow the same process by selecting one or more active participants and in the select an action box we select transfer and then submit.

Which brings us to the discretionary multiple transfer request page.

okay, here we start by clicking on the participant's gray shaded box, which then turns it blue.

So you know that you're working with that participant.

We're going to enter the name of the recipient grantee.

Remember, we're moving to a new grantee, so let's put an Older Worker Association there we go.

And for purposes here, we're going to list the transfer initiator as.

The participant requested transfer, so here you can actually select either the grantee or the participant.

Enter the required case transfer data.

Details in this case the reason for the transfer we're going to use.

That they want to transfer from a national grantee to a state program.

So that would be another participant reason and because yes, you clicked that now we have to specify.

When a participant initiates the transfer, they will automatically be two mailing addresses that are displayed. The first mailing address on the left is the current address that's in the system.

The second one is the address after transfer.

This is in case the participant is changing their residence. In this case, the participant is not changing their residence, they're just changing who the service provider is.

So you can just move in the same information that is already existing in the in the system.

okay, once that is completed, we're going to scroll down and click the donor certification.

That the grantee is authorized to serve in that county, and then we're going to click submit.

So, please note that okay it's asking do you want to submit the transfer request and are

we sure? Yes.

Okay.

Here's the disclaimer I was about to say because we're in the training site, you normally would not receive an error message.

However, this is just an ongoing issue in the training site and has nothing to do with GPMS production for a participant-related transfer. So this is as far as we can go with this demonstration, but just know that the if you hit the submit button and you say that you wanted to.

Actually do the action it would.

You would get an action completed flashing at the top and it would be completed.

So we're going to see a very similar process now when we do the grantee initiated transfer.

So let's scroll back up to the top with the same participant for demonstration purposes, we're going to change the transfer initiator from participant to grantee.

And here we have to again list the reason for transfer the dates already there from the prior, the prior action. And because this is the grantee initiated, let's say that it the participant was orphaned as the reason.

Oops.

Did somebody take the screen?

Chanel, we lost your screen, please.

Thank you. Okay, great.

So because this was a grantee-initiated transfer, there is only one and they're not moving. There's only one address field that is being shown. So, for here you would click on the certification again that the. It assures that the recipient grantee is authorized to serve the county and agrees to the terms of the transfer.

And you would click submit.

So here the transfer request is displayed and we click yes to complete the donor's portion of the transfer and to return to the cases page.

Okay.

So from here the participant has been submitted for transfer by the donor grantee.

That's the first half of the action.

The second-half of this transaction is now the responsibility of the recipient grantees Grantee Administrator, who will receive a task to accept the transfer in their my task page.

Let's take a look at the recipient, GA's My tasks to complete the transfer.

Great. Both the grantee and participated initiated transfers generated task for the recipient grantee to either accept or reject on the Grantee Administrators my task page we locate the participant being transferred and we click on their case ID.

And that opens up the case transfer details page.

And the case details, the Grantee Administrator now assigns the transferred participant to the sub grantee.

Remember, this is the recipient.

So they have to assign it to their sub grantee.

And here we'll just pick. How about Alliance for Employment?

To grant information Auto populates and now we assign the case to a case manager.

Okay.

Okay.

Now we check the recipient certification that they are authorized to serve the county and accept the transfer terms.

The GA can always decline the transfer if it was done in error or another reason simply by entering an explanation in the comments box.

Because it will be required if rejecting a transfer.

And then you would click the decline transfer. But here in this example, we're going to accept the participant, and we'll click accept transfer.

The transfer acceptance box opens, and we will say yes, accept that request.

The donor Grantee Administrator will receive a system generated e-mail letting them know when the transfer has been accepted or rejected. If the recipient grantee rejects the transfer, those participants will remain on the donor's cases. So as we can see, the person was is no longer on the task list.

There is also an option to cancel a transfer before the recipient accepts it, so this is if we initiate the transfer.

But the recipient grantee just hasn't accepted it yet.

We can actually cancel that transfer, so let's take a look at the process and return back to the cases page.

You might want to reset your filters just to make sure that everybody will be displayed when you select your participant.

So now let's find the participant.

Barcley, Joyce M - ETA CTR 16:00

Whose transfer needs to be cancelled?

You can either enter it in the search box or you can scroll down and click on their link. However, that works for you.

Barcley, Joyce M - ETA CTR 16:17

Super. And there's our participant. You click on that participant to open the case.

And from there you will click on the re the participants related actions.

And in the related actions you will see that there is a transfer.

Cancel transfer and you click on that to open the transfer confirmation.

And here you see in red it says it's a cancel transfer confirmation you see.

Are you sure that you want to cancel this transfer?

We recommend entering a brief explanation for the cancellation and the cancel comments box.

And then you would go down and you would click on yes continue which opens another confirmation for the cancellation.

So we're making sure that you definitely want to do this.

And you would click on yes.

Cancel this request.

And then the action completed flashes at the top of the screen and brings you back to the related actions page, which means your transfer has been cancelled.

So this concludes the GA specific actions conducted from the cases page.

Now we'll move to the Admin Console, where the majority of the administrative data activity occurs.

Okay.

We'll just quickly review the Admin Console.

So as previously stated, we're using the Grantee Administrators Admin Console for demonstration. This Admin Console has 17 different function buttons. Grantee Administrators have access to all 17 buttons while grant Subgrantee Administrators have access to 15 of those 17 buttons.

Although there are 15 buttons available to the sub Grantee Administrator on their admin console, not all of those buttons function as they do for the GA and we will identify the different levels of access between the user roles when we are on those pages.

So the Grantee Administrator and the subgrantee Admin Console use the following six buttons for the core of their grant data's administrative work.

The first is the manage grant which connects or we call links sub grantees to their grant. Manage users is for adding and removing users and where the roles are established or edited.

Manage authorized positions is used to allocate authorized positions by sub grantee and counties.

SGAs can only view this information for their own subgrant.

They cannot modify any of the information on this in this function.

The duration of Limit Extension Utility is also restricted to Grantee Administrators and allows them to extend program participation for eligible individuals based on their policies.

Next is the manage eligibility task assignment which gives the Grantee Administrator

the opportunity to reassign tasks to different users, which is useful for staff changes or staff absences, and the last is view transfer move history which provides Grantee Administrators a record of all participants, transfers and movement.

There are two other Admin Console report buttons used by Grantee Administrators. Which are generate WIPS QPR, which is used by the GA to submit quarterly performance reports to WIPS and generate WIPS QPR addendum, which GA's use as part of the quarterly WIPS reporting these two report buttons will be covered in the report's training module. Today we will focus on the six administrative functions accessed from the admin Console, beginning with managed grants.

Once a new sub grantee's information has been added into GPMS, the GA can link or add.

We call it link is the same as add that sub grantee to their grant.

Here's how that's done.

Under user organizations, select your grantee name.

To open the manage page for that grant.

Most of the time, you're only going to see one grantee listed your own grant listed.

But because we're in the training site, we do have multiple grants listed, so that's why you saw more than one grant there.

Okay, from here you're going to select the program year.

And for the training site, we have to select 2022.

And click the grant number hyperlink and that will open the edit grant page.

In the edit grant page from here, the Grantee Administrator can link or unlink sub grantees. This page contains a listing of all sub grantees currently linked to that grant. So let's begin by unlinking an existing sub grantee and then linking them back in to demonstrate those two functions.

Under the linked subgrantees, we're going to click the box in front of the organization's name to open the action.

And now as you see, just like with participants, that action button opens a drop down and from the drop down, we're going to select remove the grant and we're using regional management services is going to be removed and we click submit.

Are you sure?

Yes, we're sure that's great.

And now as we scroll down, we should see regional management is no longer on the list.

So let's add the subgrantee back into the grant, and we do that by clicking the add subgrantee to grant.

Which opens the page and we can select the subgrantee by clicking add new.

And begin typing the name of the subgrant T to be added back.

And you'll see the options will open up as you begin typing.

And just so you can just select it from that list.

And then click submit to return to the edit grant page.

And if we scroll down, we're going to see that.

Regional management services has been added back to the list of linked sub grantees.

It's as simple as that. Okay, now let's return to the Admin Console.

And the next button we're going to be taking a look at is our manage users' button.

Manage users is where Grantee Administrators can add and edit users for the grant and sub grantee. Administrators can do the same for their subgrant.

So we're going to begin by selecting the grantee and subgrantee.

So here we're going to select older workers.

And we've got alliance. That's terrific.

And if you want to add a read only function for a particular user, you would click yes under add global read only user. It's not a required field, so you don't have to click anything there.

So we're just going to click submit to open the sub grantee's user list.

okay.

From here, the Grantee Administrator and the Subgrantee Administrator can view all GPMS users currently linked for the sub grantee and where new users are added and existing users can be viewed and edited. Grantee Administrators can add or link all user roles for their grant except for another Grantee Administrator. Subgrantee Administrators can manage the case, supervisor and case manager, user roles for their sub grant.

So before linking a new user to the grant, let's edit an existing user by clicking on the name hyperlink.

Sure.

Great.

Once we clicked the user, the user's information opens up and it can be edited, including their user role, their basic content information, or their relationship to SCSEP. Let's just add a work phone number for this user.

There is one already there, so let's change the user role from.

SCSEP Subgrantee administrator to Grant Supervisor.

And we click, then we go down and we click the certification box.

And we click update which returns you to the list of users.

And you scroll down to your list of users.

And you see now that the.

The user role has been changed to Grant Supervisor.

Okay.

On the list you can see that it's been changed.

So now let's add a new user to the system by clicking add user.

And open the add new user page.

Begin entering the name of the new user to be added.

Once you start typing, you'll see a drop down list appear and you can click on the user's name to be added.

So this will be as you're entering it all usernames that have related characters in their name will be displayed and you can simply select them from that list.

Of users that are already in the system that you want to link to your grant.

Okay.

Now we select the user role from the drop down and in this case we're going to select case manager.

And the supervisor is always selected for the case manager role.

The other roles do not have supervisors selected, only the case manager.

So then we select the supervisor from the drop down list.

Now we're going to finish entering the user's basic information. If there's any missing or new information that needs to be added, and we're going to select the relationship to SCSEP from the drop down.

Just some things to note.

When a contractor is selected.

The contractor's name must be entered.

Also, when other is selected from the drop down.

You must specify the relationship before you can.

You can link the.

You can add that user.

This could be a specific type of consultant, let's say such as an auditor that doesn't have a relationship like contractor or employee. But for this example let's just use the relationship as an employee.

Then you click this certification statement.

And then click add user.

The new user is now linked and is part of the list of linked users with this sub grantee.

So now back to the Admin Console.

For the next button used by the grantee, administrator and sub grantee which is managed authorized positions.

This is where Grantee Administrators allocate grant positions.

As stated previously, Subgrantee Administrators can view this information, but they can make no changes.

So let's click on manage authorized positions to begin.

Oops, we're already here, so we're going to now.

Select the user organization and again there's more than one grantee here because this is the training site. Normally the Grantee Administrator would just see their own grant, so let's click.

Yep, actually, you know what?

Let's click training.

Can you go back and let's click on training?

Yeah, unemployment services.

okay, great.

okay.

So from whoops, from here we have to enter the program year and as the note shows us that we can make no changes to the prior program years. Again, this is the training site, so our program year is limited to PY 23.

But let's check the add the county for this particular.

Organization or for this particular allocation.

And I'm sorry to start with the state.

Great.

Which with Arkansas. Thank you.

And we're going to check.

We're going to select Benton County.

Super. So in this example, Benton County has four authorized positions.

And three have already been allocated to two sub grantees that are already showing.

3 sub grantees that are already showing.

The total number of allocated positions yet to be allocated or authorized positions yet to be allocated is one.

So to begin allocating positions or to allocate remaining positions, you always start with the add new allocation button.

Let's click add new allocation.

And begin entering the name of the sub grantee.

Let's use training and employment services of Benton County.

Which will display a list of the linked subgrantees.

Great. And there you selected it.

Enter the number of authorized positions to be allocated to this subgrantee. So, we'll select one now.

Notice before you enter the one that above in red, we have total number of authorized positions to be allocated.

There's one once all of the positions for this county have been allocated, the lettering will turn to green.

And it should show a 0.

So we've got there. We go once you remove your cursor from entering the number in positions, it automatically calculates the number of positions yet to be allocated.

And you can see we were successful and we have the number one and it's turned green.

That means all of the counties positions have been allocated, so once they've all been allocated, we can select save and close to return to the state summary page.

We would use the same allocation process for each state and each county until all of the grants authorized positions have been allocated.

So now let's return to the Admin Console and work with the next grantee button, which is durational limit extension utility.

This utility allows Grantee Administrators to extend program participation for eligible individuals based on the grant's policies, and we will start.

By should we see that the eligible participants are displayed for the extension, you can select one or more participants to work with at a time.

However, the Grantee Administrators should confirm their durational limit policy and the participants information prior to granting any extensions.

So if you're unsure of if the participant is eligible for an extension, you would then click the history icon to the far right.

Which displays all of the waiver factors for the participant and for this organization. We know that we only need to have one waiver factor to meet the qualification for an extension.

So we know we're good to go.

There is a left return arrow that returns us to the extension page.

So once all the information's been confirmed and the GA certifies that the participant is eligible, you would click on the select participants.

Click the certification of the extension request.

You must enter who is approved by, so you can just enter the Grantee Administrator's name here.

And then the add extension button opens up, brightens up and you can click that.

And that's all there is to adding durational limit extension for a participant.

So let's return again to the Admin Console, where we already are and move to the next managed eligibility task assignment.

Super.

This is used to assign, excuse me assign tasks that require approval from one supervisor to a different supervisor.

Tasks such as eligibility and research can be reassigned here.

Excuse me as I take a sip of water.

So this utility ensures that supervisors can always be available to receive tasks that

require time sensitive approvals during another supervisor's absence.

Select your grantee name, in this case older workers association.

And select the current supervisor whose eligibility tasks are being reassigned to the new supervisor, who will receive their eligibility tasks in their absence.

And we're selecting the new assignee from the drop down and we're selecting joy supervisor and we're going to click submit.

Task box opens that shows that the excuse me, the tasks are now being reassigned.

Please refresh your task dashboard to see updated assignees so you know that this activity this action has been completed and you can click close.

Oops, the task has already been submitted. Okay, so it's telling us it's already been submitted.

So I guess this is a redundant box here.

So when the supervisor returns so we transfer the eligibility tasks because the supervisor was going on extended vacation or extended leave, they're coming back. All you have to do is repeat the process to transfer those tasks.

Eligibility tasks back to the original supervisor.

So now again, let's return to the Admin Console to review the next function which is view transfer, move history.

Okay.

View transfer move history displays a record of all participant transfers and movements and this is only available to the Grantee Administrator.

Begin typing the name of your grantee.

In this case, we're going to put training and employment services.

And you can see it opens view and now we're going to select a radio button for.

The type of activity we want to see the history of.

In this case, let's just select donor.

Now you have to select the program year.

Let's put 2024.

The rest of the fields are optional, so they don't need to be completed. If you have the information or you want to use that information, you're free to insert it.

And now we click search.

Hey, your search outcomes display for viewing the donors transfer move history information shows the donor and recipient grant numbers.

The grant ID numbers.

The participant ID numbers the and the type of transfer. If it was participant or grantee initiated and the status of that action and the date.

And this information can be exported into Excel format if you'd like by clicking the export button.

The download screen opens where you will click the refresh button until the export file name is displayed.

Now that was quick.

And then you click on the file name to open the Excel spreadsheet.

Oops. And that's the Excel spreadsheet and you can use the information there as you need.

Sowinska, Ewa [DOL] 39:16

Yeah.

Barcley, Joyce M - ETA CTR 39:18

So now back to the back to the system. We're going to now go into the last function we'll be reviewing, which is the grantee tab on the navigation bar.

Now this grantee tab is only available to Grantee Administrators.

When they when clicking the tab, you'll see two buttons.

One is the grantees, which allows the Grantee Administrator to view sub grants.

Associated to their grant.

The sub grantee button allows the Grantee Administrator to view and manage the sub grantees associated with their grants.

So for all intents and purposes, the grantees tab gives Grantee Administrators like a one stop place to see and manage both their main grant and all of their connected sub grantees.

So now let's move on and take a closer look at the grantees section itself.

Oh great.

So we have to again we have multiple grantees here. So, we'll just pick older worker.

Great. Now you'll see three links on this page for the grant itself. You see a summary.

You see the grantee sub grantees and you'll also see related actions.

The grantee summary gives the Grantee Administrator an overview of the main grant, so you can see it has the grant summary as you scroll down, you'll see that.

The GPMS Grantee Administrators are listed there.

Your read only users are listed and most importantly, your durational limit policies will be listed here as well.

Also notice that it has the extension option, the effective date and the policy status.

So you see, as of 7/1/24.

So PY 24, their active status is option one.

okay.

So going back up to the top.

Let's look at the sub grantees.

And here you can see all the subgrantees that are connected to the grant and this is just a listing.

So you just Scroll down and you can see all the sub grantees.

And if we go back up to the top.

Let's click on related actions.

Well, don't even click there because Oh yes, click there. Thank you.

So we have the managed grants and the managed authorized positions and these are the two buttons we already worked with on the Admin Console.

So what this is showing is that there are multiple ways or two ways for Grantee Administrators to manage their grants and to manage authorized positions.

It can be done either from the Admin Console, which we've already reviewed, or it can be done from.

The related actions link that's on the grantees tab of the navigation bar and if you clicked on the manage grant or the manage authorized positions, it takes you back to the exact same place that we were off of the Admin Console.

So if we go back now to the grantees tab in the navigation bar, and let's take a look at what these sub grantees tab has.

okay, from the sub grantees we section the.

Grantee Administrator can access each of the sub grantees by clicking on their link.

So let's just click on alliance for employment.

Okay, on this specific sub grantees page, you'll find the sub grantees summary information and you'll also see the list of the individuals who are the Subgrantee Administrators that are assigned to this sub grantee.

Up on top, there is a related action buttons.

There are no related actions being used and this function at this time. I mean you can click on it, but you're not going to see anything because right now there are no related actions for sub grantees.

At some point in the future, there may be, and that's where those would be located.

Let's see. Now, let's go to the next.

Oops. And that is where.

We will end today's demonstration and we will move now to.

We will move back to the question and answer, let's first take a look at what the key takeaways for this.

Give me a moment as we get those up.

okay.

So the key takeaways.

As we change our slide presentation.

Now you know the end.

Now you know the main parts of the GPMS Admin Console and what they do. You've learned how to move around the Admin Console and use it to handle what you need in GPMS, We showed you exactly how to use important features step by step, you now know.

What grantee admins and subgrantee admins can do in each in the system you now know where to find specific tools in the Admin Console and how to use them.

We hope you have an understanding of which tasks only certain roles like grantee, administrator or sub Grantee Administrator can perform and we hope the training will help you manage your data and GPMS more easily and effectively using the Admin Console.

And now we will open up for questions and answers.

McNeace, Meche - ETA CTR 45:24

Hi Joyce, if anybody have any questions you can please put them in the chat.

I do know that we did get a couple of questions throughout your presentation, but they were pretty much about they asked a question about what is a orphaned participant and I believe I provided that response in the chat with in the chat, which is an orphan participant can be affected when their grant tee no longer operates in that state and or county.

Me where the participant was enrolled, so that means they become an orphan. And in this case, that orphan participant will need to be transferred to the grantee who does either currently or will be operating in that state and or county.

And also there was another question where they were asking about, you know that that wonderful reset button, why do we have to hit that reset button and why doesn't it just default to you know everything. So the answer that was provided again in the chat is that.

When the system was developed, the system defaults to cases with enrollment dates on or after January 1st of 2021.

And this is because the system has so much data in there that in order to not slow the system down when you're logging in, they put this default in where it starts where the cases begin on or after January 1 of 2021.

So that is the reason why that.

The defaults put in there like that and the reason why we always say hit that reset button.

Even though I know Jeff said it sounds redundant, we understand, but kind of figure out would you rather hit the reset button or have a really, really slow system so they choose to have a faster system and then just kind of click on reset.

Barcley, Joyce M - ETA CTR 47:25

But you know, Michi, you might want to also note that last week during the navigation module, we did show how to customize filters so you can customize and save filters so you don't have to which will automatically.

McNeace, Meche - ETA CTR 47:30

Mm hmm.

Barcley, Joyce M - ETA CTR 47:40

Do the resetting and everything for you, and if you haven't had a chance to take a look at that, to participate in that training, you can take a look at the recording on the older worker community of practice.

McNeace, Meche - ETA CTR 47:55

Exactly. Exactly.

But this is more so that you're seeing all of your cases when you hit the reset button. So all right.

And then there was a question about, you know, Mindy had a question, should their screen look like your screen or did this change outside of the production test system? She's saying her hers look different. So, I'm gonna assume that maybe there's some difference because we are in the training site.

Barcley, Joyce M - ETA CTR 48:26

Yeah. Yep.

McNeace, Meche - ETA CTR 48:29

And it is also by user role too.

But you were, you know, based on how you were logged in into the training site. So that might cause that difference of what she's seeing in her production site versus what we have.

Barcley, Joyce M - ETA CTR 48:36

Yeah.

And depends on what their user role is as well.

McNeace, Meche - ETA CTR 48:42

Yup. Okay. And those are the questions that I see thus far.

Barcley, Joyce M - ETA CTR 48:51

Well, while we're waiting to see if there are any, let's have some fun.

These following resources are provided for additional information.

So just a reminder that the next training is scheduled for tomorrow, May 7th from 2:00 to 3:30, and like today, you probably get a little time back and we hope you'll join us for that Case Supervisor, Case Manager, Admin Console training module.

McNeace, Meche - ETA CTR 49:16

Yes, there is a question there.

Piedra, Yaremy [DOL] 49:18

Can I ask a question?

McNeace, Meche - ETA CTR 49:19

Joyce, there's one question, and that question is who do I contact to remove a previous Grant Supervisor?

Or tell them how to remove that Grant Supervisor.

Barcley, Joyce M - ETA CTR 49:33

Sure, Chanel.

Can you take over the screen again back in the system?

Great. Let's go to the admin.

Let's go to the admin console.

So which is it that we're trying to do?

What was the question again, Michi?

McNeace, Meche - ETA CTR 50:00

Is that how do you remove a Grant Supervisor?

So a Case Supervisor.

Barcley, Joyce M - ETA CTR 50:07

How would you remove a Grant Supervisor?

Well, you would probably if you have somebody that is going to become the supervisor.

Now what you would want to do is can you?

McNeace, Meche - ETA CTR 50:18

Now, what if you have a supervisor that you no longer want them to be a supervisor?

Barcley, Joyce M - ETA CTR 50:24

So you want to then change their user role, correct?

I'm just.

McNeace, Meche - ETA CTR 50:29

What if they no longer work for you and you need deactivate?

You need to deactivate that.

Barcley, Joyce M - ETA CTR 50:33

If you need to deactivate, you have to submit a Zendesk ticket to deactivate a user.

McNeace, Meche - ETA CTR 50:36

There you go.

okay.

So.

Barcley, Joyce M - ETA CTR 50:41

You're removing somebody from the system. You would then you do that through Zendesk.

McNeace, Meche - ETA CTR 50:48

All right, let's see.

When can a person that has reached duration get an extension?

Barcley, Joyce M - ETA CTR 50:58

Okay.

Good question.

So the person within the last year, the months before their durational limit, you would go in and you would utilize the durational limit extension.

Chanel, could you scroll down a little bit?

So we see that utility button.

The duration of limit extension utility, that's where you would do the extension. Now again, as we noted when we were doing the demonstration, you have to check two things.

okay.

You have to check two things, but you don't have to do it here.

Chanel, we're just going to talk through it.

You have to check the duration limit policy for the grantee.

Remember you would do that by going into the grantees navigation tab and you can go in and you can make sure that your IDL policy, whatever your IDL policy is.

And remember too that the duration limit policy has to be consistently administered to all participants, so you can't pick and choose who gets the extension if they meet the qualifications for whatever your policy.

Is and they qualify for the extension, they must be given an extension and then if they do qualify, you would have to make sure that the if they have to have waiver factors that are in place to get an extension, then you would go into as we showed.

In the duration of limit extension utility, actually you can open that up Chanel.

By clicking the history icon to the right.

And there you'll be able to see what the waiver factors are.

You can see that they have been updated and so if you know that you can't authorize an extension and the person has the waiver factors, they meet the eligibility. You can do that, and it is with typically within the last several months of the participants' participation or the last year of their participation.

Does that answer your question?

McNeace, Meche - ETA CTR 53:00

You don't see anything yet, but okay.

There was another statement that you can't use reset as a filter, which is correct.

The reset is to basically ensure that you're resetting the system to ensure that all of your cases are visible that are cases that were enrolled before January 1, 2021.

That's the purpose of the reset button.

So the next question we have is when adding a new user for a sub grantee, a list of users appears.

Where is this list coming from?

Barcley, Joyce M - ETA CTR 53:42

It's another good question.

So when you you're adding users, you have users in your system.

That list is all of the users that are already associated with that subgrantee.

So if their name is already on there, they're already in your system.

You just have to check their user role, so they're having difficulty.

You think you have to add somebody because they can't add information in the system, you have to go through and you can look on the list and check their user role.

Make sure they don't have it read only.

The user role, which means they can't add anything.

They can only read. This is where you would add a new a new user if they're in the system they've been added to GPMS already.

This is where you would go in and you would just link them then to your subgrantee. So everybody who's already been linked to your subgrantee, that's where that list comes from.

McNeace, Meche - ETA CTR 54:34

And that list comes from when the Grantee Administrator submits the request to SCSEP help to add new users to their grant and their subgrantee.

Barcley, Joyce M - ETA CTR 54:47

Yeah, it's a multi-step process.

McNeace, Meche - ETA CTR 54:49

Okay.

And the next question is Mindy says she is a grant administrator. But when she's on the grantee tab, I don't see the actions or IDL policy info that was shown. Should we see that?

Barcley, Joyce M - ETA CTR 55:07

Yes. So, is Chanel.

Would you click on the grantees tab on the navigation bar? Super click on grantees.

Click on older worker and scroll down.

If you have an IDL policy, actually everybody has to have an IDL policy.

It should be listed here.

If it's not, you might want to submit a ticket.

McNeace, Meche - ETA CTR 55:35

So is there an action that they can do for their IDL policy from this from anywhere in the grantees tab?

Barcley, Joyce M - ETA CTR 55:44

It's my understanding that this the policy information is added on the back end that we the users, do not enter this information, so it probably comes, you know, every year you have to submit your IDL policy with your grant. And I believe that's when it gets up.

McNeace, Meche - ETA CTR 56:02

Okay.

Barcley, Joyce M - ETA CTR 56:03

Kind of like authorized positions.

You know it gets uploaded from the back end.

McNeace, Meche - ETA CTR 56:09

Thank you. Okay.

Next question is what is the difference between Grant Supervisor and Subgrantee Administrator?

Barcley, Joyce M - ETA CTR 56:21

So remember there are 4 user roles in GPMS, so these are GPMS distinctions. These are not your programmatic distinctions.

This is just for use in this data system. So, we start at the top you have the grant administrator who covers the entire grant that the grant goes to that organization.

That organization might have subgrantees.

Actually the organization.

The grantee is required to have sub grantees, the sub grantee.

Can have Subgrantee Administrators who can do administrative functions just within the sub grant.

The Grant Supervisor is not a sub Grantee Administrator and cannot do the administrative functions and is more of the eligibility and case manager supervisor.

So when we talk about the user roles, we call them the Case Supervisor, that kind of goes along with the case manager, the Case Supervisor.

Manages the case manager, the sub Grantee Administrator manages the sub grant.

Does that give you a distinction?

That's helpful.

Probably would be better to have a graphic like an org chart or something.

McNeace, Meche - ETA CTR 57:37

But yeah, so there isn't a Grant Supervisor.

There is just Case Supervisor.

Barcley, Joyce M - ETA CTR 57:42

Mm hmm.

McNeace, Meche - ETA CTR 57:43

All right, so we have the next question is, what exactly is a donor certification?

Barcley, Joyce M - ETA CTR 57:52

Okay.

So we're talking about the for a mover transfer there.

There are two sides.

There's the donor who's starting the action.

Who's donating, let's say the participant and then we have the recipient who's going to be the receiver of that participant, whether it's a move or it's a transfer.

Whoever the donor is moving or transferring that participant to has to have the authority to receive that participant.

So in the case of transferring to a different grantee.

So it's going from one grantee to another grantee. The donor has to certify that the recipient is authorized to serve in the county in which that participant is located.

And also that the recipient grantee is going to abide by all the terms of the transfer.

Which could be like they keep them in the same host agency, they honor the durational limit extension policy of the donor for the 1st 90 days.

You know, so there are requirements that go along with it, so those with those, that's what those certifications are.

And anytime you see any certification box that has to be clicked, please read it first because they are different. Not all the certifications are the same.

The certifications are for the specific activity that you're doing.

I hope that answers that question.

McNeace, Meche - ETA CTR 59:27

Perfect. Thank you.

Alright. Next question is the recording for module one training last week uploaded yet and basically on the COP and I believe the recording will be or has been uploaded as of today. The transcript has not been uploaded as of yet, but that is coming. But the recording I believe Kevin has worked on that.

And has posted it on the COP and he put the link, and he said it sure is.

It's in the chat.

That's the next one.

I think so far, if I'm not mistaken, I think that's all we have in the chat. I believe there was somebody who wanted to ask a question.

Earlier on.

Barcley, Joyce M - ETA CTR 1:00:24

They may have had their question answered.

McNeace, Meche - ETA CTR 1:00:24

No.

okay, well.

I believe that's it, Joyce. If I look, I'm going up and down.

I don't see any other.

Danko, Maureen 1:00:39

I would like to ask a question.

McNeace, Meche - ETA CTR 1:00:40

Oh yay.

Barcley, Joyce M - ETA CTR 1:00:41

Super.

Danko, Maureen 1:00:43

I I'm trying to understand the roles of the grantees sub grantees.

When I came on as a project director for our program, the two previous project directors were not removed.

And there is no Grantee Administrator for us now at all.

So do how do I submit a help request is do I have to submit a ticket?

Barcley, Joyce M - ETA CTR 1:01:10

Yeah, the Grantee Administrators.

We as users cannot establish Grantee Administrators.

That has to be done through a Zendesk ticket.

McNeace, Meche - ETA CTR 1:01:20

Oh.

Danko, Maureen 1:01:20

Well, are you saying Zendesk ticket okay.

Barcley, Joyce M - ETA CTR 1:01:23

Yes, Zendesk ticket. Yeah. Hope desk.

McNeace, Meche - ETA CTR 1:01:25

So what we're gonna do is we're gonna we're we'll put that link in the chat.
That's where you will you can send in a request to have and see who are the grant administrators associated with that grant and or that sub grantee and then if you're supposed to be a sub Grantee Administrator, they can help you get set up and get everything squared away with you.

Danko, Maureen 1:01:50

Perfect. Thank you.

McNeace, Meche - ETA CTR 1:01:51

You're most welcome.

Let's see.

There is a question where do I find the IDL and that came from Iris Walker?

Barcley, Joyce M - ETA CTR 1:02:09

Well, Iris, coincidentally, the grantees tab on the navigation page is where you would find what has been entered in the system. And as you can see, oops, you had it open there.

Chanel, click on grantees and click on the grantee and scroll all the way down.

And we have the durational limit policies are listed there. And again those duration of limit policies are submitted to the Department of Labor every year with your grant application and from there is where they the policies get uploaded into GPMS.

So if you don't see any policies there, then I would submit a Zendesk ticket again asking that it be uploaded.

Has to have an IDL policy.

Individual Durational Limit policy for their grant.

McNeace, Meche - ETA CTR 1:03:12

All right.

I think so far that is the last question in the chat.

I don't see anything else, Joyce.

Barcley, Joyce M - ETA CTR 1:03:28

Great. Well, we're starting to get thank you.

So thank you everyone for participating today and again tomorrow we will be reviewing the case manager and case Supervisor, Admin Console and all of the wonderful functions that they provide.

McNeace, Meche - ETA CTR 1:03:34

It is.

Barcley, Joyce M - ETA CTR 1:03:46

So we hope you can join us tomorrow at 2:00 PM and again, it will probably last about an hour as well. So, thank you and we look forward to seeing you tomorrow.

Mauro, Kevin M - ETA CTR stopped transcription