Commonwealth of Kentucky
Release 4 Business Connect Training
February 2019

Agenda

Release 4.1 Training Agenda		
Module:	**Content:**	**Duration:**
Introduction	• Purpose and benefits of Release 4.1 • New functionalities with 4.1 • Key differences between Releases 3 and 4.1 • Provider Types • Business Connect Best Practices • Business Connect User Lifecycle	15 minutes
Basic Navigation	• CE and SNAP Dashboards • CE and SNAP + ETPL Dashboards	15 minutes
Onboarding Application	• Onboarding application lifecycle • Organization details, point of contact, and path selection • Different paths and organization types available • Onboarding application approval process	30 minutes
Business Connect User Roles	• Contact and Admin role permissions and responsibilities • New admin functionality with Release 4.1 • Adding chapters and creating contacts • Requesting to be a training provider if an existing CE or SNAP provider	15 minutes
Documents Verification	• How to upload documents in Business Connect • Required documents to publish Offerings • Document statuses • Document verification and approval process	30 minutes
Offerings Management	• What is an offering versus an opportunity? • Types of offerings in Business Connect: ITA Trainings and Registered Apprenticeships • Creating an Offering in Business Connect • Location, Performance, Ratings, and Contact information	30 minutes
Opportunity Management	• What is an opportunity? • Types of opportunities • Creating an opportunity in Business Connect	15 minutes

Welcome and Thank you!

Training Objectives

By the end of training, you should be able to:

Business Connect Training Objectives:

- ❖ Comprehend how to navigate through the Business Connect system
- ❖ Successfully determine how to onboard a Business Partner, enroll in opportunities, create offerings, and develop an administrative profile

R4.1 Business Connect Modules	
1. Introduction	**2. Navigation**
3. Onboarding	**4. Profile Administration**
5. Document Verification	**6. Offerings Management**
7. Opportunity Management	

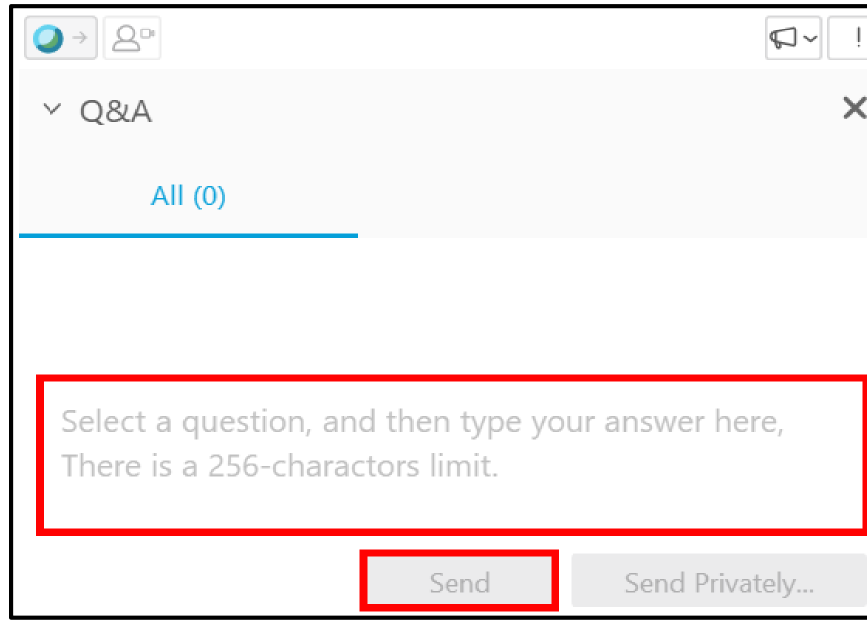
Housekeeping

Respectful Environment

The goal of this course is to provide you with guidance and support for working through Business Connect. Please make sure to be on mute to avoid background noise and remain engaged throughout the entire webinar.

Questions

There is designated time for questions in each module. Please feel free to ask questions during the training. Questions that can't be immediately addressed are put in the parking lot.



System Suggestions

While the system will not be changed for February 2, we encourage any system suggestions you may have for future releases. We will be collecting suggestions and taking them back to the team for further review.

Module One

Introduction

Module One Lesson Objectives

In the first module of this training, we discuss:

Module One: Introduction

- ❖ Outlining the Business Connect functionalities
- ❖ Explain how business partners may promote their services through a portal citizens will frequently be utilizing
- ❖ Introduce the different types of providers

Module One Summary

The purpose of this module is to outline the purpose and basic functionalities of Business Connect. This module will provide users with knowledge to understand why this portal will be convenient for their business.

KEE Suite Overview

With Release 4, KEE Suite becomes the complete case management system for Workforce Case Managers to manage work requirements for citizens looking to meet their SNAP/Medicaid requirements and for job seekers looking for help with services and career guidance.

KEE Suite

Citizen Connect	Business Connect	Staff Connect
Citizens may report work requirement activities, and with Release 4, citizens may complete tasks, takes tests, complete registration, and have full access to their information	Business Partners post opportunities for WIOA citizens and citizens receiving Medicaid to fulfill PATH requirements. Training providers post Offerings and enroll citizens in WIOA training	Staff register citizens, conduct assessments, determine WIOA eligibility, create employment plans, manage a citizen’s case, and add services to citizen's profile

Release 4.1

Several new functionalities are introduced with Release 4.1 Business Connect.

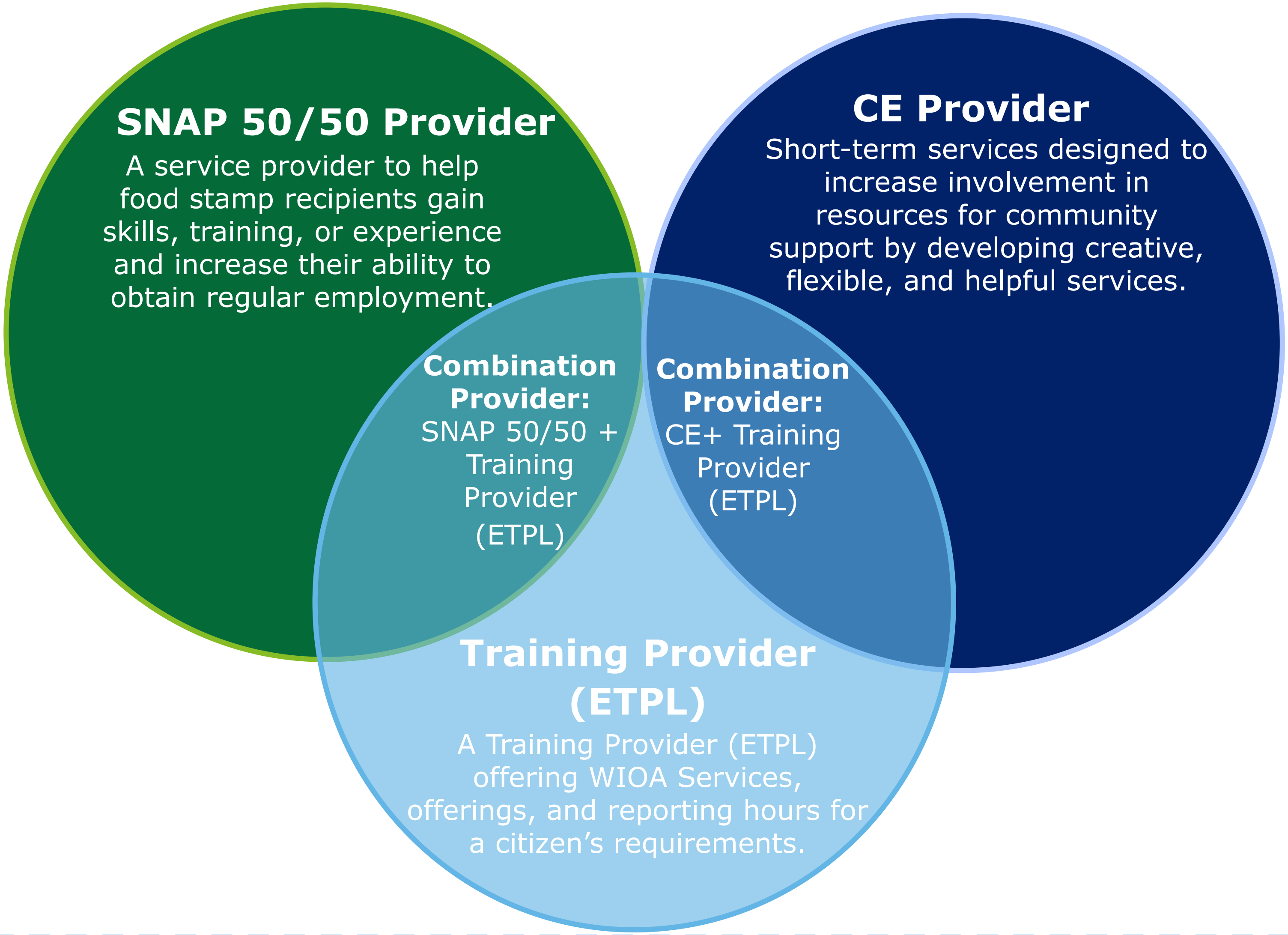
Business Connect can be beneficial to users and organizations by:

- **Increasing participation in a user's organizations events**
- **Encouraging involvement in the WIOA Program Services**
- **Offering opportunities to the community for beneficial assistance**
- **Providing support for Kentuckians to excel in the professional world**

7/1/18 Business Connect Functionality	2/1/19 Business Connect Functionality
• Allows CE and SNAP 50/50 providers to complete onboarding application • Allows CE and SNAP 50/50 providers to create and post opportunities • Different types of providers: CE and SNAP 50/50 *Release 3 Business Partners may request additional functionality in Release 4.1 to post WIOA Offerings.	• Expands onboarding application to Training Providers (ETPL) • Allows existing Business Partners to be able to request to be a training provider • ETPL providers may create and post Offerings *Business Partners that are new to Business Connect in Release 4.1 must submit an onboarding application and get approved by the State.

Venn Diagram of Provider Types

There are a few different providers an organization can be involved with including SNAP 50/50, CE, Training Provider (ETPL), and combination provider.



For the 2/1 release, providers cannot be ETPL alone. If a provider wishes to be ETPL on 2/1, they must onboard as one of the types of combination providers.

Business Connect User Lifecycle

After submitting an onboarding application and gaining State approval, Business Partners have the ability to upload documents, create opportunities, and create offerings.

1 Submit Onboarding Application Online

To become a Business Partner, a point of contact from the organization completes and submits an **onboarding application online** from the Business Connect site. The State reviews and accepts/rejects the application.

2 KOG Registration

If approved by the State, the point of contact receives an email with instructions to register on **Kentucky Online Gateway (KOG).** Registering in KOG allows the point of contact to log in to Business Connect as a Business Partner.

3 Login to Business Connect

Business Partners use the KOG username and password created to **log in** to Business Connect.

4 Set up Profile

Contacts with appropriate access may create and manage multiple **chapters** (locations) within the profile, as well as create contacts (users) and assign them to their respective chapters. Every contact created must register on KOG.

5 Create Opportunities

Business Partners may create **multiple opportunities** in Business Connect with the description, location, date, and opportunity details. After the opportunity occurs, Business Partners may verify attendance of registered citizens.

6 Upload Documents

Business Partners may upload documents in Business Connect. In order to create Offerings, Business Partners must upload Equal Opportunity Plan and a strategic plan to work with individuals with limited English proficiency for State approval.

7 Create Offerings

After verifying documents, Business Partners may create offerings including ITA Trainings and Registered Apprenticeships for State Office approval.

8 Work with Interfaces

Business Partners may upload opportunities to Citizen Connect and Staff Connect and offerings to Staff Connect.

Providers

There are a few different providers an organization can be involved with. These different paths will bring different faces to each screen in Business Connect:

Community Engagement Provider

Short-term services designed to increase involvement in resources for community support by developing creative, flexible, and helpful services.

SNAP 50/50 Provider

A service provider to help food stamp recipients gain skills, training, or experience and increase their ability to obtain regular employment.

Eligible Training Provider

A training provider offering WIOA Services, offerings, and reporting hours for a citizen's requirements.

Combination Provider

A business partner may be CE or SNAP 50/50 standalone.
A business partner may be CE + ETPL or SNAP 50/50 + ETPL.
For the 2/1 release, a business partner cannot be ETPL alone.

Providers

There are a few different providers an organization can be involved with. These different paths will bring different faces to each screen in Business Connect:

Community Engagement Provider

Short-term services designed to increase involvement in resources for community support by developing creative, flexible, and helpful services.

SNAP 50/50 Provider

A service provider to help food stamp recipients gain skills, training, or experience and increase their ability to obtain regular employment.

Eligible Training Provider

A training provider offering WIOA Services, offerings, and reporting hours for a citizen’s requirements.

Combination Provider

A business partner may be CE or SNAP 50/50 standalone.
A business partner may be CE + ETPL or SNAP 50/50 + ETPL.
For the 2/1 release, a business partner cannot be ETPL alone.

Providers

There are a few different providers an organization can be involved with. These different paths will bring different faces to each screen in Business Connect:

Community Engagement Provider

Short-term services designed to increase involvement in resources for community support by developing creative, flexible, and helpful services.

SNAP 50/50 Provider

A service provider to help food stamp recipients gain skills, training, or experience and increase their ability to obtain regular employment.

Eligible Training Provider

A training provider offering WIOA Services, offerings, and reporting hours for a citizen's requirements.

Combination Provider

A business partner may be CE or SNAP 50/50 standalone.
A business partner may be CE + ETPL or SNAP 50/50 + ETPL.
For the 2/1 release, a business partner cannot be ETPL alone.

Providers

There are a few different providers an organization can be involved with. These different paths will bring different faces to each screen in Business Connect:

Community Engagement Provider

Short-term services designed to increase involvement in resources for community support by developing creative, flexible, and helpful services.

SNAP 50/50 Provider

A service provider to help food stamp recipients gain skills, training, or experience and increase their ability to obtain regular employment.

Eligible Training Provider

A training provider offering WIOA Services, offerings, and reporting hours for a citizen’s requirements.

Combination Provider

A business partner may be CE or SNAP 50/50 standalone.
A business partner may be CE + ETPL or SNAP 50/50 + ETPL.
For the 2/1 release, a business partner cannot be ETPL alone.

Quick Icons on Home Screen

The following Quick Icons are available on the main screen of Business Connect:

Icon	Description
More Access Links	The More Access Link icon takes the Business Partner to the portal where they can apply for more access within the system.
My Opportunities	The Opportunities icon displays the opportunities available by the Business Partner themselves, along with others within the Business Connect portal.
Notifications	The Notifications icon displays alerts, news, or notices that Business Partner's are subscribed to and/or to keep on their radar in Business Connect.
Avatar	The Avatar icon shows the options to take the Business Partner back to the home screen or it can let the Business Partner log out.

What is WIOA?

The Workforce Innovation & Opportunity Act (WIOA) is designed to help job seekers gain access to services to allow them to succeed in the labor market. WIOA programs and partners are available to promote workforce development through a one stop delivery system.

Business Connect Best Practices

Below are some of the best practices to remember when using Business Connect:

Business Connect Best Practices

- Google Chrome is the preferred browser for Business Connect.
- For a new provider, use an email address related to the Point of Contact to avoid duplicate email addresses, resulting in a rejected onboarding application.
- ETPL providers who are not interested in being a SNAP 50/50 provider should choose the onboarding path of CE + ETPL.
- Make sure that the FEIN number used is not shared with any other entity. Many organizations share an FEIN, but are not related, remember to double check you are using the correct entity.
- KCC.ky.gov is where supplemental materials are located.

Module One Knowledge Check

Knowledge checks are used to test your knowledge of the skills.

Knowledge Check #1

1. What is the preferred browser for Business Connect?

A. Internet Explorer
B. Google Chrome
C. Firefox
D. Microsoft Edge

2. All of the following are types of onboarding application paths in Business Connect, EXCEPT:

A. PATH
B. ETPL
C. Community Engagement
D. SNAP 50/50

3. Which of the following are functionalities in Business Connect:

A. Create opportunities
B. Create offerings
C. Document upload
D. All the Above

Module One Knowledge Check

Knowledge checks are used to test your knowledge of the skills.

Knowledge Check #1

1. **What is the preferred browser for Business Connect?**
   A. Internet Explorer
   B. Google Chrome
   C. Firefox
   D. Microsoft Edge

2. **All of the following are types of onboarding application paths in Business Connect, EXCEPT:**
   A. PATH
   B. ETPL
   C. Community Engagement
   D. SNAP 50/50

3. **Which of the following are functionalities in Business Connect:**
   A. Create opportunities
   B. Create offerings
   C. Document upload
   D. All the Above

Module Two

Navigation

Module Two Lesson Objectives

In the second module of this training, we discuss:

Module Two: Navigation

- ❖ Review Navigation for Business Partner Onboarding
- ❖ Discuss different Business Connect dashboards

Module Two Summary

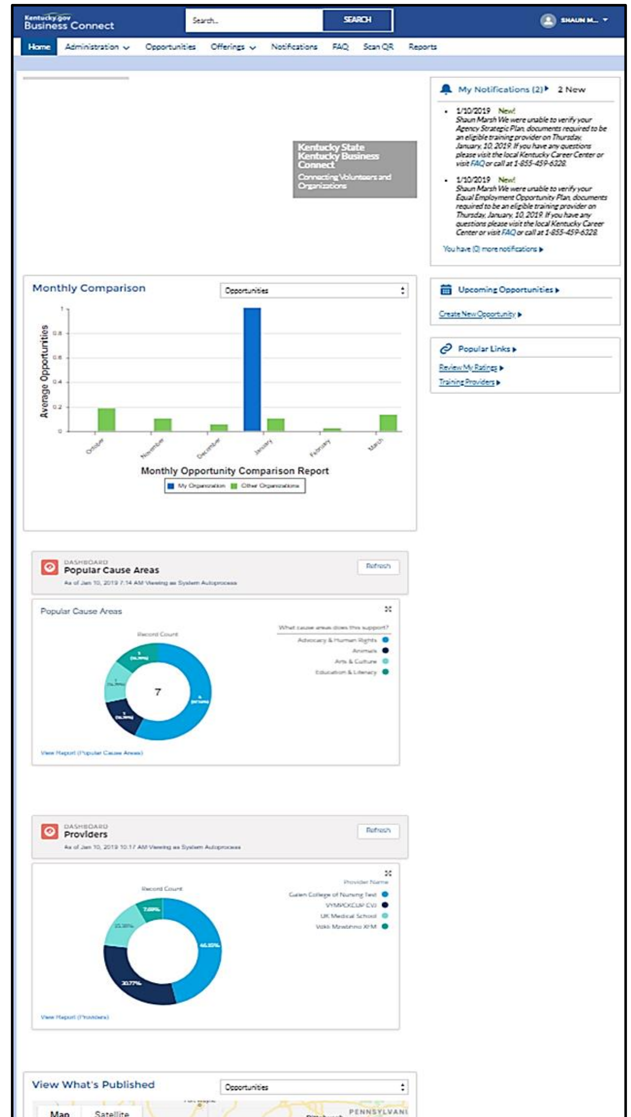
The purpose of this module is to provide descriptions for Users to navigate through the Business Connect system. The onboarding application, dashboards for each path, offerings, opportunities, and profile administration navigations will be prescribed.

Basic Navigation

Users of Business Connect have a wide array of functionality to benefit their organizations. When a user logs in, the Home Screen will display:

CE/SNAP Only

CE/SNAP +ETPL



Basic Navigation for only CE or SNAP Providers

Users of Business Connect have a wide array of functionality to benefit their organizations. When a user logs in, the Home Screen for a Community Engagement and SNAP providers will display:

CE or SNAP only

- Monthly Opportunity Comparison
- Popular Cause Areas
- Published Opportunities
- My Notifications
- Upcoming Opportunities
- More Access Links

Other subtabs include:

- **Administration**
- **Opportunities**
- **Notifications**
- **FAQ**
- **Scan QR**
- **Reports**

The Policy Manager role and State approval role can both approve in Staff Connect. **The State will typically approve SNAP 50/50 and Community Engagement applications**

Basic Navigation for CE or SNAP plus ETPL Providers

Users of Business Connect have a wide array of functionality to benefit their organizations. When a user logs in, the Home Screen for a Community Engagement and SNAP plus Training providers (ETPL) will display:

CE or SNAP + Training Providers (ETPL)

- **Monthly Comparison (Opportunities and Offerings)**
- **View What's Popular (providers and cause areas)**
- **Published Opportunities and Offerings**
- **My Notifications**
- **Upcoming Opportunities**
- **More Access Links**

Other subtabs include:

- **Administration**
- **Opportunities**
- **Offerings**
- **Notifications**
- **FAQ**
- **Scan QR**
- **Reports**

The Policy Manager role and State approval role can both approve in Staff Connect. **Policy Management will typically approve ETPL provider applications.**

System Demonstration

Module Two Knowledge Check

Knowledge checks are used to test your knowledge of the skills.

Knowledge Check #2

1. **What are the major differences between the CE/SNAP dashboard and the CE/SNAP + ETPL dashboard?**
    A. The comparison
    B. Popular Causes
    C. Notifications
    D. Both A & B

2. **Home screens for all different providers are the same.**
    A. True
    B. False

3. **Do Community Engagement providers plus ETPL providers have access to the offerings tab?**
    A. Yes
    B. No

Module Two Knowledge Check

Knowledge checks are used to test your knowledge of the skills.

Knowledge Check #2

1. **What are the major differences between the CE/SNAP dashboard and the CE/SNAP + ETPL dashboard?**
   A. The comparison
   B. Popular Causes
   C. Notifications
   D. Both A & B

2. **Home screens for all different providers are the same.**
   A. True
   B. False

3. **Do Community Engagement providers plus ETPL providers have access to the offerings tab?**
   A. Yes
   B. No

Module Three

Onboarding

Module Three Lesson Objectives

In the third module of this training, we discuss:

Module Three: Onboarding

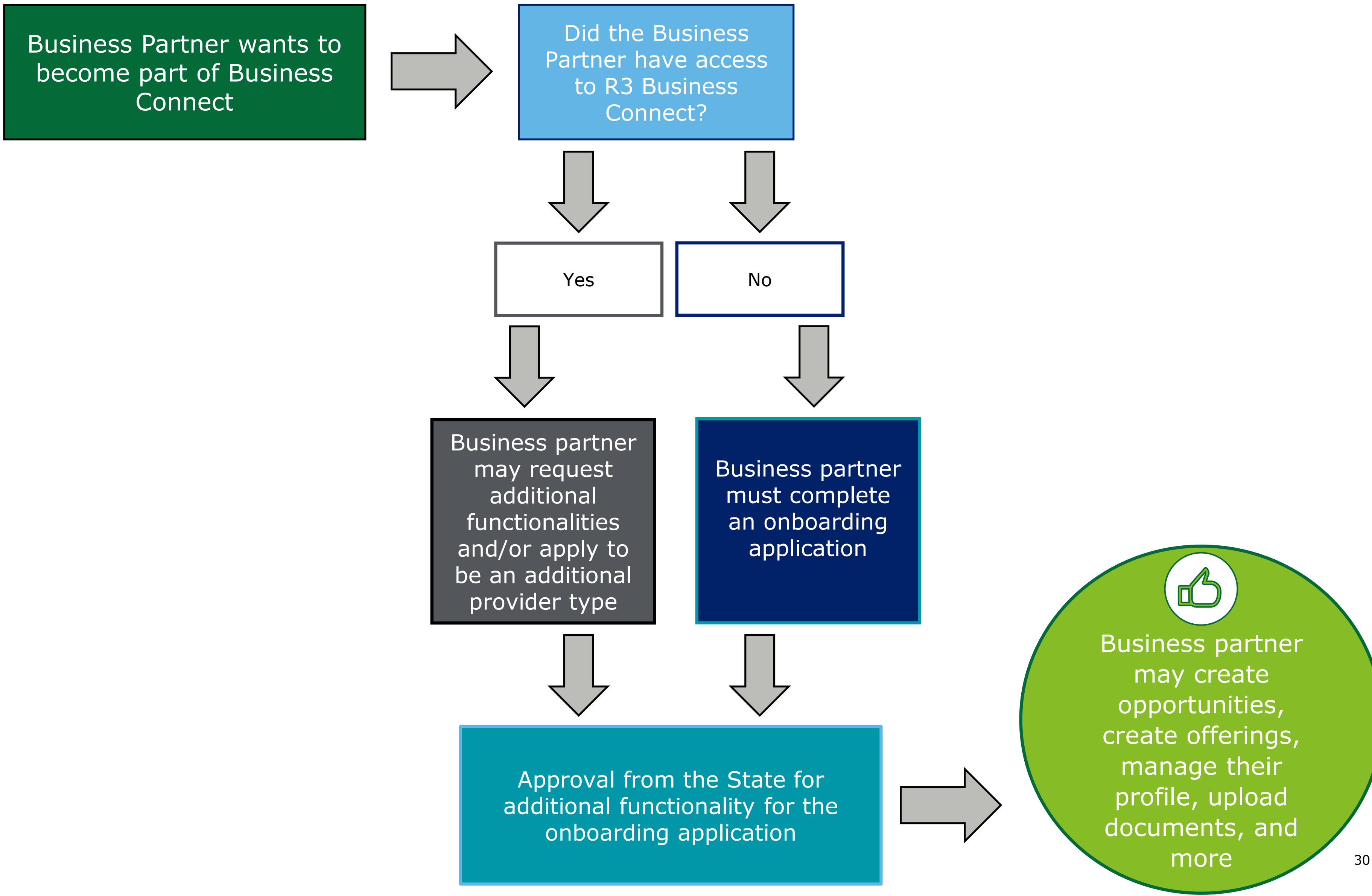
- ❖ Detail the Onboarding process for a Business Partner
- ❖ Recognize the Onboarding application flow
- ❖ Summarize the application approval process
- ❖ Determine which path is the right choice for each Business Partner

Module Three Summary

This module is to discuss the details a potential Business Partner will need to enter when attempting to onboard in the Business Connect system. The steps for a Business Partner receiving extra functionality in the system will be detailed throughout this module.

The Onboarding Application

Business Partners that have never used Business Connect before Release 4.1 must request access through an onboarding application.



Onboarding Application

The Onboarding Application is accessed by clicking the "Sign Up" Hyperlink on the top right corner of the Business Connect landing screen.

The onboarding application lifecycle is as follows:

Business partner completes onboarding application → Email is sent to primary applicant with tracking number → Lead is created and system validations are performed → Approver reviews lead and either approves or rejects the application

There are 3 components of the onboarding application:

1. **Organization Details**
2. **Point of Contact**
3. **Path (CE, SNAP 50/50, Training Provider (ETPL))**

When completing the Business Partner Application, the user can try and register as the following:

- **Non-Profit:** Feeding America Food Banks
- **For-Profit:** Starbucks Coffee
- **MCO:** Humana Health Insurance for Medicaid
- **SNAP 50/50:** Boys and Girls Club
- **Career Center:** Kentucky Career Center Owensboro

Onboarding Application

The components of the Onboarding Application are shown below:

Application › Path › Subcategory › Approval

1 Sign Up	2 Checks	3 Review	4 Approve/ Reject	5 Email
Primary Contact of the business submits the application	A lead is generated in Staff Connect and verification process starts	If verification is done, the lead is sent to the State approval role queue where the onboarding application is reviewed	The State then Approves/ Rejects the request	Primary Contact receives an Approval email with KOG link, if the application is approved

Organization Details

This is the first step of the application where the user enters the information about the unverified Business Partner

Point of Contact

This is the second step of the application where the user enters all the details for the potential Business Partners Point of Contact

The Path

This is the third step of the application where the user enters the path they would prefer to take if onboarded to the Business Connect portal

Please Note: The Business Connect User may already have access to the portal from Release 3 functionality. If this is the case, the User may also request additional functionality.

Path Decision

Once navigated to the "Path" screen, the user selects one of the three following paths:

Application | **Path** | Subcategory | Approval

SNAP 50/50

- A service provider to help food stamp recipients gain skills, training, or experience and increase their ability to obtain regular employment.

Community Engagement (CE)

- Short-term services designed to increase involvement in resources for community support by developing creative, flexible, and helpful services.

Training Provider (ETPL)

- A Training Provider (ETPL) offering WIOA Services, offerings, and reporting hours for a citizen's requirements.

Combination Provider

- A business partner may be CE or SNAP 50/50 standalone.
- A business partner may be CE + ETPL or SNAP 50/50 + ETPL.
- For the 2/1 release, a business partner cannot be ETPL standalone.

Organization Subcategories

When utilizing the Business Partner Application, the user can try and register within the organization subcategory as the following:

Application → **Path** → **Subcategory** → **Approval**

Non-profit	**Non-Profit organizations include 3rd party providers who may possess a contract with the state for non-profit purposes**
For-Profit	**For-Profit organizations include 3rd party providers who may possess a contract with the state for-profit purposes**
Managed Care Organizations	**Managed Care Organizations (MCOs) include medical service providers who offers managed care health plans**
Snap 50/50	**SNAP 50/50 organizations are created to help food stamp recipients gain skills, training, or experience to increase their ability to obtain employment**
Career Center	**Career Center organizations provide services to help support citizens. They may be enrolled in services to have financial support for trainings and certifications**

Some organizations may fall into more than one category. If this is the case, the organization should select the most restrictive category that is applicable. For example, if a SNAP 50-50 organization is both non-profit and SNAP 50-50, they should select "SNAP 50-50" on their onboarding application as SNAP 50-50 is more restrictive than non-profit.

Training Provider (ETPL) Questions

Once navigating through the Path section, if “Training Provider” is chosen as the path, the User will be navigated through the **additional** questions below. A Training Provider (ETPL) will still be prompted to answer the questions for SNAP 50/50 and CE in addition to the questions below.

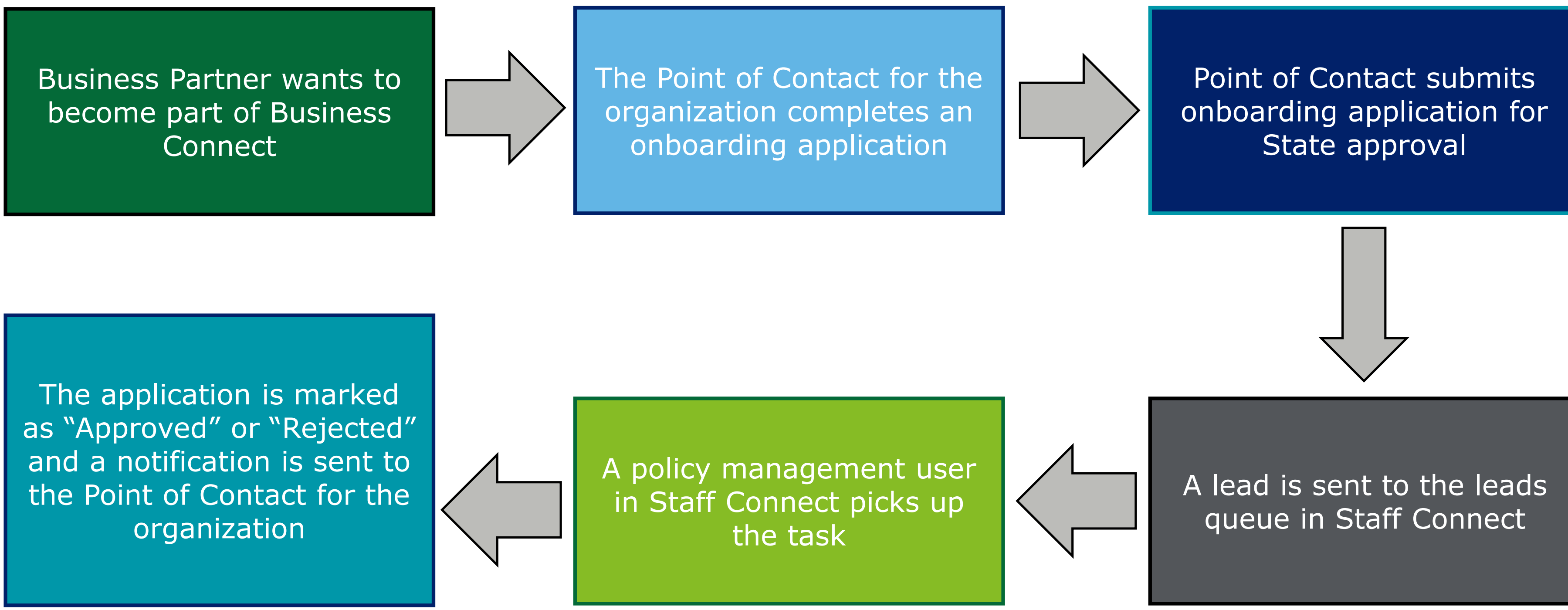
Question	Description
Eligible Organization Type	Under WIOA, the four types of organizations include Education Agency, Proprietary Education, Registered Apprenticeship or Other
Year	The year the organization was established
License Number	The proprietary license number of the training provider
Refund Status	Displays whether or not a refund for service participants is offered and if so, an explanation will be required
Barriers to Employment	Ways in which the organization is able to provide services to individuals who face barriers to employment
Development of Partnerships	Describes how this organization partners with local businesses in the context of providing services
Aligned Services	How the services that the organization provides are designed to support participants in developing skills that are in industry sectors and occupations that are in demand in the local area
Compliance with ADA	Ensures the organization is in compliance with the Americans with Disabilities Act. The ADA prohibits discrimination against people with disabilities and guarantees that they have the same opportunities as everyone else to participate in employment and in State and local government programs and services
Site Access	Whether the site of the proposed training is accessible to people with limited mobility
KY Stats Reporting	How the organization collects data for submission to KY Stats in annual reporting

The above questions are only for combination providers (CE or SNAP and Training Providers (ETPL) in the system.

Approval Process

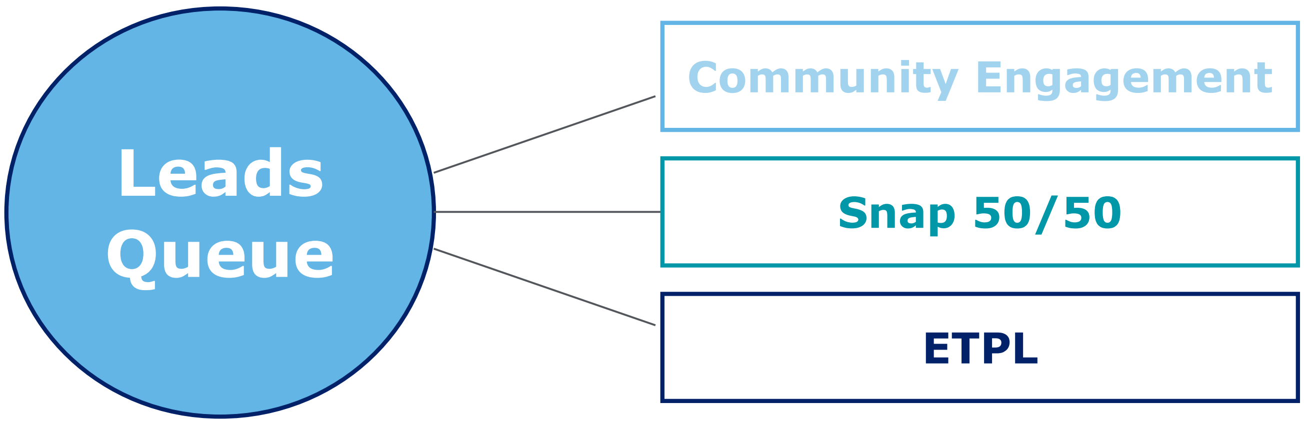
The onboarding application must be approved by the State before the business partner gains access to Business Connect. The provider type dictates who approves the application within the State.

Application | **Path** | **Subcategory** | **Approval**



Approval Process & Application Status

Every onboarding application goes to one leads queue in Staff Connect. This is one queue that has 3 different filtered list views (non-snap, snap, and training provider). All approvers with the policy management user role in Staff Connect have access to this queue and list views.



An onboarding application may possess the following statuses:

Onboarding Application Status	Description
Under Review	All the onboarding applications that have not yet been reviewed by the staff worker.
Approved	Onboarding applications that have been reviewed by the staff worker and were approved.
Rejected	Onboarding applications that have reviewed by the staff worker and were rejected or rejected by system validations.
Cancelled	Onboarding applications that were cancelled by the business partner primary contact.

System Demonstration

Module Three Knowledge Check

Knowledge checks are used to test your knowledge of the skills.

Knowledge Check #3

1. **Which of the following is one phase of the 3 phases for a Business Partner to complete the onboarding application?**
   A. Organization Details
   B. Path
   C. Point of Contact
   D. All the above

2. True or False: If an organization falls under both non-profit and MCO, they should select "MCO" when selecting their organization type during the onboarding process.
   A. True
   B. False

3. ETPL organizations are able to do the following with Business Connect 4.1:
   A. Create Offerings
   B. Upload Documents
   C. Update Profile
   D. All of the Above

Module Three Knowledge Check

Knowledge checks are used to test your knowledge of the skills.

Knowledge Check #3

1. **Which of the following is one phase of the 3 phases for a Business Partner to complete the onboarding application?**
   A. Organization Details
   B. Path
   C. Point of Contact
   D. All the above

2. True or False: If an organization falls under both non-profit and MCO, they should select "MCO" when selecting their organization type during the onboarding process.
   A. True
   B. False

3. ETPL organizations are able to do the following with Business Connect 4.1:
   A. Create Offerings
   B. Upload Documents
   C. Update Profile
   D. All of the Above

Module Four

Business Connect User Roles

Module Four Lesson Objectives

In the fourth module of this training guide, we discuss:

Module Four: Business Connect User Roles

- ❖ Establish the opposing profile roles
- ❖ Describe functionality for each role in the Business Connect system
- ❖ Explain the creation of new chapters and onboarding new contacts
- ❖ Distinguish the process to be a training provider if an existing CE or SNAP provider

Module Four Summary

This module is to discuss the opposing User Roles within the Business Connect system. Module five determines onboarding new chapters, functionalities for each specific role, and the process of requesting more advanced access.

Business Connect User Roles

There are 2 user roles in Business Connect: Admin and Contact.

Admin	Contact
• The first person to apply for an organization in Business Connect • The highest level of permissions within the organization being able to see all chapters, contacts, and opportunities associated with their organization • The primary point of contact for the organization during the onboarding application • The ability to add other users to their organizations as either admins or contacts • The ability to create new chapters, add new contacts and admins, add new chapters • Create registrations for all opportunities associated with their organization • Mark attendance for opportunities	• Contacts are associated with chapters and will only be able to see the chapter in which they belong in the system • There can be multiple admins and contacts for an organization • The ability to edit their own contact profile (except email and chapter), create/cancel opportunities and time slots for their chapter, create/cancel individual registrations to opportunity timeslots for their chapter, and perform verification of opportunity attendance for their chapter's opportunities • The contact can only view their own chapter and opportunities within the system

Starting 2/1/19, the Administrator is given the functionality to request to be a Training Provider (ETPL) if they are an existing CE or SNAP 50/50 provider.

Admin versus Contact functionality

Different users have different levels of permissions in Business Connect based on whether they are a contact or an admin.

Functionality:	Admin:	Contact:
Create/Cancel opportunities for the chapter	√	√
Create/Cancel individual registrations to opportunity timeslots for the chapter	√	√
Perform verification of individual participation in opportunities for the chapter	√	√
Edit their own profile	√	√
Upload documents for their organization	√	√
Create offerings for their organization	√	√
View all chapters, contacts, and opportunities associated with an organization	√	
Create/Cancel opportunities and individual opportunity registrations for all chapters within the organization	√	
Perform verification of individual participation for opportunities for all chapters within the organization	√	
Add new chapters, onboard new admins and contacts	√	
Request to be a Training Provider (ETPL) if they are an existing CE or SNAP 50/50 provider	√	

Creating a Chapter

A user with the admin role for their organization has the ability to create a new chapter under their organization in the system.

An admin may follow the process below in order to add a new chapter to the system:

1. Navigate to the "Administration" tab in Business Connect
2. Click on "Chapters" to view a list of all chapters currently in the system for the organization
3. Click "New" in the top right corner of the screen
4. Enter all fields for the new chapter, including name, phone number, and physical address and click "Save"

After creating the new chapter, the admin may add contacts to the chapter by following the process below:

1. Navigate to the "Administration" tab in Business Connect
2. Click on "Chapters" to view a list of all chapters in the system for the organization
3. Click on a specific chapter name's hyperlink
4. On the chapter's "Detail" tab, the admin or contact may click "Edit" to edit the chapter's information
5. Navigate to the chapter's "Contacts & Opportunities" tab to view all contacts and opportunities for that chapter
6. On this screen, admin or contacts may click "New" under the "Contacts" section of the screen to add a new contact to the chapter

Creating a Contact or Admin

The admin has their account created during the onboarding application as the first person to apply for an organization's access to the system. After the admin gets access, they may add other users as contacts or admins for their organization.

An admin may follow the process below in order to add a new contact or admin to the system:

1. Navigate to the "Administration" tab in Business Connect
2. Click on "Contacts" to view a list of all contacts currently in the system for the organization
3. Click "New" in the top right corner of the screen
4. Enter the contact's information on the "New Individual" popup including job title, name, contact information, etc.
5. Select the new individual's "Access Level" as admin or contact
6. Click "Save" to save the new individual into the system. A link is sent to the new user to register
7. The user's status defaults to "Pending Activation"
8. The user's status changes to "Active" once they sign up and activate their user account in Business Connect

After the user is created in the system, the following actions are available:

Edit:

A contact may edit their own information by clicking "Edit" on their individual profile

Activate:

If a user is inactive, the admin may click "Activate" on the user details screen. This will trigger an activation link to be sent to the user.

Deactivate:

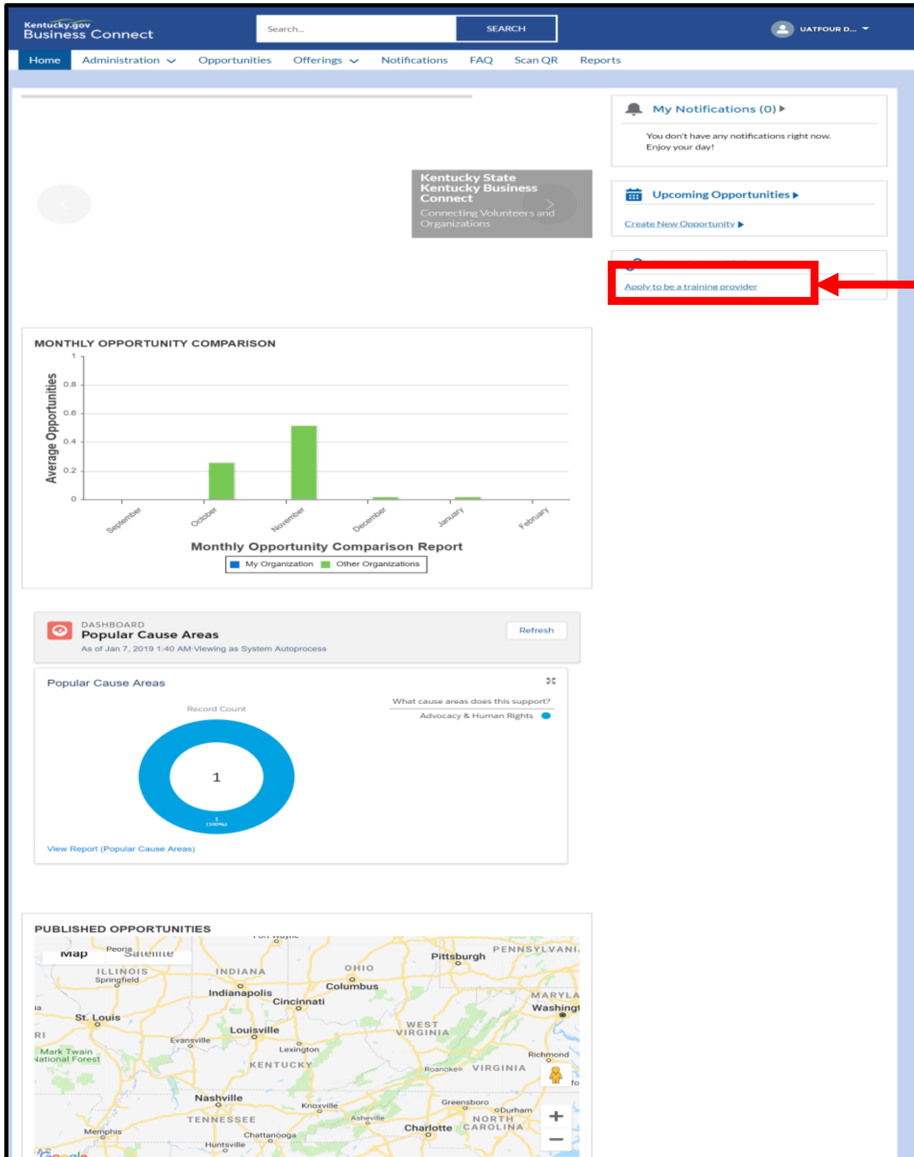
If a user is active and should be inactive, the admin may click "Deactivate" on the user details screen and provide a reason for deactivation. Their profile is then read only.

Resend Registration Link:

If the status of the user remains "Pending Activation" the admin may click "Resend Registration Link" to send the link again.

Requesting to be a Training Provider (ETPL)

Organizations that are already in the system as CE or SNAP providers may request to be a training provider (ETPL) after 2/1.



Organizations that are already in the system as CE or SNAP providers may request to be a training provider (ETPL) by clicking on the **"Apply to be a Training Provider"** button on the home screen.

After going through the application process and answering the additional questions required to be a training provider, the application will go to the leads queue to be approved by the State.

After approved by the State, the organization will become a combination provider (SNAP and CE plus Training Provider ETPL).

System Demonstration

Module Four Knowledge Check

Knowledge checks are used to test your knowledge of the skills.

Knowledge Check #4

1. Once the User has created an account, their functionality includes which of the following?

A. Edit
B. Resend Registration Link
C. Cancel
D. Both A & B

2. Administrators and Contacts have all the same functionality.

A. False
B. True

3. If the Contact already has a profile but would like more access within the portal, they may:

A. Create a new account with the same point of contact
B. Apply for a new job
C. Request the administrator for more access
D. All the above

Module Four Knowledge Check

Knowledge checks are used to test your knowledge of the skills.

Knowledge Check #4

1. **Once the User has created an account, their functionality includes which of the following?**
   A. Edit
   B. Resend Registration Link
   C. Cancel
   D. Both A & B

2. **Administrators and Contacts have all the same functionality.**
   A. False
   B. True

3. **If the Contact already has a profile but would like more access within the portal, they may:**
   A. Create a new account with the same point of contact
   B. Apply for a new job
   C. Request the administrator for more access
   D. All the above

Module Five

Document Verification

Module Five Lesson Objectives

In the fifth module of this training guide, we discuss:

Module Five: Document Verification

- ❖ Describing documents to be uploaded by Business Partners
- ❖ Labeling the verification process for the documents to be uploaded
- ❖ Determining how the uploaded documents interact with the approval process for a Business Partner

Module Five Summary

In Module Five, Business Partners will go through what documents need to be uploaded and verified to work within the Business Connect portal. An overview on the approval process, and potential statuses for each document uploaded will be detailed in this module as well.

Document Verification

Once a business partner has registered for an account in Business Connect, they must have their account training documents verified. At this point, the Provider will need to verify their documents to be able to create offerings for citizens in the Business Connect portal.

There are 2 documents that are required before any training offerings can be approved:

1. Equal Employment Opportunity Plan, or another agency policy addressing non-discriminatory practices
2. Agency's strategic plan to work with individuals with limited English proficiency

*After a business partner has uploaded both documents, they may submit for verification to the State for review.

An document may possess the following statuses in Business Connect:

New

- Business Partner uploads the document, the document status is "New"

Pending Review

- Upon click of the "Submit" button on the "Verify My Document" screen, the status is set to "Pending Review"

Need More Information

- Upon click of the "Need More Information" button from the approval task, the status is set to "Need More Information"

Approved

- Upon click of the "Approved" button, the system will set the document status to "Approved"

The Business Connect user may delete the document within the "Document Summary" screen. A pop-up screen will appear when selecting a deletion of a document. The document may only be requested for deletion if the document is in "New", "Need more Information", or "Under Review" statuses. The document cannot be deleted if it has the "Approved" status.

Document Verification Process

Business partners may follow the process below in order to upload documents in Business Connect.

1. Navigate to the “Offering” tab from the home page
2. Select “Documents” on the “Offerings” tab
3. View the summary list of all documents already uploaded for that business partner
4. Click “New” to open the “New Document Upload” pop-up screen
5. Upload the documents and enter document name, document type, creation date, and document status
6. To submit a document for approval, click “Verify My Document” – this creates a task for staff to review the documents

In the instance a document possesses the value of “Need More Information” a notification will be sent the provider to dispense more information regarding their documents before they are able to utilize functionality in the Business Connect system.

System Demonstration

Knowledge checks are used to test your knowledge of the skills.

Knowledge Check #5

1. **What two documents are required to be uploaded and verified?**
    - A. CEO of Business Partners drivers license
    - B. A policy addressing non-discriminatory practices
    - C. A strategic plan
    - D. Both B & C

2. **Which of the following is NOT a potential status for a document?**
    - A. Almost verified
    - B. Pending review
    - C. Approved
    - D. All the above are potential options for a documents status

3. **A document can only be deleted in what status shown below?**
    - A. New
    - B. Pending review
    - C. Approved
    - D. Only A & B

Module Five Knowledge Check

Knowledge checks are used to test your knowledge of the skills.

Knowledge Check #5

1. **What two documents are required to be uploaded and verified?**
   - A. CEO of Business Partners drivers license
   - B. A policy addressing non-discriminatory practices
   - C. A strategic plan
   - **D. Both B & C**

2. Which of the following is NOT a potential status for a document?
   - **A. Almost verified**
   - B. Pending review
   - C. Approved
   - D. All the above are potential options for a documents status

3. A document can only be deleted in what status shown below?
   - A. New
   - B. Pending review
   - C. Approved
   - **D. Only A & B**

Module Six

Offerings Management

Module Six Lesson Objectives

In the sixth module of this training guide, we discuss:

Module Six: Offerings Management

- ❖ Analyze the offerings lifecycle process including how to create an offering and approve an offering
- ❖ Create, view, and edit offerings

Module Six Summary

This module provides an overview of different types of provider offerings, how to create them and to edit, and view an offering.

Opportunities VS. Offerings

Opportunities and Offerings are two different items within the system. An offering is a way to differentiate an opportunity because the offering utilizes funding. A detailed description is given below:

Opportunity	Offering
An Opportunity can be considered a program or event that furthers the skills of a citizen, **without** the means of funding. **Examples:** resume writing workshop, dress for success workshop **Provider types for an Opportunity:** CE, SNAP 50/50	Offerings are individualized training programs or Registered Apprenticeships. Offerings have funding tied to them. After business partners create offerings and gains state approval, the offerings are published to Staff Connect. In Staff Connect, case managers can enroll citizens into the offerings to help citizens gain skills necessary to gain and maintain employment. **Examples:** ITA trainings, registered apprenticeships **Provider types for an Offering:** CE + ETPL, SNAP 50/50 + ETPL

Offering Categories

Once a business partner registers on Business Connect through the onboarding application and has their documents verified, they can start creating Offerings and submitting their Offerings for approval. There are two types of Offerings that can be created in Business Connect: Trainings and Registered Apprenticeships that will lead the user to opposing screens.

1 Submit Onboarding Application

2 Upload Documents for Verification

3 Create Offerings

4 Submit Offerings for Approval

Training

Type of instructional learning through classroom or online education.

Registered Apprenticeship

A kind of job training that involves shadowing and studying with a master of the trade on the job instead of in school. Carpenters, masons, plumber, construction and many other professionals often learn their trade through apprenticeship.

Create an Offering

In order to create an Offering in Business Connect, a business partner must do the following:

Business Partner has onboarding application and documents approved in Business Connect → Business Partner navigates to the "Offerings" tab, selects "Program Offerings", and clicks "New" → Business partner enters relevant program details → Business partner submits offering for State review

→ Business partner uploads offering's student profile master data set to KY Stats → KY Stats sends the performance data to the State to approve → Once the State approves the offering and the performance data, the offering may appear in Staff Connect for staff to utilize

- The Business Partner may request to cancel the Offering. The Business Partner must provide a cancellation reason and the State may approve the cancellation. If the State does not approve the cancellation reason, the offering stays available. The Business Partner may resubmit a cancelation request updating their reasoning of cancelation.

- The Business Partner may request to edit the Offering. After making edits to the Offering, the business partner must resubmit for State approval.

- The Business Partner can click on the name of an Offering on the "Program Offering Summary" screen. By doing this, the Business Partner is able to view all details of the Offering including Performance data and Location information.

Offering Statuses

An offering may possess the following statuses in Business Connect:

New

For all Program Offerings which have not yet been submitted, status is set to “New” on the “New Offering” screen.

Pending Approval

On Clicking the “Submit Offering” button on the “View Offering Details” screen from Business Connect, status is set to “Pending Approval”.

Need More Information

On clicking the “Need More Information” button from the approval task, status is set “Need More Information.”

Active

On approving of Offerings, system will set the status to “Active”.

Pending Recertification

On triggering of recertification by Policy Management, status is set to “Pending Recertification.”

Pending Cancellation

On clicking the “Save” button from the “Cancellation” screen requested by the Business Partner, status is set to “Pending Cancellation.”

Closed

The status is set to “Closed” when the offering is no longer available.

ITA Training

The User has two different options to select from on the "New Offering" screen: ITA Training or Registered Apprenticeship. The "New ITA Training" screen will prepopulate with information from the current date. The User will be able to submit the Registered Apprenticeship for approval.

New Training Offering

The Offering Status and Record Type are prepopulated upon page load, along with the date field with the day of usage.

View Training Offering

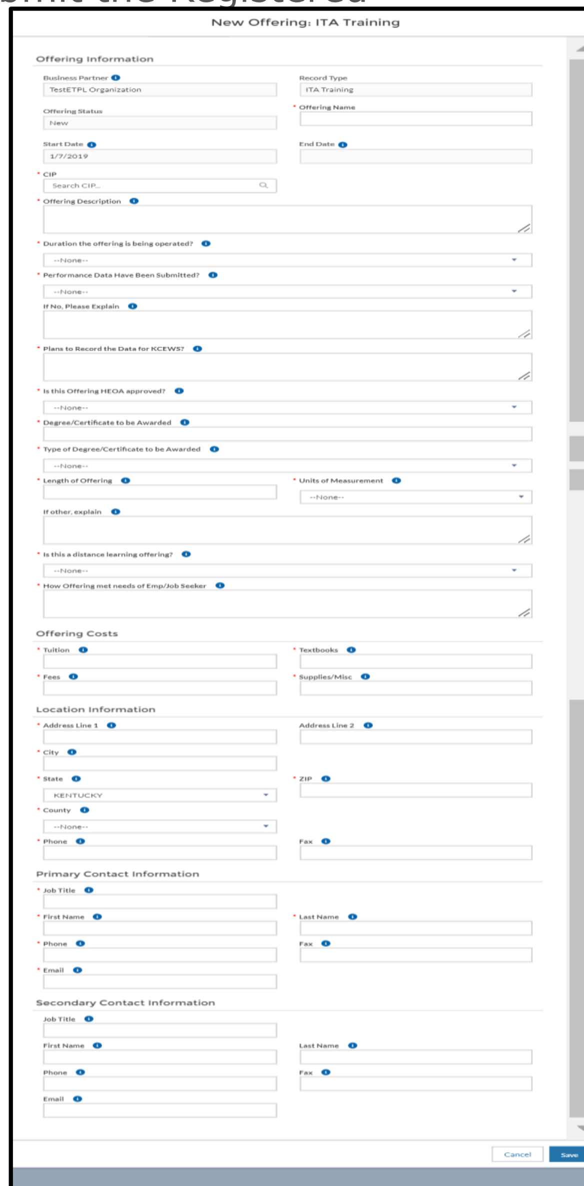
The Offering Record details will be viewed within this screen. There are two sections on this screen, one including the offering details, the other enticing organization details.

Training Program Summary

The Program Offering Summary screen provides the Business Partner with a summary list of all the Business Partners Program Offerings. A business Partner can create a new Offering, as well as managing previously created Program Offerings.

Edit Training Offering

All fields that are able to be entered when creating a New Training Offering will be editable when the edit button is selected.


New Offering: ITA Training

Offering Information

Business Partner
TestETPL Organization
Record Type
ITA Training
Offering Status
New
* Offering Name
Start Date
1/7/2019
End Date
* CIP
Search CIP...
* Offering Description
* Duration the offering is being operated?
--None--
* Performance Data Have Been Submitted?
--None--
If No, Please Explain
* Plans to Record the Data for KCEWS?
* Is this Offering HEOA approved?
--None--
* Degree/Certificate to be Awarded
* Type of Degree/Certificate to be Awarded
--None--
* Length of Offering
* Units of Measurement
--None--
If other, explain
* Is this a distance learning offering?
--None--
* How Offering met needs of Emp/Job Seeker

Offering Costs

* Tuition
* Textbooks
* Fees
* Supplies/Misc

Location Information

* Address Line 1
Address Line 2
* City
* State
KENTUCKY
* ZIP
* County
--None--
* Phone
Fax

Primary Contact Information

* Job Title
* First Name
* Last Name
* Phone
Fax
* Email

Secondary Contact Information

Job Title
First Name
Last Name
Phone
Fax
Email

Cancel
Save

KENTUCKY HEALTH

Registered Apprenticeship

The User has two different options to select from on the “New Offering” screen: ITA Training or Registered Apprenticeship. The “New Registered Apprenticeship” screen will prepopulate with information from the current date. The User will be able to submit the Registered Apprenticeship for approval.

New Registered Apprenticeship

On this screen, the Offering Status and Record Type are prepopulated upon page load, along with the date field with the day of usage.

View Registered Apprenticeship

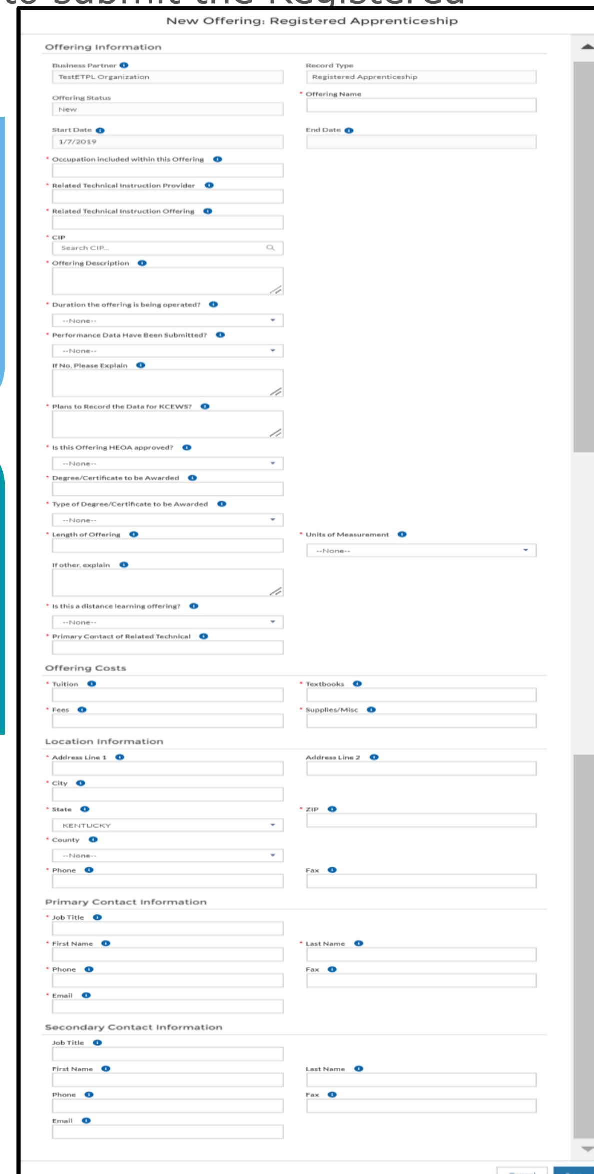
Subsections include Contact Information, Location Details, Costs, and Offering Information. Navigation to the performance and location tabs is available.

Registered Apprenticeship Summary

The Program Offering Summary screen provides the Business Partner with a summary list of all the Business Partners Program Offerings. A business Partner can create a new Offering, as well as managing previously created Program Offerings.

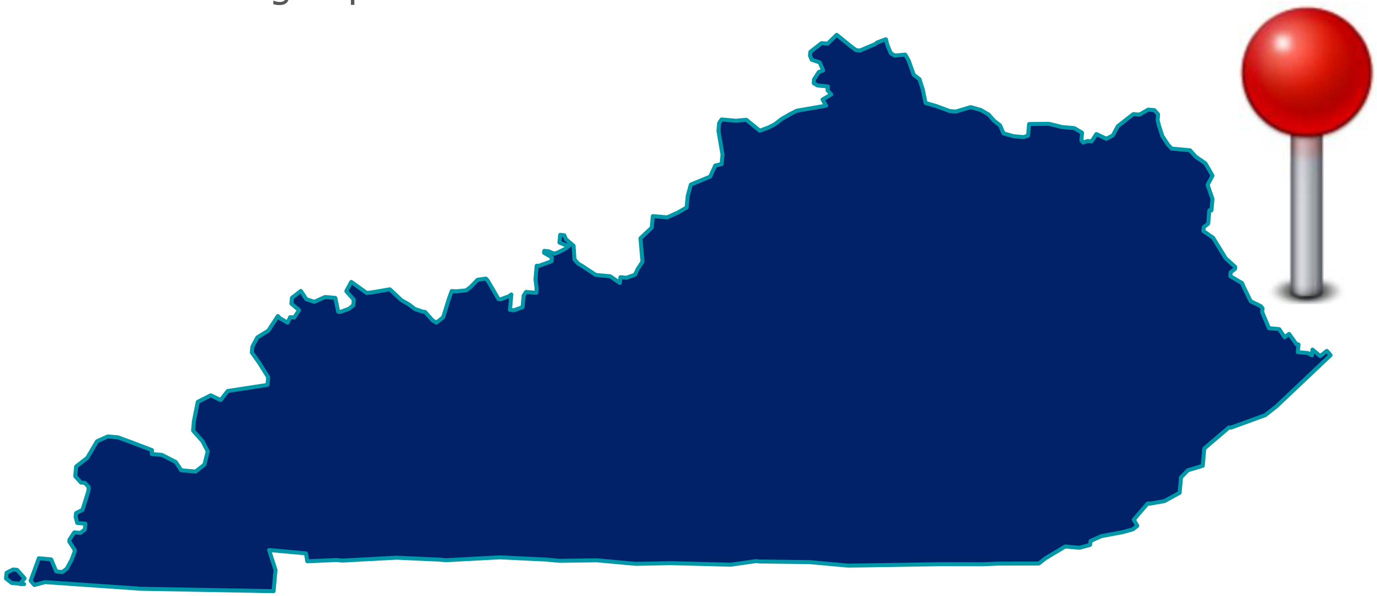
Edit Registered Apprenticeship

One navigates to this screen by clicking on the hyperlink to the specific on the “View Registered Apprenticeship Detail” screen. A change request will be submitted.



Location Summary

This details screen provides the Business Connect User with a list from google maps of all locations where the offering is provided.



Location Details

New
The User is able to add a New Offering Location through the Location Details Screen

View
The User is able to view a list of locations with details for a Program Offering

Edit
The User is able to edit all fields that are entered when creating a New Offering Location

Delete
The User has the ability to delete any Offering Location by using he drop-down arrow

Offering Performance Metrics

In order to have an offering approved, the business partner must upload the offering's student profile master data set to KY Stats. The performance metrics are as follows:

Year

Displays the Program Year for the Performance Goals.

Completion Rate

Displays the percentage of participants who completed and met all conditions for completion of the program.

Employed in 2nd Quarter After Exit Rate

Displays the percentage of participants who are in unsubsidized employment during the second quarter after exit from the program. For title I Youth, the indicator is the percentage of participants in education or training activities, or in unsubsidized employment during the second quarter after exit.

Employed in 4th Quarter After Exit Rate

Displays the percentage of participants who are in unsubsidized employment during the fourth quarter after exit from the program For title I Youth, the indicator is the percentage of participants in education or training activities, or in unsubsidized employment during the fourth quarter after exit.

Median Earnings in 2nd Quarter After Exit

Displays the median earnings of participants who are in unsubsidized employment during the second quarter after exit from the program.

Credential Attainment Rate

Displays the percentage of those participants enrolled in an education or training program who attain a recognized postsecondary credential or a secondary school diploma, or its recognized equivalent, during participation in or within one year after exit from the program.

Review My Ratings

Ratings are given by citizens who have previously worked with the Training Provider. On this screen, locations for offerings are also given. There are three fields that the latest 10 offerings will have details on:

Offering Name:

The offering name will be provided for the citizen to navigate to the offering and enroll

Location of Offering:

The location of the offering will provide the citizen with the physical location to attend if needed

Rating of Offering:

The rating of the offering is provided for future offering attendees to view from previous attendees point of view

System Demonstration

Module Six Knowledge Check

Knowledge checks are used to test your knowledge of the skills.

Knowledge Check #6

1. **The Ratings feature provided citizens with which of the following functionalities?**
   A. Offering Name
   B. Offering Location
   C. Previous Ratings
   D. All the above

2. **Offering categories include:**
   A. ITA Training
   B. Registered Apprenticeship
   C. Work Experience
   D. Both A & B

3. **Offerings may have a status of which of the following in the Business Connect system?**
   A. Pending Recertification
   B. Approved
   C. New
   D. All the above

Module Six Knowledge Check

Knowledge checks are used to test your knowledge of the skills.

Knowledge Check #6

1. **The Ratings feature provided citizens with which of the following functionalities?**
    - A. Offering Name
    - B. Offering Location
    - C. Previous Ratings
    - **D. All the above**

2. **Offering categories include:**
    - A. ITA Training
    - B. Registered Apprenticeship
    - C. Work Experience
    - **D. Both A & B**

3. **Offerings may have a status of which of the following in the Business Connect system?**
    - A. Pending Recertification
    - B. Approved
    - C. New
    - **D. All the above**

Module Seven

Opportunity Management

Module Seven Lesson Objectives

In the seventh module of this training guide, we discuss:

Module Seven: Opportunity Management

- ❖ Review the Opportunity lifecycle and effectively walkthrough creating a New Opportunity in Business Connect
- ❖ Understand how to Add/View/Edit Opportunity and Time Slots for each Opportunity

Module Seven Summary

The Opportunity Management module demonstrates how a User can create, manage, and search for opportunities within system.

Opportunity Management Overview

Through Business Connect, organizations may create opportunities to be published on Citizen Connect for citizens to directly enroll or on Staff Connect for case managers to enroll citizens.

Organizations have the ability to create, manage, and search opportunities.

Citizens do not have to be enrolled in a benefit program in order to be enrolled in an opportunity. Citizens can enroll in opportunities through Staff Connect or Citizen Connect. Opportunities may be created through Staff Connect by staff or through Business Connect by organizations.

Opportunities are community service events, work-related experiences, and other engaging activities posted by Business Partners in Business Connect. Opportunities can be reoccurring or single day.

Single Day Opportunities:
A user can mark an opportunity as **"single day"** on the Location & Date section of opportunity creation.

Recurring Opportunities

Single Day Opportunities

Recurring Opportunities:
A user can mark an opportunity as **"recurring"** on the Location & Date section of opportunity creation.

Create an Opportunity

Admin and contacts may create opportunities in Business Connect and post opportunities in Staff Connect and Citizen Connect.

In order to add an opportunity, time slot, and registration, a contact or admin must do the following:

Navigate to the "Administration" tab in Business Connect

Click on "Chapters" to view a list of all chapters in the system for the organization

Click on a specific chapter name's hyperlink

Navigate to the chapter's "Contacts & Opportunities" tab to view all contacts and opportunities for that chapter

Scroll downward to the "Opportunities" section of the screen

Click "New" under the "Opportunities" section of the screen to add a new opportunity

Fill out the opportunity details, location, date, and volunteer details and click "Save"

After saving the opportunity and navigating to the opportunity details screen, navigate to the "Manage Time Slots" field

On the "Manage Time Slots" screen, click "New" to add a new time slot

Enter all details into the timeslot and click "Save"

After adding time slots, navigate to the "Registrations" tab on the opportunity details screen

Click "New Registration" to begin registering a citizen into the opportunity

Enter all details, including the specific time slot, on the new registration screen and click "Save"

After adding the opportunity, time slots, and opportunity registrations, contacts and admin may edit or cancel the opportunities. After a citizen attends the opportunity, they may verify the citizen's attendance via "Registration" tab. Additionally, by publishing the opportunity, the opportunity is viewable in Staff Connect and Citizen Connect.

Opportunities in Citizen Connect

After adding the opportunity, time slots, and opportunity registrations, contacts and admin may publish the opportunity to make it viewable in Staff Connect and Citizen Connect.

Citizens enroll in opportunities to gain workforce training, education or working experience to move forward with a career path or to help obtain hours towards their individual requirements.

1. By clicking the **"Volunteer Opportunities Near You"** link the citizen will be taken to the *All Opportunities* screen to search for opportunities.
2. A citizens enrolled opportunities can be found in the *My Registered Volunteer Opportunities* section of the *Dashboard*.

Module Seven Knowledge Check

Knowledge checks are used to test your knowledge of the skills.

Knowledge Check #7

1. **Opportunities can be either recurring or single day.**
   A. True
   B. False

2. **Where can opportunities be created?**
   A. Business Connect
   B. Staff Connect
   C. Citizen Connect
   D. Both A and B

3. **Where can citizens directly enroll in opportunities?**
   A. Business Connect
   B. Staff Connect
   C. Citizen Connect
   D. All the Above

Module Seven Knowledge Check

Knowledge checks are used to test your knowledge of the skills.

Knowledge Check #7

1. **Opportunities can be either recurring or single day.**
   - **A. True**
   - B. False

2. **Where can opportunities be created?**
   - A. Business Connect
   - B. Staff Connect
   - C. Citizen Connect
   - **D. Both A and B**

3. **Where can a citizen be enrolled directly in an opportunity?**
   - A. Business Connect
   - B. Staff Connect
   - C. Citizen Connect
   - **D. All the Above**

Thank you!