

Managing Assigned Staff in a Stipend Track

Roles that Have Access: Funder Admin, Stipend Manager, Stipend Approver *with certain restrictions*

The Stipend Track page features many functionalities to streamline the stipend workflow. This instruction sheet will show you how to update a staff's status of a stipend, create staff accounts/reset passwords, email staff right from the grid, download staff mailing labels, download staff progress, and remove staff from the stipend.

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Navigating to Assigned Staff

Once you have assigned staff to a stipend track, there are many features included in the “Assigned Staff Stipends” grid that allows you to manage a staff’s stipend and communicate with the staff member.

Within a stipend track, you will notice many buttons at the top of the “Assigned Staff Stipends” tab. Each of these functions will be reviewed in this instruction sheet, as well as how to remove a staff member from a stipend track.

Child Development Teacher Permit Stipend Track

Home / Maple County / Child Development Teacher Permit Stipend Track

[← Back to Stipend Track Grid](#)

[Edit Stipend Track](#) [Copy Stipend Track](#) [Delete Stipend Track](#)

Stipend Amount: \$110.00 - \$300.00 **Budget:** \$2,500,000.00 **Start Date:** 7/1/2020 **End Date:** 6/30/2021

Budget Category/Cost Code: 1100-Pathways2021

[> Stipend Instructions](#)

Stipend Requirements [Add / Modify](#)

A. Initial Stipend Program Meeting with Your Professional Growth Advisor

B. **Optional** requirements: **(\$10.00 - \$150.00)**

- CLASS Overview | \$50.00
- ASQ: SE | \$50.00
- All About ECERS | \$10.00 per hour completed not to exceed \$50.00

C. Associates | \$50.00

D. **Optional** requirements: - Upload permit to the stipend if applicable **(\$50.00)**

- ECE Teacher Permit Stipend Application Forms | \$50.00

Assigned Staff Stipends **Stipend Progress**

[Assign Staff to Stipend Track](#) [Assign Stipend Approver](#) [Create Accounts](#) [Email Staff](#) [Update Status](#) [Download Filtered Staff Mailing Labels](#)



Assigned Staff Stipends **Stipend Progress**

[Assign Staff to Stipend Track](#) [Assign Stipend Approver](#) [Create Accounts](#) [Email Staff](#) [Update Status](#) [Download Filtered Staff Mailing Labels](#)

Note: The first two buttons in the grid (“Assign Staff to Stipend Track” and “Assign Stipend Approver”) have to do with setting up a stipend track and are accordingly explained in the instruction sheet titled, [“Setting Up a Stipend Track.”](#)

Updating the Status of a Stipend

The “Status” column shows the current status for those involved in the program. There are eight staff status types: “Available,” “Applied,” “Application Pending,” “Denied,” “Waitlisted,” “Accepted,” “Approved,” and “Paid.” The default status that appears next to assigned staff is “Available”; however, this can be toggled between “Available”, and “Applied” through the edit feature of the stipend track described below.

The Funder Admin, Stipend Manager, and Stipend Approver roles can all update the status of a stipend for the participating staff.

1

From the “Assigned Staff Stipends” grid, the Funder Admin, Stipend Manager, and Stipend Approver roles can toggle the status of each staff member’s stipend participation. To do so, select all the staff members whose status you’d like to update, and then click the blue “Update Status” button at the top of the grid.

Assign Staff to Stipend Track Assign Stipend Approver Create Accounts Email **2 Update Status** Download Filtered Staff Mailing Labels

Status: - Select - Agency: - Select - Site: - Select -

Highest Approved Permit: - Select - Role: Any Stipend Approver: - Select -

Apply filters Reset

Search: Show 10 entries Filters (1 applied) Excel Showing 1 to 7 of 7 entries **2 rows selected**

Stipend Track	Staff ID	Name	Agency	Sites	Stipend Approver	Status	Completed Requirements	Total Earned	Notes
<input checked="" type="checkbox"/>	View Stipend HR9055341	Selina Martinez	Applebank USD	Central State Preschool, Riverbank CDC	Jared Wolf	Approved	0 out of 5	\$0.00	(0)
<input type="checkbox"/>	View Stipend HR1327014503	Mittie Lin	Applebank USD	Allen State Preschool	Jared Wolf	Accepted	2 out of 5	\$0.00	(0)
<input checked="" type="checkbox"/>	View Stipend HR1974133618598	Melanie Preezo	Allred Child Development		Jeffrey Rodriguez	Approved	0 out of 5	\$0.00	(0)

2

A modal will appear. Choose the status of the staff member's participation and the applicable date. Click "Save."

Update Stipend Status

Status: Approved ▼

Applied On: 01/25/2021 📅

Cancel Save

Approver	Requirements
Central State Preschool, Riverbank CDC	Jared Wolf ▼ Approved 0 out of 5
Allen State Preschool	Jared Wolf ▼ Accepted 2 out of 5

3

The status of the stipend will be updated for each staff member you selected, which you can see in the "Status" column in the grid.

Search: Show 10 entries Filters (1 applied) Excel Showing 1 to 8 of 8 entries

<input type="checkbox"/>	Stipend Track	Staff ID	Name	Agency	Sites	Status	Completed Requirements	Total Earned	Notes	Account	Hig App Per
<input type="checkbox"/>	View Stipend	HR9055341	Selina Martinez	Applebank USD	Riverbank CDC	Approved	0 out of 2	\$0.00	(0)	LeadTeacher Reset Password	Teach
<input type="checkbox"/>	View Stipend	HR1327014503	Mittie Lin	Applebank USD	Allen State Preschool	Applied	0 out of 2	\$0.00	(0)	MittieLin Reset Password	Site Supe
<input type="checkbox"/>	View Stipend	HR1974133618598	Melanie Preezo	Allred Child Development Center		Approved	0 out of 2	\$0.00	(0)		
<input type="checkbox"/>	View Stipend	HR20425778	Kendra Santos	Applebank USD	Allen State Preschool	Approved	0 out of 2	\$0.00	(0)	KendraSantos Reset Password	Teach

Creating Staff Accounts & Resetting Staff Passwords

The Stipend Management feature within iPinwheel is designed to allow county administrators to easily manage staff participation and progress in a stipend program. In order to do so, the staff member must have an iPinwheel account. We have included the ability to create staff accounts and update log-in information right from the “Assigned Staff Stipends” grid. Funder Admins, Stipend Managers, and Stipend Approvers can all create staff accounts and reset passwords. Please follow the directions below to create and/or update staff account details.

1

You will notice if a staff member assigned to a stipend does not have an iPinwheel account if their “Account” field is empty in the grid. For example, in the grid below Natalie Fields does not have a staff account yet.

Assigned Staff Stipends

Stipend Progress

Assign Staff to Stipend Track Assign Stipend Approver Create Accounts Email Staff Update Status Download Filtered Staff Mailing Labels

Status: - Select - Agency: - Select - Site: - Select - Highest Degree: - Select -

Highest Approved Permit: - Select - Role: Any Stipend Approver: - Select -

Apply filters Reset

Search: Show 10 entries Filters (1 applied) Excel Showing 1 to 8 of 8 entries

Stipend Track	Staff ID	Name	Agency	Sites	Stipend Approver	Status	Completed Requirements	Total Earned	Notes	Account	Highest Approved Permit	Highest Approved Degree	Roles
<input type="checkbox"/> View Stipend	HR15258650	Natalie Fields	Applebank USD	Riverbank CDC	[Assign]	Available	0 out of 5	\$0.00	(0)				Instructional Assistant
<input type="checkbox"/> View Stipend	HR18487741	AnaMaria Lopez	Applebank USD	Forrest Avenue Head Start	[Assign]	Available	1 out of 5	\$40.00	(0)	AnaLopez2 Reset Password		Bachelors	Site Admin
<input type="checkbox"/> View Stipend	HR10104071	Emili Wong	Applebank USD	Allen State Preschool	[Assign]	Available	0 out of 5	\$0.00	(0)	Emili.Wong Reset Password	Teacher	Bachelors	Session Admin, Lead Teacher, Site Viewer

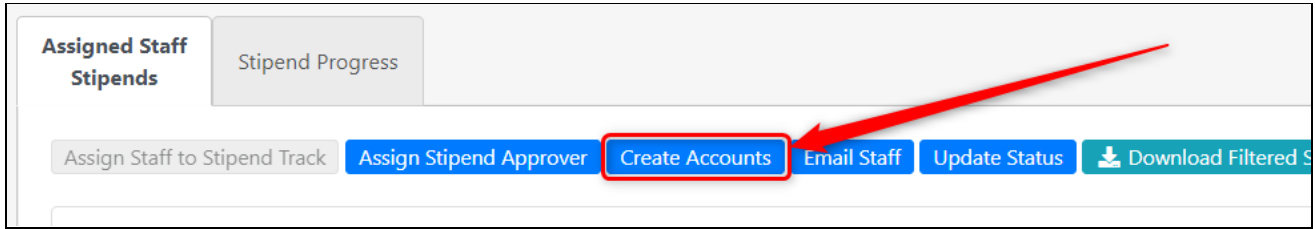
2

To create an account for the staff member, select their row in the grid in the leftmost column.

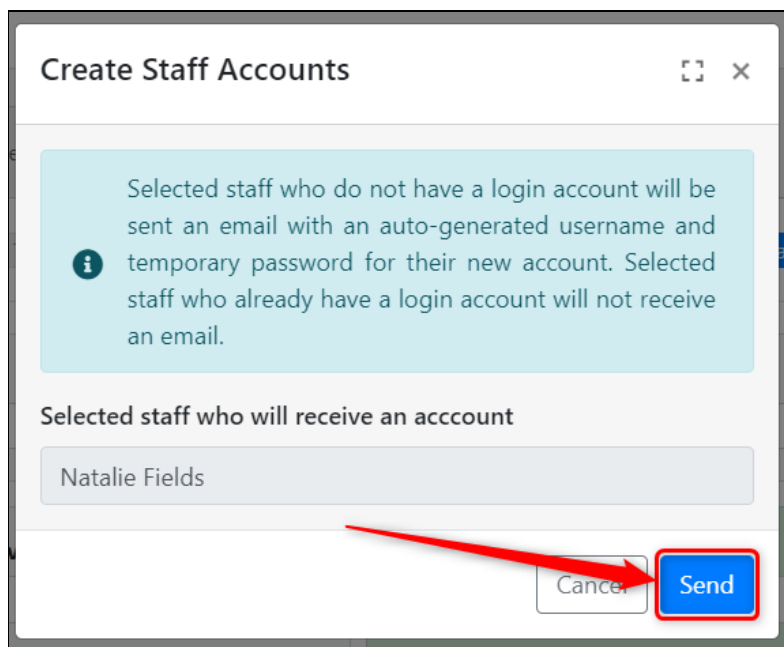
Search: Show 10 entries Filters (1 applied) Excel Showing 1 to 8 of 8 entries 1 row selected

Stipend Track	Staff ID	Name	Agency	Sites	Stipend Approver	Status	Completed Requirements	Total Earned	Notes	Account
<input checked="" type="checkbox"/> View Stipend	HR15258650	Natalie Fields	Applebank USD	Riverbank CDC	[Assign]	Available	0 out of 5	\$0.00	(0)	
<input type="checkbox"/> View Stipend	HR18487741	AnaMaria Lopez	Applebank USD	Forrest Avenue Head Start	[Assign]	Available	1 out of 5	\$40.00	(0)	AnaLopez2 Reset Password

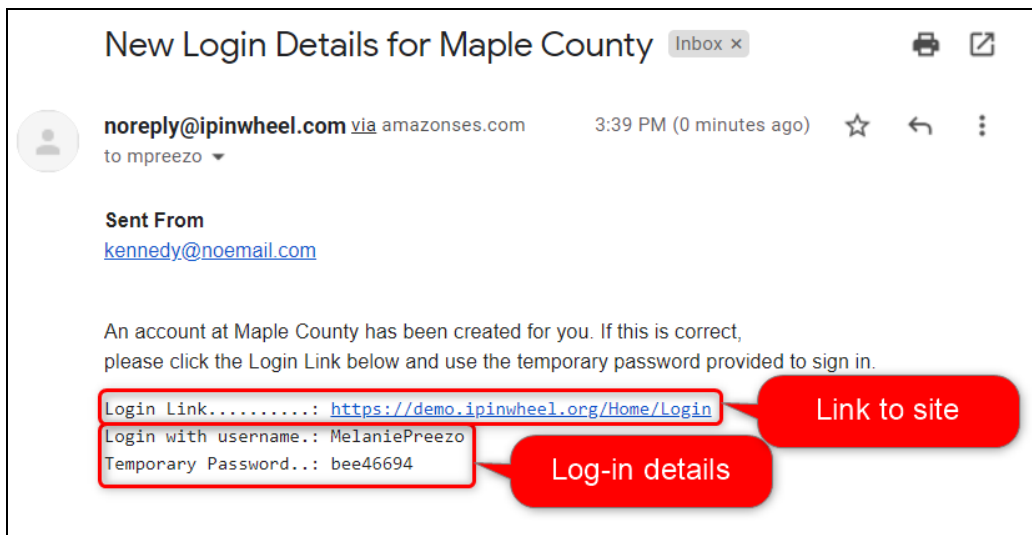
3 Then, click the blue “Create Accounts” button.



4 A modal will appear that shows the staff member(s) for which you are creating an account. Click “Send” and they will be sent an email with log-in information and a link to the log-in page. The username and password will be automatically generated by iPinwheel. Once they sign in, they will have access to their staff account.



The email sent will look like the image below.



5

In the grid, you will then see account details in the “Account” column for that staff member.

Search:

Show

10

 entries

Filters (1 applied)

Excel

Showing 1 to 8 of 8 entries

Stipend Track	Staff ID	Name	Agency	Sites	Stipend Approver	Status	Completed Requirements	Total Earned	Notes	Account	Highest Approved Permit	Highest Approved Degree
<input type="checkbox"/>	View Stipend	HR15258650	Natalie Fields	Applebank USD	Riverbank CDC	<div>Assign</div>	Available	0 out of 5	\$0.00	<div>(0)</div>	NatalieFields <div>Reset Password</div>	
<input type="checkbox"/>	View Stipend	HR18487741	AnaMaria Lopez	Applebank USD	Forrest Avenue Head Start	<div>Assign</div>	Available	1 out of 5	\$40.00	<div>(0)</div>	AnaLopez2 <div>Reset Password</div>	Bachelors

6

If you would like to reset a staff member’s password to their account, click “Reset Password” in the “Account” column.

Total Earned	Notes	Account	Highest Approved Permit
\$0.00	(0)	MelaniePreezo Reset Password	

7

Enter the new password and then again in the “Confirm Password” field. iPinwheel will automatically generate a random password which you will see in the password fields. You can choose to keep or override this password. We recommend you keep the “Email changes to staff” checked so the staff member will be sent an email with their new password to their staff account. Then click “Save.”

Reset Password

mpreezo@noemail.com

The changes made below will be sent to the staff's personal email address. If they do not have a personal email address, it will be sent to their work email address.

New Password

bird50660

Confirm Password

bird50660

☒ Email changes to staff

We recommend you keep this selected

Cancel Save

Emailing Staff from the Stipend Grid

The “Email Staff” feature allows you to communicate with the stipend participants right from the stipend track. You may want to email participants to welcome them to the stipend track, remind a participant to complete requirements by a certain date, or bring any issues about submitted material to a participant’s attention. Funder Admins, Stipend Managers, and Stipend Approvers can all email staff from the “Assigned Staff Stipends” grid. Please follow the directions below to send an email.

1

The “Assigned Staff Stipends” tab features an “Email Staff” functionality that allows you to send a personal email or email blast to assigned staff regarding the stipend program. To do so, first select all the staff members to whom you wish to send an email in the leftmost column. Then click the blue “Email Staff” button.

The screenshot shows the 'Assigned Staff Stipends' tab in a web application. A red circle with the number '1' highlights the selection checkboxes in the leftmost column of the table. A red circle with the number '2' highlights the 'Email Staff' button in the top navigation bar. The table contains three rows of staff data.

Stipend Track	Staff ID	Name	Agency	Sites	Stipend Approver	Status	Completed Requirements	Total Earn
<input checked="" type="checkbox"/> View Stipend	HR15258650	Natalie Fields	Applebank USD	Riverbank CDC	Jared Wolf ▾	Available	0 out of 5	\$0.00
<input checked="" type="checkbox"/> View Stipend	HR18487741	AnaMaria Lopez	Applebank USD	Forrest Avenue Head Start	[Assign] ▾	Available	1 out of 5	\$40.00
<input type="checkbox"/> View Stipend	HR10104071	Emili Wong	Applebank USD	Allen State Preschool	[Assign] ▾	Available	0 out of 5	\$0.00

2

In the modal that appears, you will notice the email addresses of the selected staff populated in the “Recipients” field. You have the option of adding more email addresses here, or clicking the “Copy Emails” button to copy the emails and send the message in your own email account as another option.

The screenshot shows the 'Send Email' modal. A red callout bubble points to the 'Copy Emails' button, with the text 'Click to copy all email addresses to your clipboard'. The 'Recipients' field contains three email addresses: ewong@me.com, kendrasantos@me.com, and mittie.lin@gmail.com. A red box highlights the recipients field.

Send Email

Sender: Kennedy Palmer

Recipients: ewong@me.com, kendrasantos@me.com, mittie.lin@gmail.com

Click to copy all email addresses to your clipboard

Copy Emails

Recipients are emailed individually and do not see each other's addresses

3

Then enter the subject and body of the email. If applicable, add attachments at the bottom. When you are done, click “Send.”

Send Email

Sender

Kennedy Palmer

Recipients

Copy Emails

ewong@me.com

kendrasantos@me.com

mittie.lin@gmail.com

Recipients are emailed individually and do not see each other's addresses

Subject

Pathways to Quality Stipend

Body

Hello Staff!

We are excited to have you on board the Pathway to Quality Stipend. Please feel free to reach out with any

Attachments

Choose Files

No attachments selected

Cancel

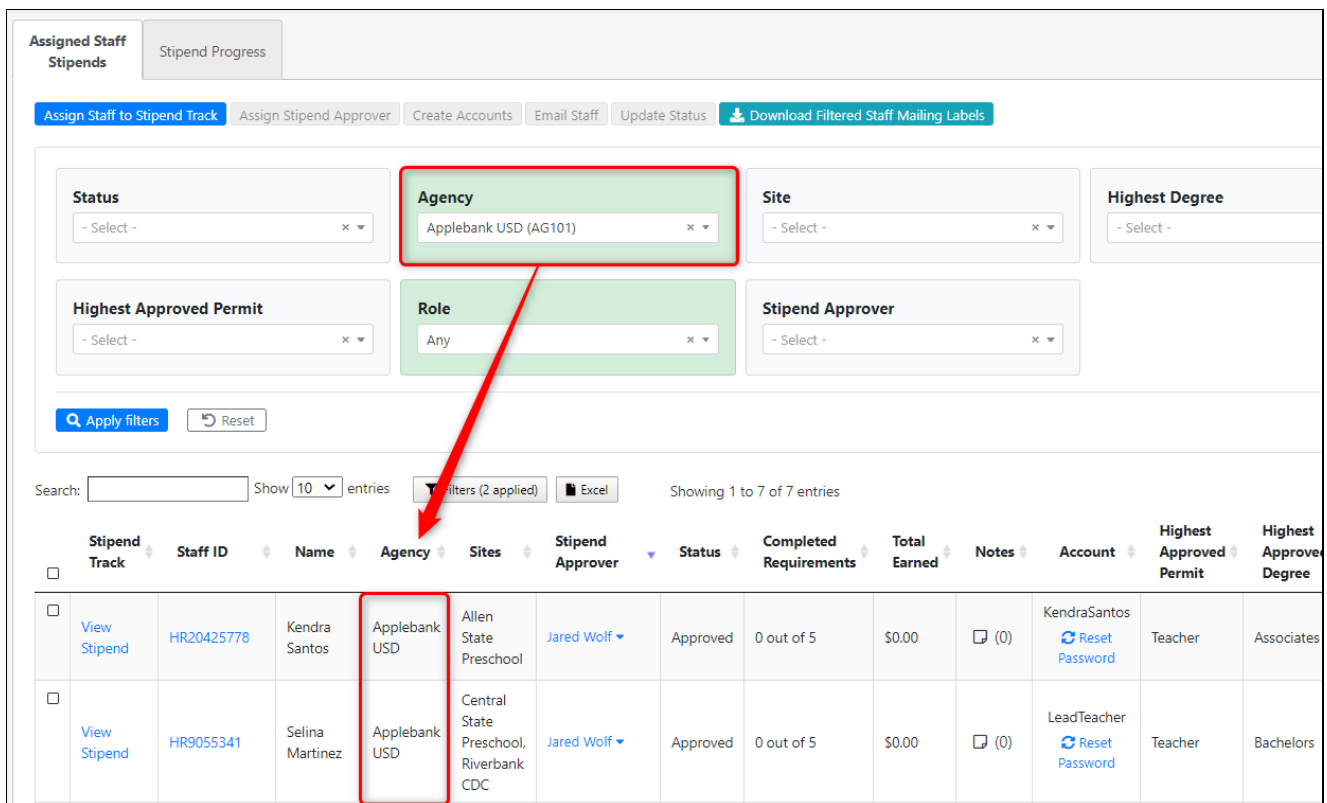
Send

Downloading Filtered Staff Mailing Labels

The Staff Mailing Labels feature allows you to download and access the mailing labels for any staff in a stipend, which can be useful for sending stipend compensation. Any filters that you apply to the grid will influence the download to only include the staff displayed in the grid, such as all staff that work at Applebank USD agency as seen in the example below. The Funder Admin, Stipend Manager, and Stipend Approver roles can all download staff mailing labels.

1

To download a list of the staff mailing addresses, you can first use the filters to display only certain staff in the grid. For example, we filtered for only staff from the Applebank USD agency.

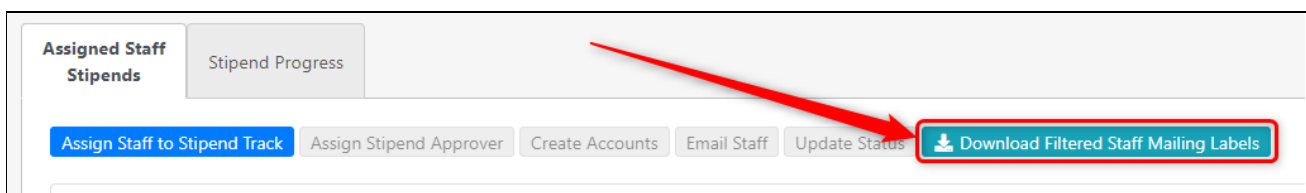


The screenshot shows the 'Assigned Staff Stipends' interface. At the top, there are tabs for 'Assigned Staff Stipends' and 'Stipend Progress'. Below the tabs are several action buttons: 'Assign Staff to Stipend Track', 'Assign Stipend Approver', 'Create Accounts', 'Email Staff', 'Update Status', and 'Download Filtered Staff Mailing Labels'. The 'Download Filtered Staff Mailing Labels' button is highlighted with a red box. Below the buttons are filter sections for 'Status', 'Agency', 'Site', 'Highest Degree', 'Highest Approved Permit', 'Role', and 'Stipend Approver'. The 'Agency' filter is set to 'Applebank USD (AG101)' and is highlighted with a red box. Below the filters are 'Apply filters' and 'Reset' buttons. A search bar and a 'Show 10 entries' dropdown are also present. The main table displays a list of staff members. The 'Agency' column is highlighted with a red box, and the 'Download Filtered Staff Mailing Labels' button is highlighted with a red box. A red arrow points from the 'Agency' filter to the 'Agency' column in the table.

Stipend Track	Staff ID	Name	Agency	Sites	Stipend Approver	Status	Completed Requirements	Total Earned	Notes	Account	Highest Approved Permit	Highest Approved Degree	
<input type="checkbox"/>	View Stipend	HR20425778	Kendra Santos	Applebank USD	Allen State Preschool	Jared Wolf	Approved	0 out of 5	\$0.00	<input type="checkbox"/> (0)	KendraSantos	Teacher	Associates
<input type="checkbox"/>	View Stipend	HR9055341	Selina Martinez	Applebank USD	Central State Preschool, Riverbank CDC	Jared Wolf	Approved	0 out of 5	\$0.00	<input type="checkbox"/> (0)	LeadTeacher	Teacher	Bachelors

2

Then click the “Download Filtered Staff Mailing Labels” button at the top of the tab. Your download will include only the mailing addresses for the staff members who are from the Applebank USD agency in this example. Apply all the filters you desire to display certain staff participants and then click to download.

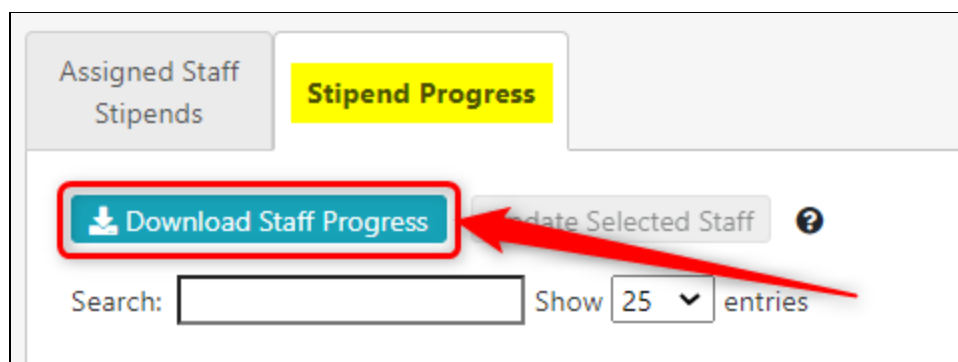


The screenshot shows the 'Assigned Staff Stipends' interface. At the top, there are tabs for 'Assigned Staff Stipends' and 'Stipend Progress'. Below the tabs are several action buttons: 'Assign Staff to Stipend Track', 'Assign Stipend Approver', 'Create Accounts', 'Email Staff', 'Update Status', and 'Download Filtered Staff Mailing Labels'. The 'Download Filtered Staff Mailing Labels' button is highlighted with a red box. A red arrow points from the 'Download Filtered Staff Mailing Labels' button to the 'Download Filtered Staff Mailing Labels' button.

Downloading Staff Progress

The “Stipend Progress” tab allows you to track each staff’s progress on the various requirements they are pursuing, as reviewed in the instruction sheet above. Additionally, you can download the grid in this tab at any point during the stipend. The download will reflect the staff member’s current status on the overall stipend, as well as for each requirement in the stipend that they are pursuing. The download will also include staff information, such as their staff ID, name, agency, and sites.

To download staff progress, click on the “Download Staff Progress” button at the top of the “Stipend Progress” tab.



The download will display staff information in the first columns, and then the staff’s progress on each requirement in the following columns.

	A	B	C	D	E
1	Staff ID	Staff Name	Agency	Sites	Stipend Status
2	HR15258650	Natalie Fields	Applebank USD	Riverbank CDC	Available
3	HR1327014503	Mittie Lin	Applebank USD	Allen State Preschool	Accepted
4	HR9055341	Selina Martinez	Applebank USD	Central State Preschool, Riverbank CDC	Approved
5	HR1974133618598	Melanie Preezo	Allred Child Development Center	Allen State Preschool	Approved
6	HR20425778	Kendra Santos	Applebank USD	Allen State Preschool	Approved
7	HR18487741	AnaMaria Lopez	Applebank USD	Forrest Avenue Head Start	Available
8	HR10104071	Emili Ally Wong	Applebank USD	Allen State Preschool	Available
9	HR13245306	Monica Rodriguez	Applebank USD	Riverbank CDC	Available



	F	G	H	I	J	K
1	Initial Stipend Program Meeting with Your Professional Growth Advisor	CLASS Overview	ASQ: SE	All About ECERS	Associates	ECE Teacher Permit Stipend App
2	In Progress	In Progress	In Progress	In Progress	In Progress	In Progress
3	Completed	In Progress	In Progress	Completed	In Progress	In Progress
4	In Progress	In Progress	In Progress	In Progress	In Progress	In Progress
5	In Progress	In Progress	In Progress	In Progress	In Progress	In Progress
6	In Progress	In Progress	In Progress	In Progress	In Progress	In Progress
7	In Progress	In Progress	In Progress	Completed	In Progress	In Progress
8	In Progress	In Progress	In Progress	In Progress	In Progress	In Progress
9	In Progress	In Progress	In Progress	In Progress	In Progress	In Progress

Removing Staff from the Stipend

In the event that you invited a staff member to a stipend track that you would like to remove/disinvite, you can do so from the staff's stipend record. The Funder Admin and Stipend Manager roles are the only roles that can remove a staff member from a stipend track.

1

To remove a staff member's access to a stipend, first click on "View Stipend" next to the "Staff ID" from whom you want to remove the availability of the stipend. This button is located in the "Assigned Staff Stipends" tab.

Search:

Show

10

 entries

Filters (2 applied)

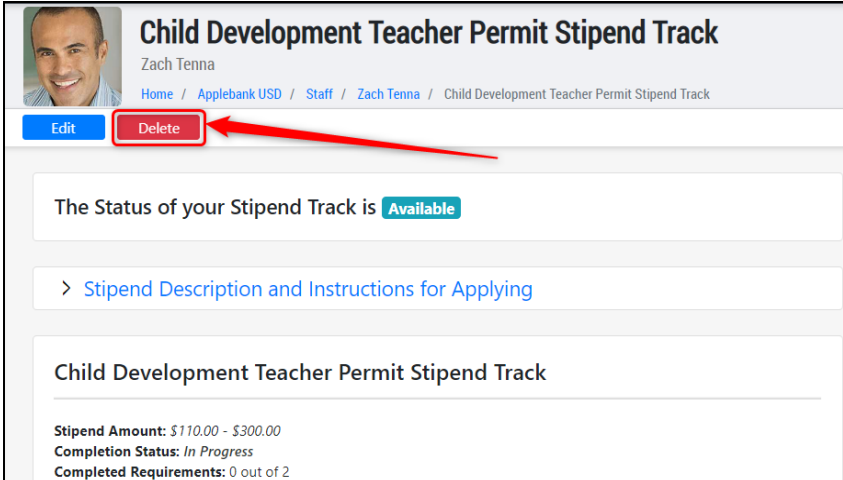
Excel


Showing 1 to 8 of 8 entries

<div><input type="checkbox"/></div>	<div>Stipend Track</div>	<div>Staff ID</div>	<div>Name</div>	<div>Agency</div>	<div>Sites</div>	<div>Status</div>	<div>Completed Requirements</div>	<div>Total Earned</div>	<div>Notes</div>
<div><input type="checkbox"/></div>	<div>View Stipend</div>	<div>HR10104071</div>	<div>Emili Wong</div>	<div>Applebank USD</div>	<div>Allen State Preschool</div>	<div>Available</div>	<div>0 out of 2</div>	<div>\$0.00</div>	<div><input type="checkbox"/></div>
<div><input type="checkbox"/></div>	<div>View Stipend</div>	<div>HR10233991</div>	<div>Zach Tenna</div>	<div>Applebank USD</div>	<div>Allen State Preschool, Riverbank CDC</div>	<div>Available</div>	<div>0 out of 2</div>	<div>\$0.00</div>	<div><input type="checkbox"/></div>
<div><input type="checkbox"/></div>	<div>View Stipend</div>	<div>HR13245306</div>	<div>Monica Rodriguez</div>	<div>Applebank USD</div>	<div>Riverbank CDC</div>	<div>Available</div>	<div>0 out of 2</div>	<div>\$0.00</div>	<div><input type="checkbox"/></div>

2

You will be redirected to that staff member's Stipend Track page. At the top of the page, under the staff member's profile picture, there is a red "Delete" button. Click this button to remove that staff member's access to the stipend. They will be removed from the grid within the "Assigned Staff Stipends" tab back on your main Stipend Track page.





Child Development Teacher Permit Stipend Track

Zach Tenna

[Home](#) / [Applebank USD](#) / [Staff](#) / [Zach Tenna](#) / Child Development Teacher Permit Stipend Track

[Edit](#) [Delete](#)

The Status of your Stipend Track is **Available**

> [Stipend Description and Instructions for Applying](#)

Child Development Teacher Permit Stipend Track

Stipend Amount: \$110.00 - \$300.00
Completion Status: *In Progress*
Completed Requirements: 0 out of 2