

Managing Stipends in the Staff Record

Roles that Have Access: Funder Admin, Stipend Manager, Stipend Approver, All ECE Roles (*with certain restrictions*)

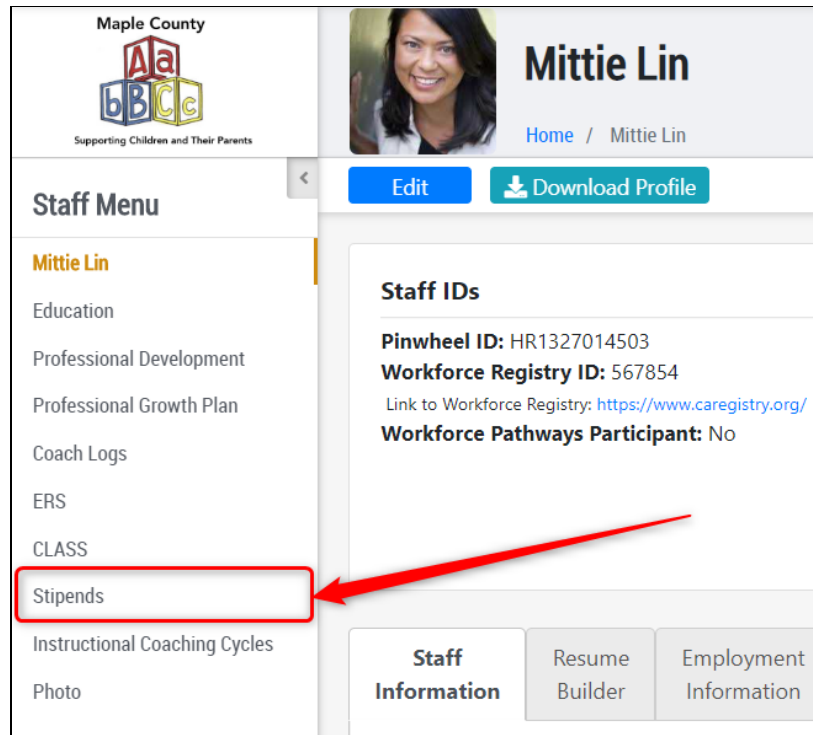
This instruction sheet explains how to use the iPinwheel Stipends feature from within the staff record. All the stipends that a staff member has been assigned will appear in their “Stipends” record where ECE staff can apply to and view details about the stipends they are participating in. This instruction sheet will also explain how county administrators with access to the stipend feature can manage the stipend’s progress and communicate with the ECE staff member all from within a stipend.

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Navigating to Stipends

- 1 To navigate to the stipends that a staff member has been assigned to or has completed, click on “Stipends” in the Staff Menu. If this menu item does not exist in the staff menu, then the staff member has not yet been assigned to a stipend track.



- 2 You will be led to the “Stipends” page where the staff member’s assigned stipends will be organized by “Stipends Available to Apply For,” “Your Active Stipends,” and “Your Completed Stipends.” Note that a card may not be displayed if they do not have a stipend in that respective category, such as a completed stipend.



Stipends

Mittie Lin

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Stipends Available to Apply For

| Action | Title | Amount Available | Dates Available |
|-----------------------|---|-----------------------|----------------------|
| Apply | Maple County Stipend BA Track (2020-2021) | \$100.00 - \$1,400.00 | 7/1/2020 - 6/30/2021 |

Your Active Stipends

| Title | Status | Date Applied | Earned To Date | Amount Available | Dates Available |
|---|----------|--------------|----------------|-------------------------|----------------------|
| Child Development Teacher Permit Stipend Track | Accepted | 11/18/2020 | \$50.00 | \$100.00 - \$150.00 | 7/1/2020 - 6/30/2021 |
| Pathway to Quality Stipend 20/21 Higher Education | Accepted | | \$0.00 | \$1,000.00 - \$2,000.00 | 11/1/2020 - 6/1/2021 |
| CA Workforce Pathways Stipend Track 2020-21 | Approved | 8/31/2020 | \$2,500.00 | \$1,350.00 - \$2,500.00 | 7/1/2020 - 7/1/2021 |

Your Completed Stipends

| Title | Status | End Date | Total Earned | Date Applied |
|--|-----------|-----------|--------------|--------------|
| Associate Degree to Transfer Track 2019-2020 | Available | 6/30/2020 | \$0.00 | |
| BA Degree Track 2019-2020 | Available | 6/30/2020 | \$0.00 | |
| Assistant Teacher ECE Permit 2019-2020 | Available | 6/30/2020 | \$0.00 | |
| Quality Counts BA Degree Track | Available | 6/30/2019 | \$0.00 | |

Overview of the Stipends Record

A staff member's "Stipends" record displays all assigned stipends organized into three cards listed below. As mentioned above, you may not see all these cards depending on their stipend history.

1. Stipends Available to Apply For
2. Your Active Stipends
3. Your Completed Stipends

The first card titled "Stipends Available to Apply For" lists all stipends that the staff member has been assigned to but has not yet applied to. Each stipend listed will display the total amount that the staff member can receive from participating in the "Amount Available" column and the dates that they must complete the requirements within in the "Dates Available" column.

| Stipends Available to Apply For | | | |
|---------------------------------|----------------------|------------------|-----------------|
| Action | Title | Amount Available | Dates Available |
| Apply | Maple County Stipend | \$100.00 - | 7/1/2020 - |
| | BA Track (2020-2021) | \$1,400.00 | 6/30/2021 |

The "Your Active Stipends" card will list each stipend that the staff member has applied to and is in the process of completing or has already completed. The stipends will exist in this card until after the end date, in which case the stipend will move to the "Your Completed Stipends" card.


This card will display three additional columns regarding the status of the stipend, the date the staff member applied, and the amount the staff has earned to date from the stipend.

| Your Active Stipends | | | | | |
|---|----------|--------------|----------------|----------------------------|-------------------------|
| Title | Status | Date Applied | Earned To Date | Amount Available | Dates Available |
| Child Development Teacher Permit Stipend Track | Accepted | 11/18/2020 | \$50.00 | \$100.00 - \$150.00 | 7/1/2020 - 6/30/2021 |
| Pathway to Quality Stipend 20/21 Higher Education | Accepted | | \$0.00 | \$1,000.00 - \$2,000.00 | 11/1/2020 - 6/1/2021 |
| CA Workforce Pathways Stipend Track 2020-21 | Approved | 8/31/2020 | \$2,500.00 | \$1,350.00 - \$2,500.00 | 7/1/2020 - 7/1/2021 |

The third card titled “Your Completed Stipends” lists all the stipends that have ended, meaning the end date has passed. This card displays the status of the stipend, the date the stipend ended, the total amount earned by the staff member, and the date the staff member applied.

| Your Completed Stipends | | | | |
|--|-----------|-----------|--------------|--------------|
| Title | Status | End Date | Total Earned | Date Applied |
| Associate Degree to Transfer Track 2019-2020 | Available | 6/30/2020 | \$0.00 | |
| BA Degree Track 2019-2020 | Available | 6/30/2020 | \$0.00 | |
| Assistant Teacher ECE Permit 2019-2020 | Available | 6/30/2020 | \$0.00 | |
| Quality Counts BA Degree Track | Available | 6/30/2019 | \$0.00 | |

When the stipends exist in the “Stipends Available to Apply For” and “Your Active Stipends” cards, you can click on the stipend title to enter that staff’s stipend record.



Stipends

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Stipends Available to Apply For

| Action | Title | Amount Available | Dates Available |
|-----------------------|---|-----------------------|----------------------|
| Apply | Maple County Stipend BA Track (2020-2021) | \$100.00 - \$1,400.00 | 7/1/2020 - 6/30/2021 |

Your Active Stipends

| Title | Status | Date Applied | Earned To Date | Amount Available | Dates Available |
|---|----------|--------------|----------------|-------------------------|----------------------|
| Child Development Teacher Permit Stipend Track | Accepted | 11/18/2020 | \$50.00 | \$100.00 - \$150.00 | 7/1/2020 - 6/30/2021 |
| Pathway to Quality Stipend 20/21 Higher Education | Accepted | | \$0.00 | \$1,000.00 - \$2,000.00 | 11/1/2020 - 6/1/2021 |
| CA Workforce Pathways Stipend Track 2020-21 | Approved | 8/31/2020 | \$2,500.00 | \$1,350.00 - \$2,500.00 | 7/1/2020 - 7/1/2021 |





Child Development Teacher Permit Stipend Track

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Add Attachments/Notes

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

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

Child Development Teacher Permit Stipend Track

Stipend Amount: \$100.00 - \$150.00
Completion Status: *In Progress*
Completed Requirements: 1 out of 2
Applied On: 11/18/2020
Total Earned: \$50.00

Stipend Requirements

At the top of the stipend page, the status of the stipend for that staff member will be displayed. This status will be updated as it moves from “Available” to “Applied” and so forth. There are eight total statuses that a stipend can have: Available, Applied, Application Pending, Denied, Waitlisted, Accepted, Approved, and Paid.

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

To review more details about the stipend, click on the “Stipend Description and Instructions for Applying” section.

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



✓ Stipend Description and Instructions for Applying

The goal of this stipend track is to promote the Maple County ECE Workforce members to work towards attainment of a first-time ECE Teacher Permit. This stipend is only available for Lead Teachers who currently work in an infant, toddler, or preschool classroom and who already have a valid and current ECE Associate Teacher Permit. Follow the directions below to apply for this stipend track. We will mark the status of your stipend as "Approved" if you meet the participation requirements and complete the application. Once approved, all requirements for the stipend track will be visible inside of this record in iPinwheel.

Please follow these steps to apply for this stipend track:

Download and complete the stipend application located online at this link: www.mapleworkforcestipend.org

Upload the completed stipend application to this stipend feature inside iPinwheel.

Make sure the information for your Associate Teacher Permit has been inputted into iPinwheel in your "Staff Profile" in the "Education" menu item and a copy of your permit was attached as evidence to that education record.

Please note that all stipend requirements must be met/completed by March 1, 2021 to receive the stipend amount.

The next card below will display a staff member's details about the stipend, including their completion status, the number of requirements they have completed, the date they applied, and the total amount that they have earned.

Child Development Teacher Permit Stipend Track

Stipend Amount: \$100.00 - \$150.00

Completion Status: *In Progress*

Completed Requirements: 1 out of 2

Applied On: 11/18/2020


Total Earned: \$50.00

The "Stipend Requirements" section will display all the requirements within a stipend that the staff member is pursuing and the staff member's progress for each requirement. If the staff member has completed a requirement, the row will turn green and the total amount earned for that requirement will be displayed on the right side of the card.

Stipend Requirements

| Status | Completed | Total Earned |
|--|---|--------------------|
| Complete one of the following: (\$0.00 - \$50.00) | | |
| In Progress | CLASS Overview \$50.00 | or |
| In Progress | ASQ: SE \$50.00 | or |
| Completed | All About the ECERS \$10.00 per hour completed not to exceed \$50.00 | \$20.00 2.00 hours |
| In Progress | Associates \$50.00 | |
| Optional requirements: - Upload permit to the stipend if applicable (\$50.00) | | |
| In Progress | ECE Teacher Permit Stipend Application Forms \$50.00 | |
| Total | | \$50.00 |

To view more details about each requirement, click on the requirement's title that you wish to view. In this view-page, ECE Staff can only view more details. The Funder Admin role and the Stipend Manager role can edit/update the status of a requirement here, which you can learn more about in the [“Updating Stipend Requirement Progress”](#) section below.



Professional Development Stipend Requirement

Mittie Lin

[Home](#) / [Mittie Lin](#) / Professional Development Stipend Requirement

View Stipend

Click to go back to the stipend track

Stipend Requirement

Type:
Professional Development

Description:
Complete the workshop about the CLASS Assessment.

Status:
In Progress

Overridden:
No

Professional Development Type:
Workshop

Professional Development Title:
CLASS Overview

Professional Development To Be Completed After:
7/1/2022

The last section on a stipend track page is the “Notes and Attachments” card. All ECE Staff, Funder Admins, Stipend Managers, and Stipend Approvers can add notes and attachments here to communicate with each other about the stipend.

Note(s)

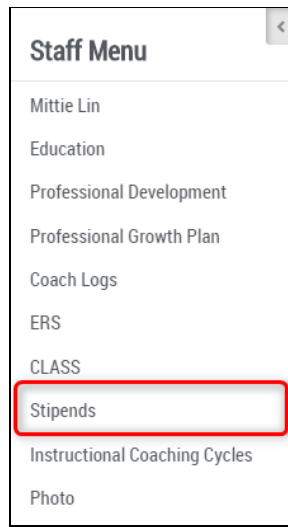
| Note | By | Date |
|---|-----------|------------|
| I dropped my class at Grossmont College and enrolled in Southwestern. | MittieLin | 11/19/2020 |

Attachment(s)

| File Name | File Extension | Type | Size | Date |
|--|----------------|---|----------|------------|
| Course Units Overview.docx | .docx | application/vnd.openxmlformats-officedocument.wordprocessingml.document | 11.58 KB | 11/19/2020 |

Applying to a Stipend

- 1 As an ECE Staff member, you can apply to a stipend by navigating to your “Stipends” record.



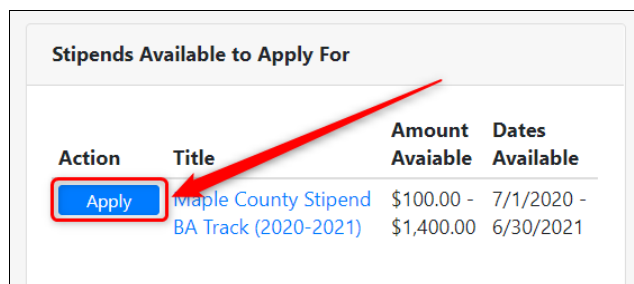
The 'Stipends' page for Mittie Lin. It features a header with her name and a breadcrumb trail: Home / Mittie Lin / Stipends. Below the header are three main sections: 'Stipends Available to Apply For', 'Your Active Stipends', and 'Your Completed Stipends'. The first section contains a table with two rows of stipend information and a blue 'Apply' button next to the first row.

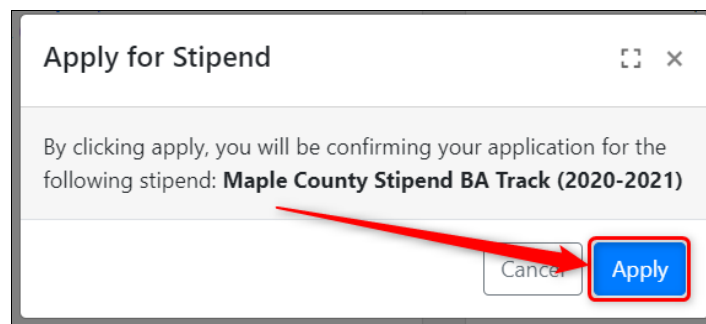
| Action | Title | Amount Available | Dates Available |
|-----------------------|----------------------|------------------|-----------------|
| Apply | Maple County Stipend | \$100.00 - | 7/1/2020 - |
| | BA Track (2020-2021) | \$1,400.00 | 6/30/2021 |

| Title | Status | Date Applied | Earned To Date | Amount Available | Dates Available |
|---|----------|--------------|----------------|-------------------------|----------------------|
| Child Development Teacher Permit Stipend Track | Accepted | 11/18/2020 | \$50.00 | \$100.00 - \$150.00 | 7/1/2020 - 6/30/2021 |
| Pathway to Quality Stipend 20/21 Higher Education | Accepted | | \$0.00 | \$1,000.00 - \$2,000.00 | 11/1/2020 - 6/1/2021 |
| CA Workforce Pathways Stipend Track 2020-21 | Approved | 8/31/2020 | \$2,500.00 | \$1,350.00 - \$2,500.00 | 7/1/2020 - 7/1/2021 |

| Title | Status | End Date | Total Earned | Date Applied |
|--|-----------|-----------|--------------|--------------|
| Associate Degree to Transfer Track 2019-2020 | Available | 6/30/2020 | \$0.00 | |
| BA Degree Track 2019-2020 | Available | 6/30/2020 | \$0.00 | |
| Assistant Teacher ECE Permit 2019-2020 | Available | 6/30/2020 | \$0.00 | |
| Quality Counts BA Degree Track | Available | 6/30/2019 | \$0.00 | |

- 2 On the “Stipends” page, find the stipend you wish to apply to in the “Stipends Available to Apply For” card. If you do not see the stipend you wish to apply to here, contact your county administrators. Click on the blue “Apply” button next to the appropriate stipend. In the modal that appears, click “Apply.”






If you wish to review the details of the stipend first, click the title of the stipend.

| Stipends Available to Apply For | | | |
|---------------------------------|---|-----------------------|----------------------|
| Action | Title | Amount Available | Dates Available |
| Apply | Maple County Stipend BA Track (2020-2021) | \$100.00 - \$1,400.00 | 7/1/2020 - 6/30/2021 |

Within the stipend track's page, you can click the blue "Apply to Stipend" button at the top of the page. This will change the status of the stipend at the top to "Applied" immediately.



Maple County Stipend BA Track (2020-2021)
Mittie Lin
[Home](#) / [Mittie Lin](#) / [Maple County Stipend BA Track \(2020-2021\)](#)

[Add Attachments/Notes](#) [Apply for Stipend](#)

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

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

Maple County Stipend BA Track (2020-2021)

Stipend Amount: \$100.00 - \$1,400.00
Completion Status: *In Progress*
Completed Requirements: 1 out of 4
Applied On: 9/4/2019
Total Earned: \$0.00

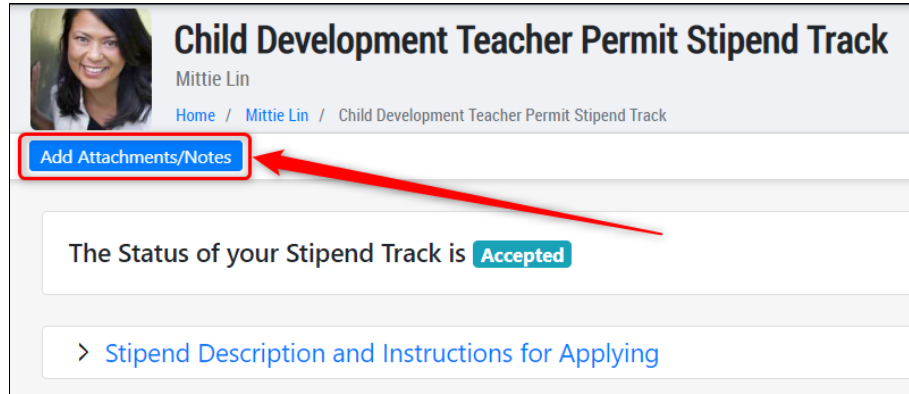
Stipend Requirements



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

Adding Notes/Attachments

- 1 Once within a stipend track's page, click on the blue "Add Attachments/Notes" button at the top of the page. All ECE Staff, Funder Admins, Stipend Managers, and Stipend Approvers have access to this feature. This will allow the ECE workforce and those managing the stipend track to easily communicate with one another.



- 2 To add a note, enter your message in the "Add Note" text box, then click the blue "Save Note" button. The note will then appear in the notes section. The "By" column will display the workforce member's account name.

Notes

Save Note

Add Note

I dropped my class at Grossmont College and enrolled in Southwestern.

1

2

Notes

Save Note

Add Note

| Note | By | Date |
|---|-----------|------------|
| I dropped my class at Grossmont College and enrolled in Southwestern. | MittieLin | 11/19/2020 |

The “Stipend Approver” will be able to see the note and can respond.

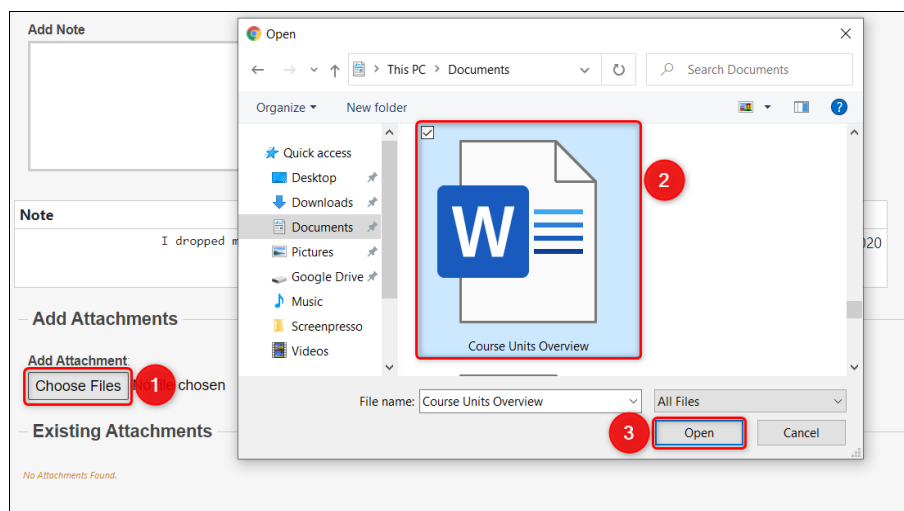
| Note(s) | | |
|---|-----------------|----------|
| Note | By | Date |
| That is fine as long as you complete the requirement before the deadline. | StipendApprover | 9/9/2019 |
| I dropped my class at Grossmont College and enrolled in Southwestern. | DonnaBaser | 9/9/2019 |

This feature allows the communication between the workforce, “Stipend Approver,” and “Stipend Manager” to be documented in one convient location inside of iPinwheel. If there is ever a situation that requires you to reference correspondence and directions given to the workforce member, you can look here.

The workforce member does not have the ability to delete notes, only the roles “Stipend Manager” and “FunderAdmin” can delete notes.

3 There is also the ability to add attachments. This is where applications, forms, and other documents would be uploaded and saved. Any kind of documents that are required should be attached here. Both the participating staff and stipend manager can add attachments making this feature a convenient way to manage documents for stipends.

To add attachments, first click the “Choose Files” button, then select the correct file, and then click “Open.” Your attachment will then appear under the “Existing Attachments” title.



| Add Attachments | | | | | |
|-----------------------------|----------------------------|----------------|---|----------|------------|
| Add Attachment: | | | | | |
| Choose Files No file chosen | | | | | |
| Existing Attachments | | | | | |
| Delete | File Name | File Extension | Type | Size | Date |
| <input type="checkbox"/> | Course Units Overview.docx | .docx | application/vnd.openxmlformats-officedocument.wordprocessingml.document | 11.58 KB | 11/19/2020 |

Updating Stipend Requirement Progress

The “Funder Admin” and “Stipend Manager” roles can update the progress of a requirement within a staff member’s stipend record. The ECE staff members do not have access to this feature.

To access more details and instructions for how to manage requirements within a stipend, please refer to the instruction sheet titled, “How to Use the Stipend Management Feature” found in the [Stipend Management help center](#). The section below will provide a brief overview of updating requirements within a staff record.

Marking Customized Requirements as Complete

1

A “Customized” stipend requirement will not be connected to any data entered into the iPinwheel data system, since it is used when the requirement does not fall under one of iPinwheel’s requirement categories (Education, Professional Development, and Professional Growth Plan). As such, these requirements must be marked “Completed” manually by the Funder Admin or Stipend Manager.

In the example below, the “Complete the W-9/590 Forms using your legal name” requirement is a “Customized” requirement, so it needs to be marked “Completed” manually. To do so, click on the title.

| Stipend Requirements | | |
|--|--|--------------|
| Status | Completed | Total Earned |
| Complete at least 1 of the following: (\$1,000.00 - \$2,000.00) | | |
| In Progress | Spring Higher Education Pathway Stipend - 3 Units \$1,000.00 or | |
| In Progress | Fall Higher Education Pathway Stipend - 3 Units \$1,000.00 | |
| Completed | Meet with Your Professional Growth Advisor | |
| Complete all of the following: | | |
| Completed | Complete the Invoice with your legal name and | |
| In Progress | Complete the W-9/590 Forms using your legal name and | |
| Completed | Complete a Pathway To Quality Application | |
| In Progress | Complete at least 1 of the following: | |
| Total | | \$0.00 |

2 Within the requirement's view page, click the blue "Edit" button at the top.

Customized Stipend Requirement
Mittie Lin
Home / Applebank USD / Staff / Mittie Lin / Customized Stipend Requirement

[View Stipend](#) [Edit](#)

Stipend Requirement

Type:
Customized

Description:
[Intentionally Left Blank]

Status:
In Progress

Updated By:
FunderAdmin

Updated Date:
11/17/2020

Created By:
FunderAdmin

Created Date:
11/17/2020

3 Check the "Mark Requirement as Complete" field, enter the date of completion, and then click "Save."

Customized Stipend Requirement
Mittie Lin

[Save](#) [Cancel](#)

Stipend Requirement

Type:
Customized

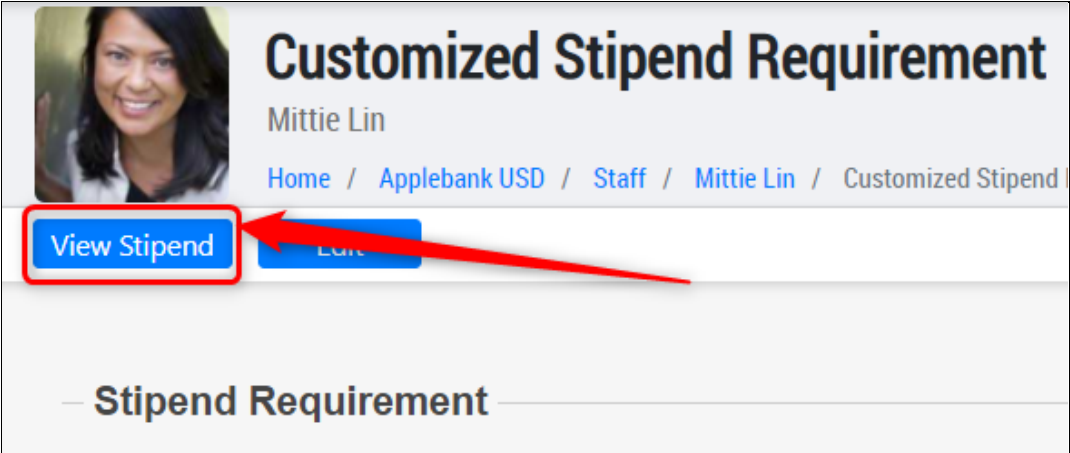
Description:
[Intentionally Left Blank]

Mark Requirement as Complete: ☒ 1

Requirement Completed On: 11/19/2020 2

4

Click the “View Stipend” button to go back to the stipend page. The requirement will now be green with a “Completed” status. If the requirement provides the staff member with payment, the total will appear in the “Total Earned” column.



Customized Stipend Requirement

Mittie Lin

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[View Stipend](#) [Edit](#)

Stipend Requirement



| Stipend Requirements | | |
|--|--|--------------|
| Status | Completed | Total Earned |
| Complete at least 1 of the following: (\$1,000.00 - \$2,000.00) | | |
| In Progress | Spring Higher Education Pathway Stipend - 3 Units \$1,000.00 or | |
| In Progress | Fall Higher Education Pathway Stipend - 3 Units \$1,000.00 | |
| Completed | Meet with Your Professional Growth Advisor | |
| Complete all of the following: | | |
| Completed | Complete the Invoice with your legal name and | |
| Completed | Complete the W-9/590 Forms using your legal name and | |
| Completed | Complete a Pathway To Quality Application | |
| In Progress | Complete at least 1 of the following: | |
| Total | | \$0.00 |

Overriding Requirements


The Requirements of a stipend program are set up to be integrated with the data within the iPinwheel system. For example, if a requirement is to attend and complete a workshop, once that workshop is entered and accepted in a staff member's "Professional Development" record, it will be automatically marked as "Complete" in the stipend for that staff member.

However, if this data is not entered into iPinwheel then the Funder Admin or Stipend Manager needs to "override the requirement" and manually mark it as complete. Please follow the steps below to override a requirement.

- 1 To override a requirement, first click into the requirement by selecting the title.

| Stipend Requirements | | | |
|--|--|--------------|---------------|
| Status | | Completed | Total Earned |
| Optional requirements: - Upload permit to the stipend if applicable (\$50.00) | | | |
| In Progress | ECE Teacher Permit Stipend Application Forms \$50.00 | | |
| In Progress | All About ECERS \$10.00 per hour completed not to exceed \$50.00 | | |
| In Progress | Associates \$50.00 | | |
| | | Total | \$0.00 |

- 2 Now within the requirement page, click the blue "Edit" button at the top of the page.



Professional Development Stipend Requirement
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[Home](#) / [Applebank USD](#) / [Staff](#) / [Mittie Lin](#) / Professional Development Stipend Requirement

[View Stipend](#) [Edit](#)

Stipend Requirement
Type:
Professional Development
Description:
Complete the workshop on Instructional Leadership to complete this Professional Development requirement.
Status:
In Progress
Overridden:
No
Professional Development Type:
Workshop
Professional Development Title:
All About ECERS
Professional Development To Be Completed After:
7/1/2020
Professional Development To Be Completed Before:
6/30/2021

3

Mark the “Yes” bubble under the “Stipend Requirement Override” section and enter the date the requirement was completed. Provide a reason for overriding the requirement if you would like to, then click “Save.”

Professional Development Stipend Requirement
Mittie Lin

Save Cancel

Stipend Requirement

Type:
Professional Development

Description:
Complete the workshop on Instructional Leadership to complete this Professional Development requirement.

Stipend Requirement Override:
☐ No ☒ Yes

Requirement Completed On:
 mm/dd/yyyy

November 2020

| Su | Mo | Tu | We | Th | Fr | Sa |
|----|----|----|----|----|----|----|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 | 1 | 2 | 3 | 4 | 5 |
| 6 | 7 | 8 | 9 | 10 | 11 | 12 |

Today

For Stipend Requirement Overrides, a date must be manually entered for when the requirement was completed

4

When a requirement is overridden, it will be shown in the completed column of the “Stipend Requirements” grid.

Stipend Requirements

This number updates when the "Stipend Approver" approves the status of the staff member's stipend participation

| | Completed | Total Earned |
|---|-------------------------------------|--------------|
| ✓ A. ECE Teacher Permit Stipend Application Forms \$50.00 | \$50.00 | |
| ✓ B. Complete one of the following: (\$10.00 - \$300.00) | | \$150.00 |
| <ul style="list-style-type: none"> ○ Commit to a Professional Growth Plan \$50.00 or ○ Instructional Leadership - PAS \$10.00 per hour completed not to exceed \$50.00 or ✓ ○ Associates \$50.00 or ✓ ○ Bachelors \$100.00 | \$50.00 \$100.00 override | |
| Total | | \$0.00 |