Configuring Stipend Programs

Roles that Have Access: Funder Admin, Stipend Coordinator

In order to utilize the new Hubbe Stipend Application Feature, it is essential to configure your stipend programs prior to launching. Stipend Programs act as "cohorts" for your stipend initiatives and allow you to completely customize your program and have multiple programs active concurrently. In this instruction sheet, we will cover how to configure your Stipend Programs, the first step to launching your stipend applications.

Table of Contents

Click on the topic or page number to jump to the corresponding section of the instruction sheet.

Navigating to Stipend Program Configuration.. 1

Creating a Stipend Program.. 2

Configuring a Stipend Program 5

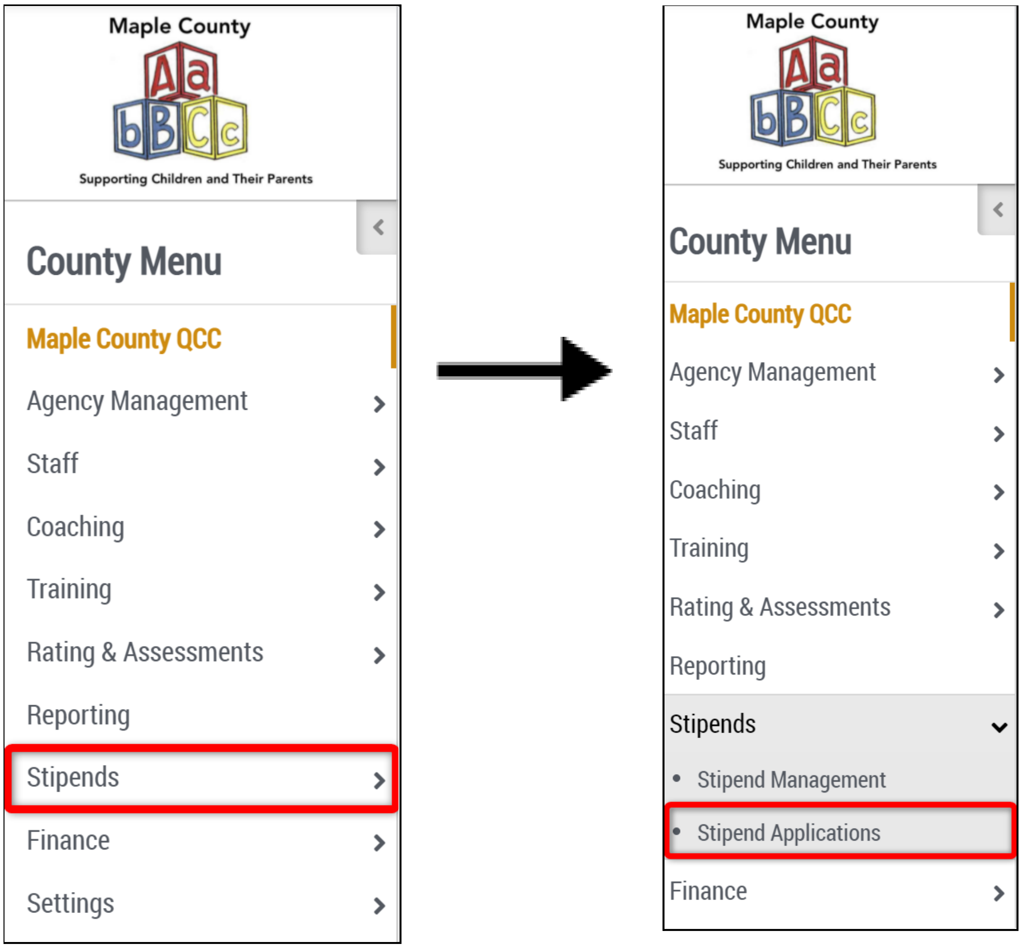
- Program Configuration.. 5
- Show/Hide Program Fields 8
- Program Custom Questions.. 10

Completing a Stipend Program.. 14

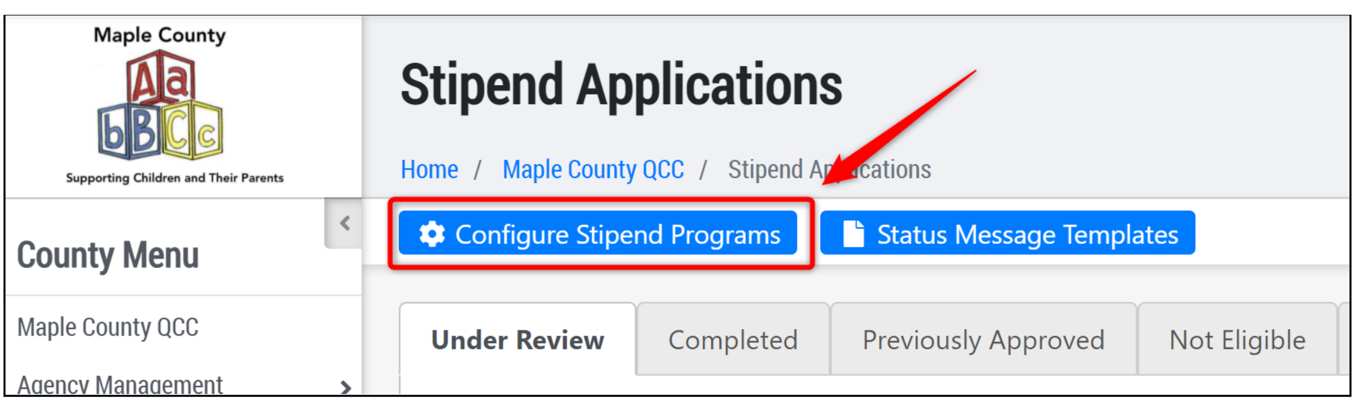
Sharing the Stipend Portal Login with the Workforce.. 16

Navigating to Stipend Program Configuration

In order to navigate to the Stipend Program Configuration area, we must first navigate to the Stipend Application area. From the County Landing page, click on “Stipends” and then “Stipend Applications”



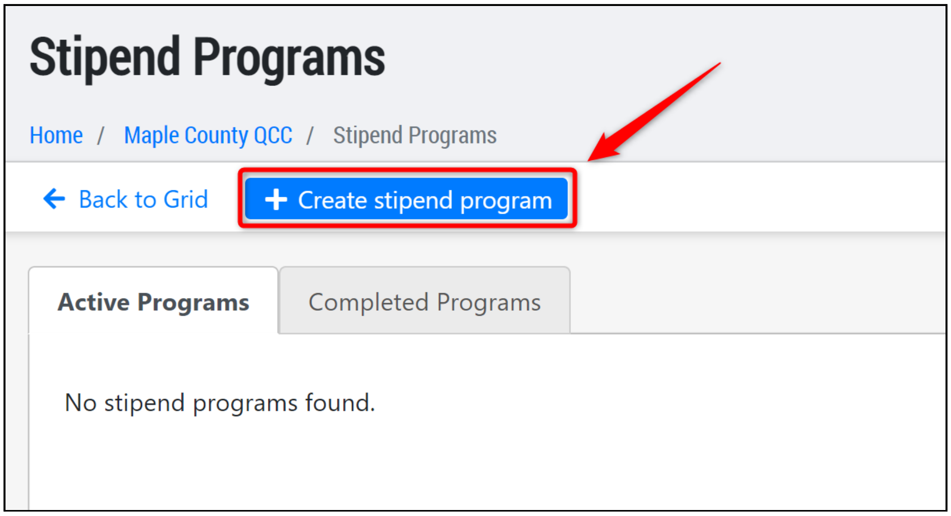
2 From here, click on the blue “Configure Stipend Programs” button at the very top of the page.



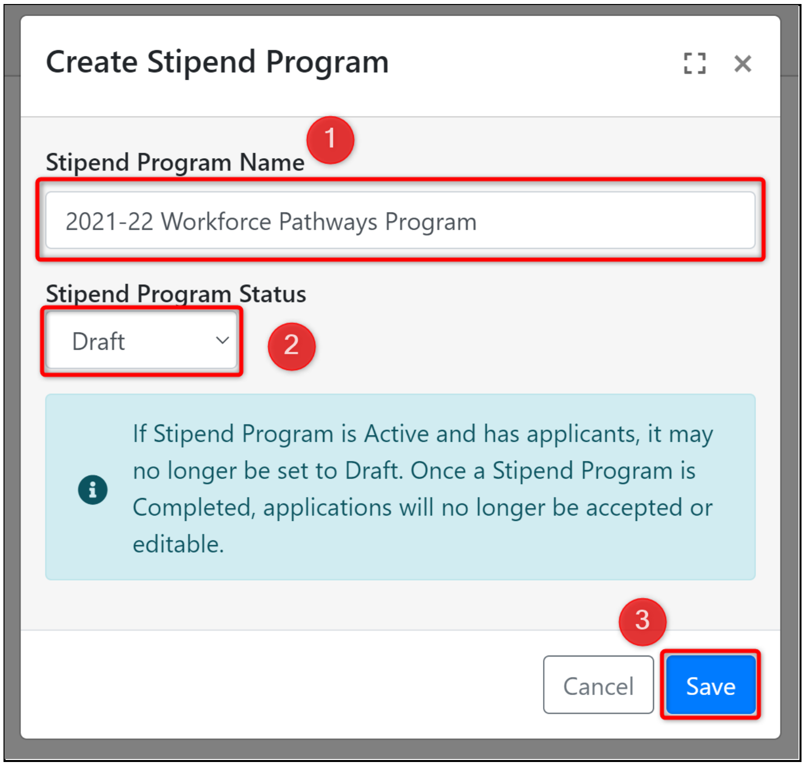
Creating a Stipend Program

Prior to launching your Stipend Application within Hubbe, you're going to want to "set up" your stipend application first. Note that stipend applications are housed in what are called "**Stipend Programs**". All customizations for a stipend application are done within a respective stipend program. The reason for this structure is to allow the user to have multiple Stipend Programs active at the same time, with completely different customizations for each one. Please note that prior to setting up a Stipend Program, it is advised to set up your stipend tracks first. For learning resources on creating and managing stipend tracks, please see our other resources here.

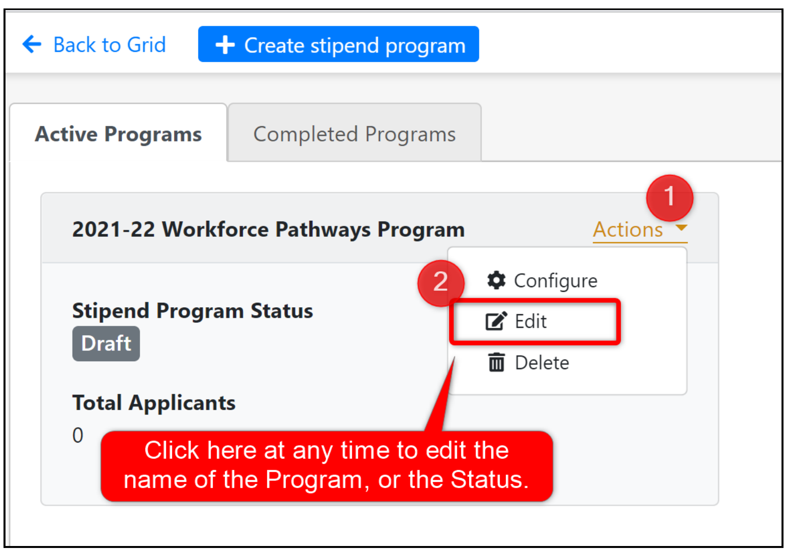
1 The page for the Stipend Program Configuration will be blank initially. This is because you have not created a Stipend Program Yet. In order to create one, click on the blue "Create Stipend Program" button at the top of the page.



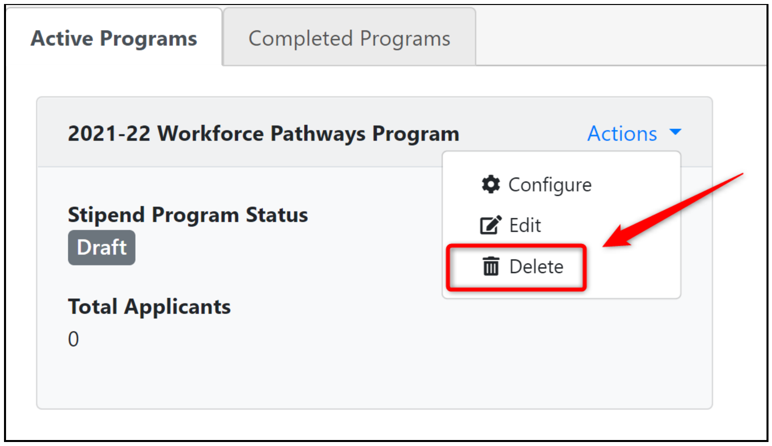
2 A modal will pop out for you, to "Create Stipend Program". From here, we have the option to edit 2 fields. The "Stipend Program Name" and then the "Stipend Program Status". For the Stipend Program Status we have 3 options: draft, active, and complete. We will opt to start this program as a draft, and then move it to "active" once we have everything setup and are ready for applicants.

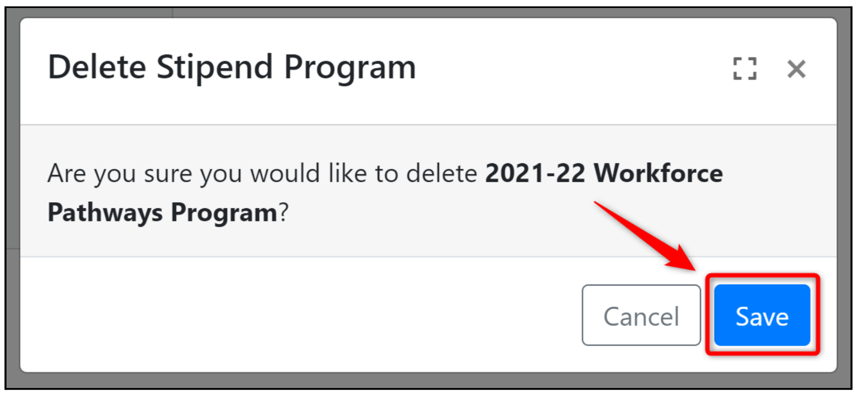


3 After clicking on the blue “Save” button, you will have successfully created your Stipend Program. We can see this on our page. Note that at any time, you have the ability to edit the Name of the Program as well as the status by clicking on the blue “Actions” text and then selecting “Edit” from the drop-down:

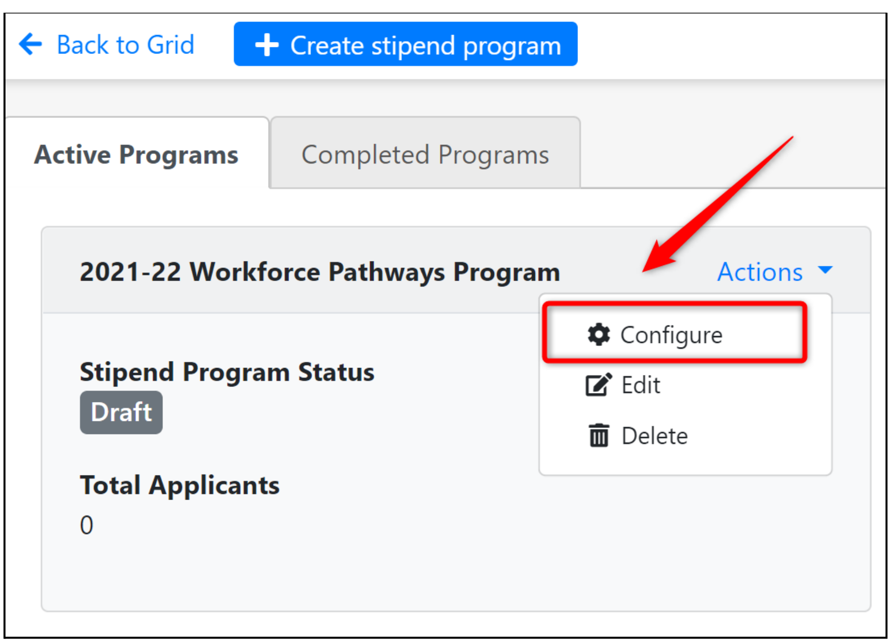


4 We can observe that we also have the ability to “Delete” a Stipend Program as well. If at any time you realize you don’t want to move forward with this Stipend Program, you can opt to delete it by clicking on the “Delete” option from the drop-down, and confirming by clicking on the blue “Save” button. **NOTE:** <u>this can only be done for Stipend Programs in the “Draft” State, once a program is “Active” and has at least 1 applicant it cannot be deleted, only moved to “Complete”</u>.





5 If we are certain that we are ready to move forward with this Stipend Program, we can click on the blue “Actions” text and then click “Configure” to begin setting up our Stipend Program.

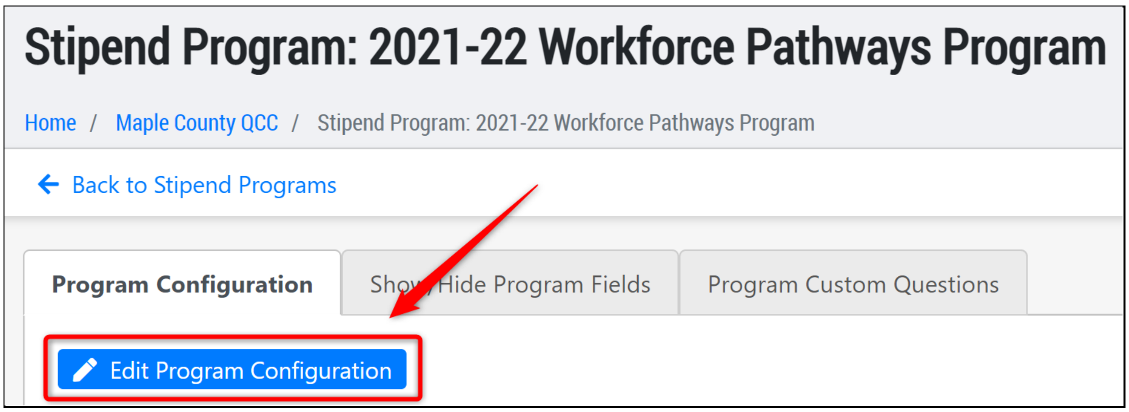


Configuring a Stipend Program

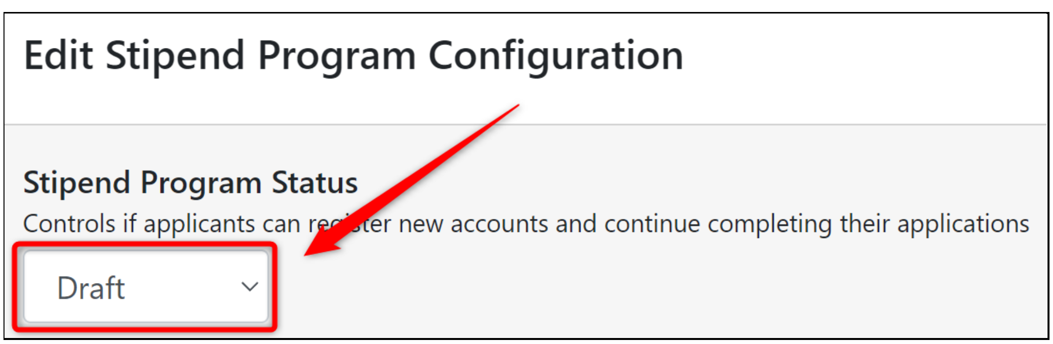
We are now ready to begin configuring our Stipend Program! In other words, we are free to start customizing the stipend application for this "cohort" of applicants. There are 3 tabs on this page all related to Stipend Program Configuration and we are going to walk through each one in this section.

Program Configuration

1 This first tab on this page is for "Program Configuration". There are several different options to manage in this section, but we will begin by clicking on the "Edit Program Configuration" button at the top of the page.

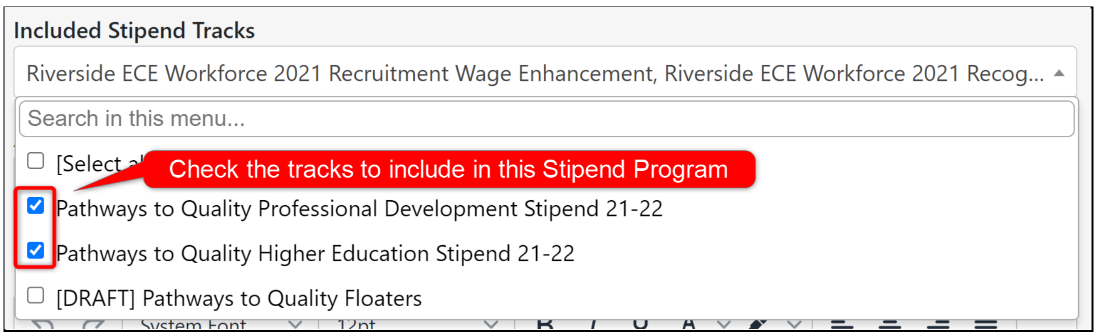


2 The "Edit Stipend Program Configuration" modal will pop up for us, and we can begin managing our preferences. The first is for "Stipend Program Status", which is what we have already managed in the previous section. We opted to leave it as a "Draft" for now, and will change it to "Active" when we are ready for applicants.

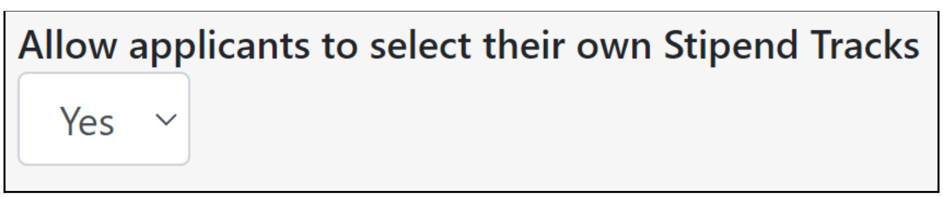


3 The next option is labeled "Require Existing Agency and Site Selection". This is a yes/no setting to automatically mark applications as ineligible when agency or site don't exist in the system. So this is up to you if you require applicants to be flagged as ineligible if they don't select an existing agency/site in the system. We will disable this for now in our example.

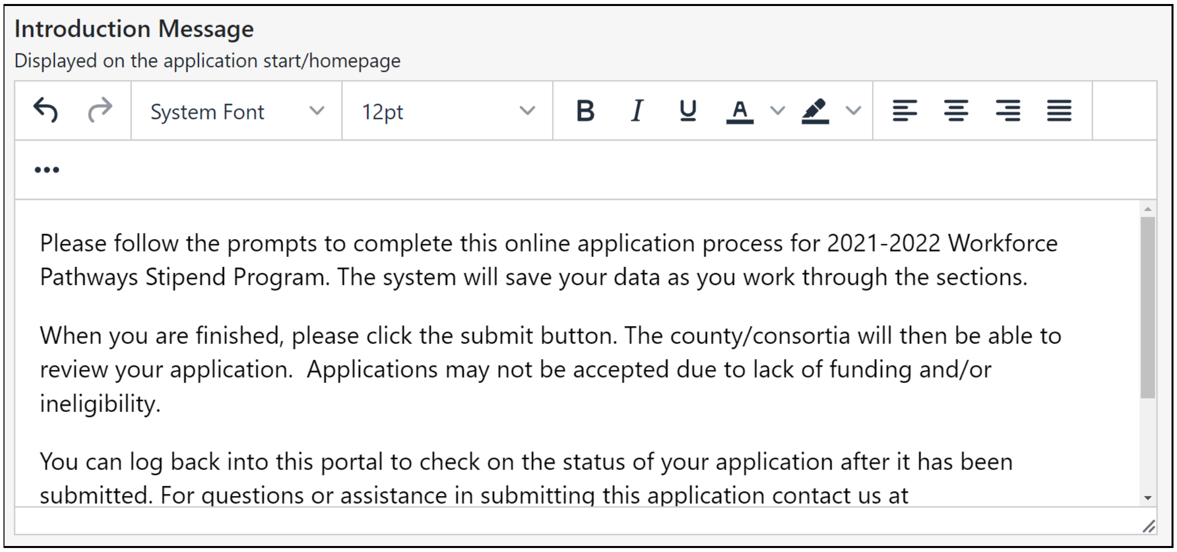
4 Next is the section for "Included Stipend Tracks". This section is very crucial for setting up your program correctly. In this section, you are selecting which tracks will be included within this Stipend Program. Meaning that if you opt to exclude a Stipend Track from this program, any applicants will be unable to apply to said track. Oftentimes, you will want to include all stipend tracks if you are only creating a single Stipend Program, but not necessarily.



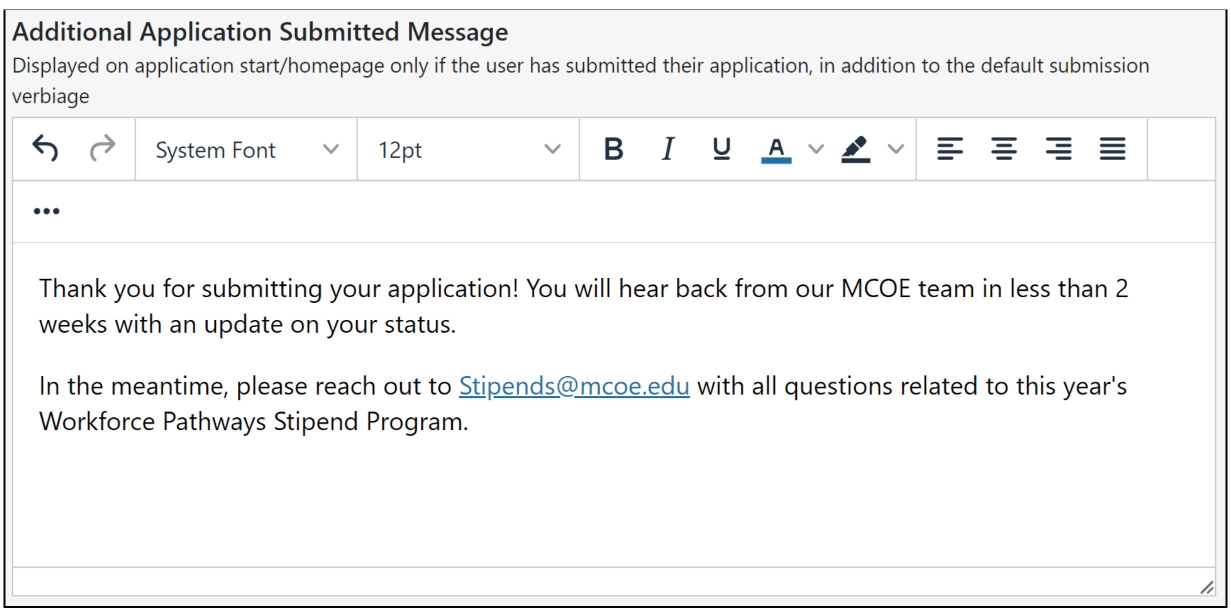
5 Next is the option to "Allow applicants to select their own Stipend Tracks". This is a Yes/No setting that determines if applicants are able to see the Stipend Tracks available, and express interest for them when applying. If this is something you want them to do when applying, then set this to "Yes".



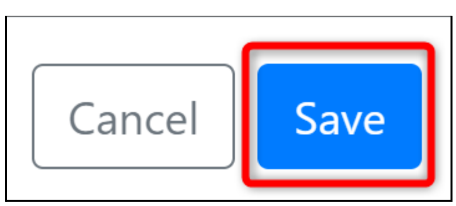
6 Next is the section for an "Introduction Message". Here, you can customize the message that applicants receive on the application start/homepage. As you see below, we have free reign over what to enter here. Feel free to type any relevant information for applicants here:



7 Underneath this, there are **four more** text sections for you to customize. They are the “Application Ineligible Message”, “Additional Application Submitted Message”, “Employer Selection (Agency/Site) Instructions”, and the “Instructions for Forms & Downloads”. All four of these sections function just like the one above, where the message that displays for the user is customizable by the admin. See below for another example of this:

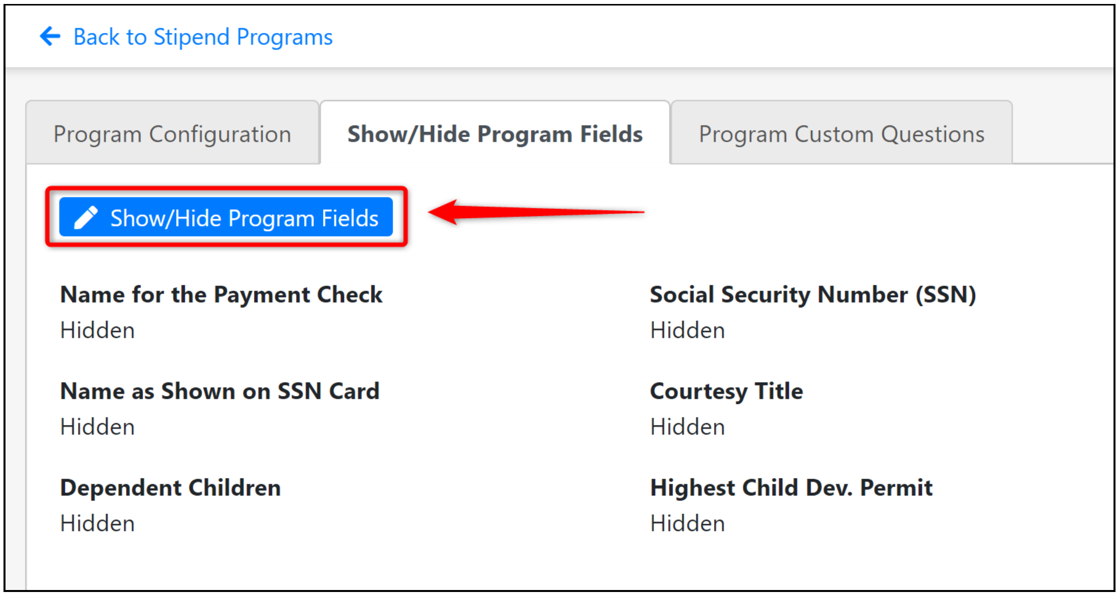


8 You can finalize all your settings by clicking on the blue “Save” button at the bottom of the modal.

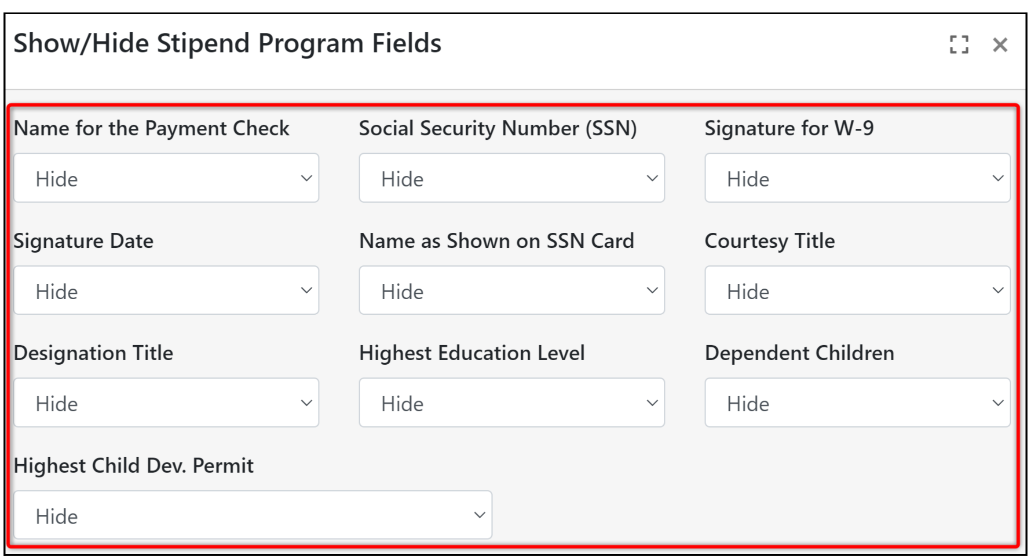


Show/Hide Program Fields

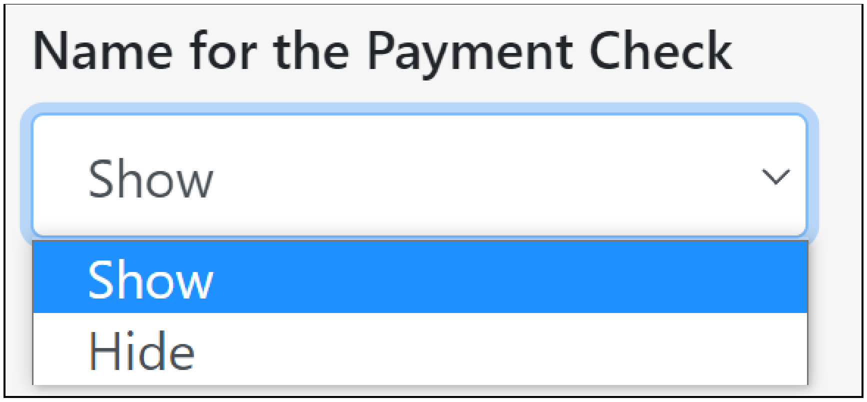
1 This second tab on this page is for “Show/Hide Program Fields”. This section is specifically for determining which set of fields appear on the application for this Stipend Program. You will see, there is much flexibility for what fields you want to collect in the application process. We can begin by clicking on the blue “Show/Hide Program Fields” button.



2 The “Show/Hide Stipend Program Fields” modal will pop up for us, and we can begin managing our preferences. There are 2 distinct sections here. The top section is for managing some individual fields that can be turned on/off for applicants in this program. We can see that there are 10 fields that we can opt to show/hide.

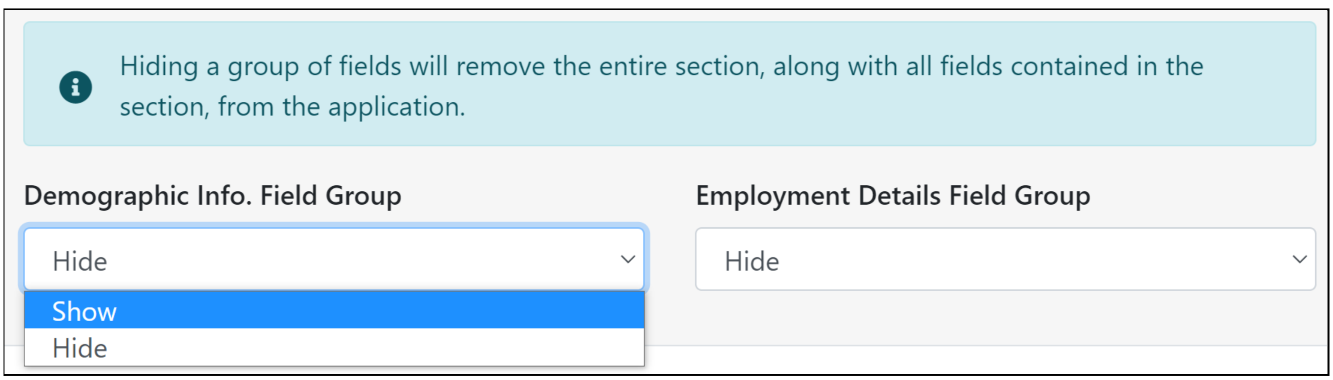


3 In order to show or hide these fields from our application. We can click on the drop-down next to the respective field we want to change, and click on “Show” or “Hide”. As we can see below:

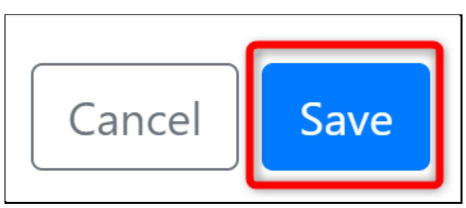


If we opt to “Hide” any of these fields, it will be removed from the application entirely for this Stipend Program.

4 The bottom half of the modal functions in a very similar way, but instead of single fields you are managing preferences for an entire Field Group. On the Stipend Application, there are some cards that contain several fields “grouped” together, and you can determine if you want to show or hide these. Hiding these groups will remove the entire section/card from the application.



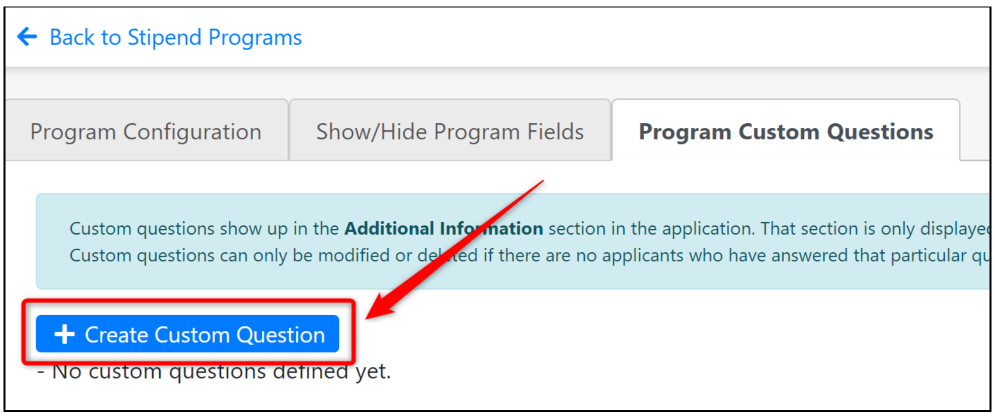
5 Once we are happy with the options that we have selected to show/hide, we can finalize our settings by clicking on the blue “Save” button at the bottom of the modal.



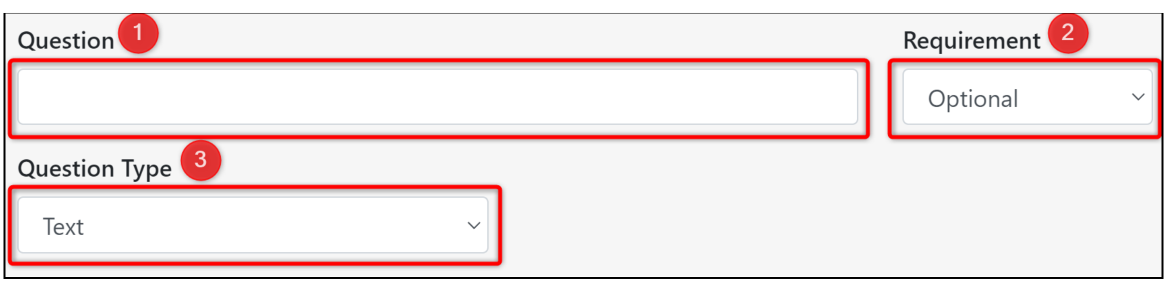
Program Custom Questions

1 This final tab on this page is for “Program Custom Questions”. This section is for configuring any additional questions that you want to ask the user prior to application. Any and all custom questions will appear in their own section labeled “Additional Information” at the bottom of the application if atleast one custom question is enabled. We hope that this section allows users to customize the application to meet their program-specific needs.

To get started, click on the blue button labeled “Create Custom Question”

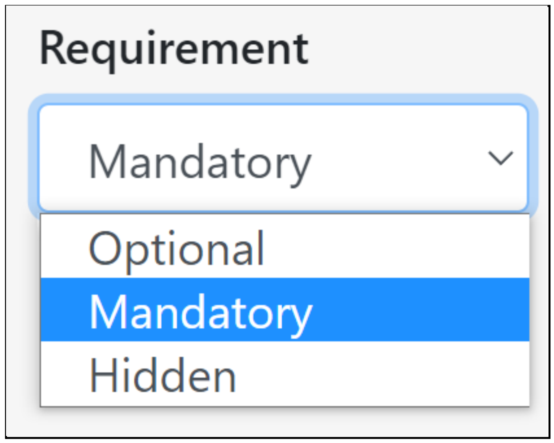


2 The “Create Custom Question” modal will pop up for us, and we can begin creating our custom question. Note, that questions will be created one by one. Additionally, it is important to know that in addition to being able to customize the question itself, you can also choose if the question is optional/mandatory/hidden as well as the “Question Type”.



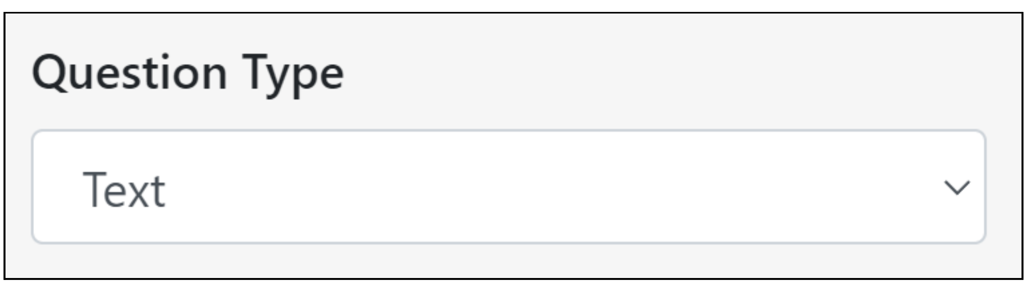
3 First, we can create our question. We can type anything that we want for this. For our example, we will simply ask “Why do you want to Participate in the 2021-22 Workforce Pathways Program?”.

4 Next, we will select if we want this question to be optional/mandatory/hidden. Since we want a response from all applicants, we will opt to set this question as “Mandatory”.

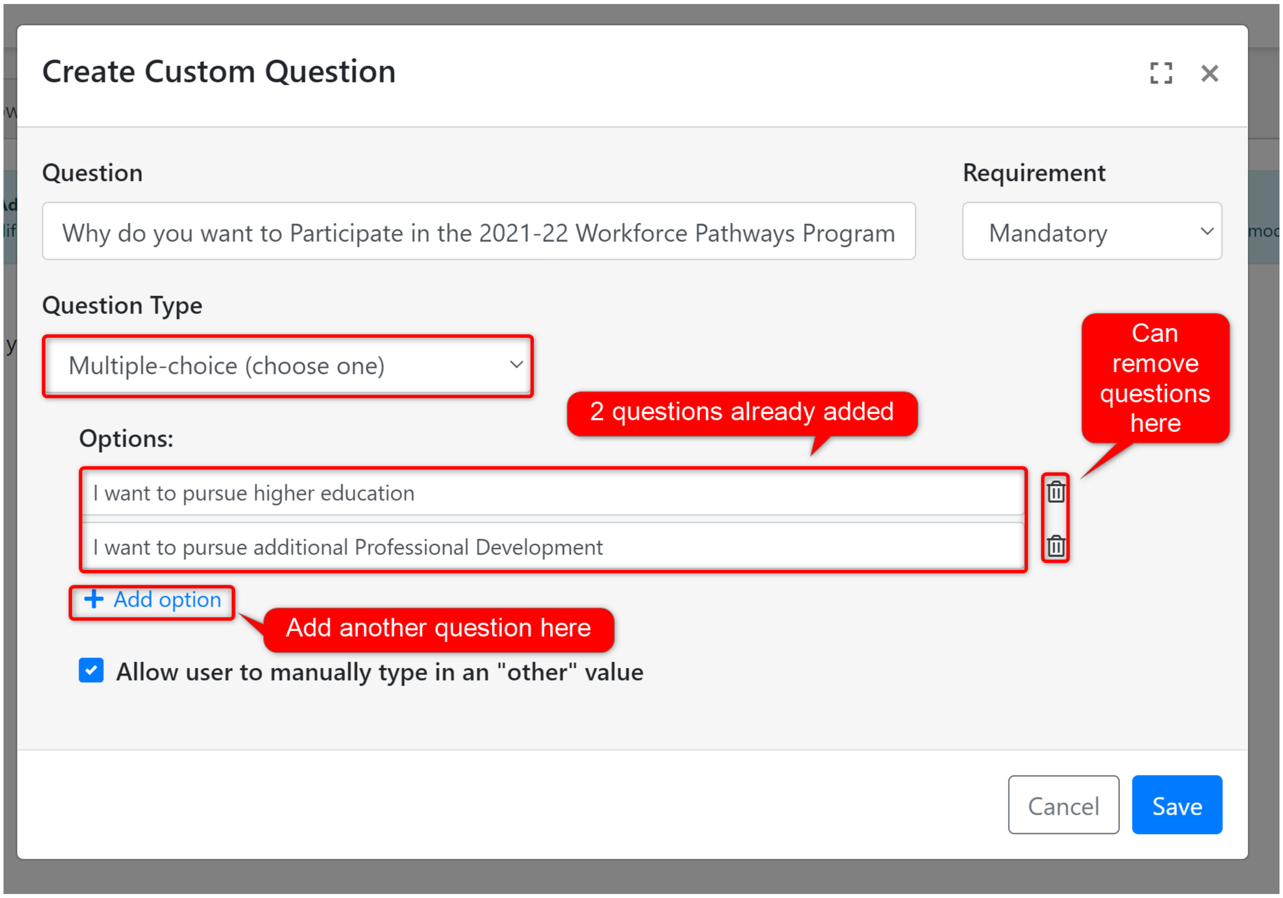


5 The final preference, and perhaps the most complex is the “Question Type”. Note that we have 3 question types to choose from, Text, Multiple-Choice (Choose one), and Multiple-Choice (Choose all that apply). We will display an example of each question type,

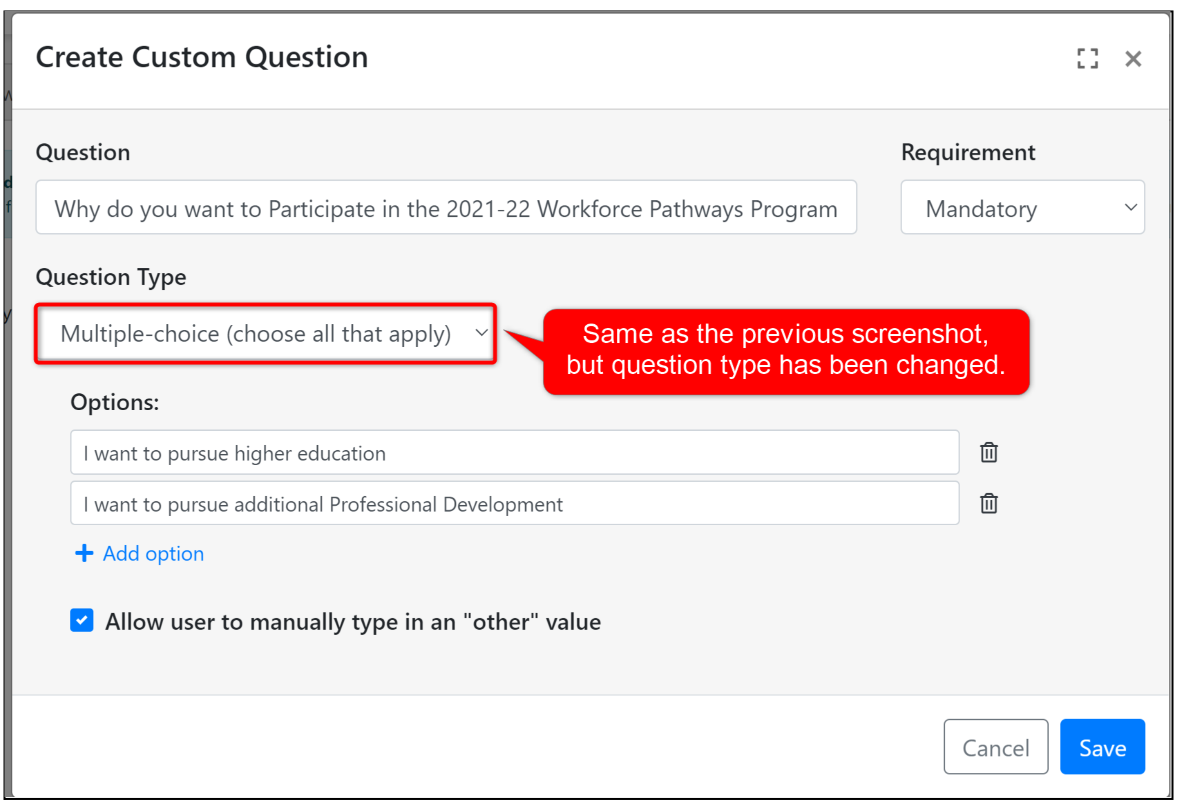
First is “Text”. This is the simplest option, and will allow the user to type in their response freely. This is the most open-ended option that you can select when creating a question.



6 The second option is for Multiple-Choice (choose one). If we opt for this, we are opting to give the user a list of options to choose from, and restricting them to a single entry. Note that the options that they receive are completely customizable by you, as we can see in the screenshot below:

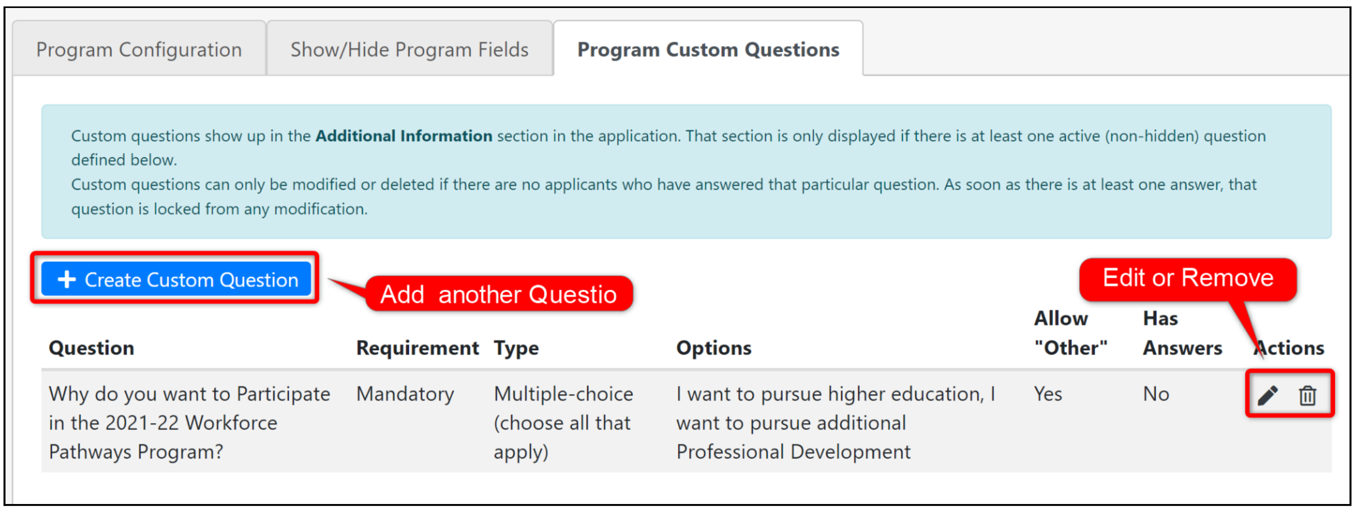


7 The final option is for Multiple-Choice (choose all that apply). If we opt for this, we are opting to give the user a list of options to choose from, and allowing them to select as many as they want. Note that the options that they receive are completely customizable by you, as we can see in the screenshot below:



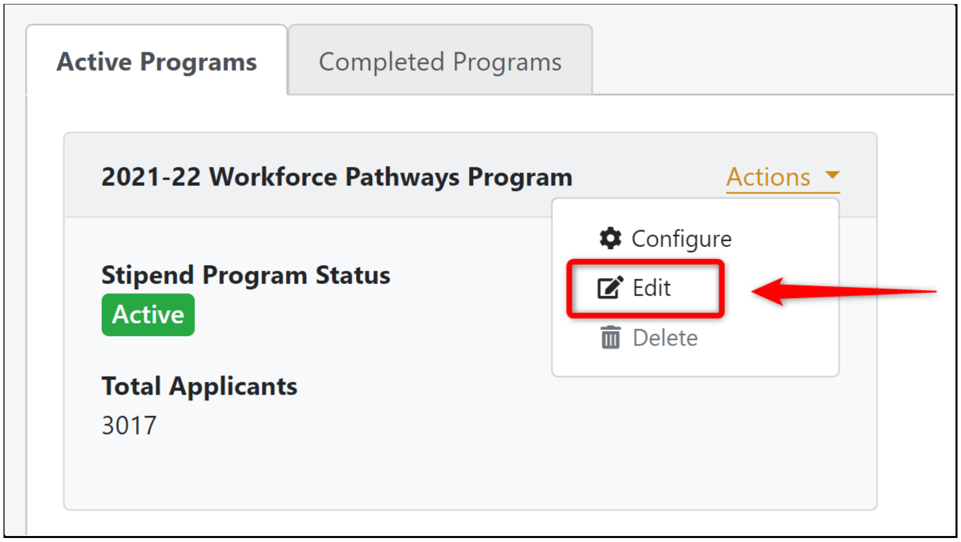
8 Once we are happy with the question that we have created, we can finalize our question by clicking on the blue “Save” button at the bottom of the modal.

9 We can see that our question has been added, and that we can edit it or remove it at any time (as long as no applicant has responded to it and submitted). We can also add another question if desired.

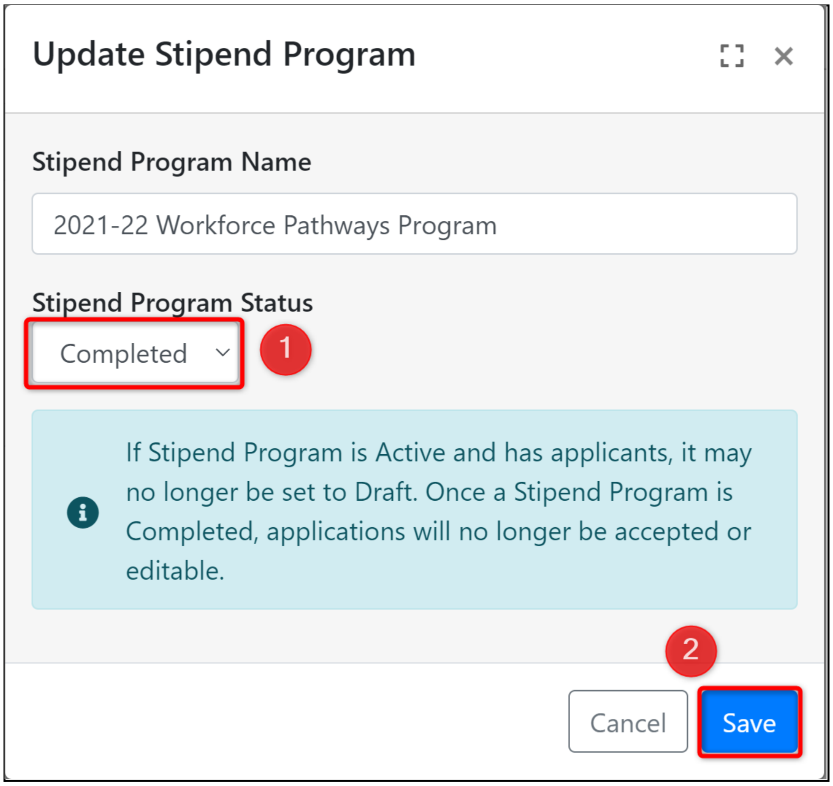


Completing a Stipend Program

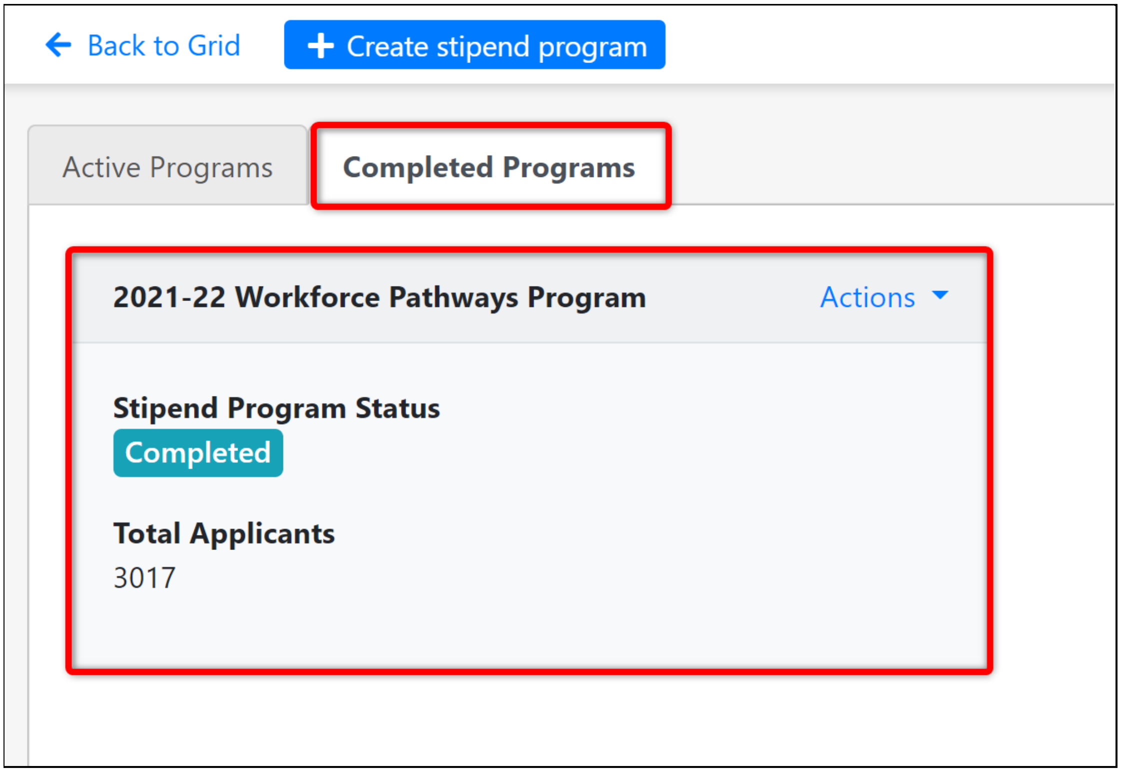
1 Once a stipend program has been completed and all applicants have been paid, we recommend closing out the Stipend Program by changing the status of it to “Complete”. We can do this from within the Stipend Program Configuration. We can find the program that we want to complete, and click on the blue “Actions” button and then select “Edit”.



2 From here, we can opt to update the status of the Stipend Program to “Completed” from the Drop-down, and then click on the blue “Save” button.



3 We can then observe our “Completed” Stipend program on the “Completed Programs” tab from within our Stipend Program Configuration page.



Sharing the Stipend Portal Login with the Workforce

Once you feel that your Stipend Program(s) have been configured the way you want them, and your tracks have been finalized, you may feel ready to share this information with the workforce. The workforce can access the Stipend Portal via a shareable URL that is unique to your organization.

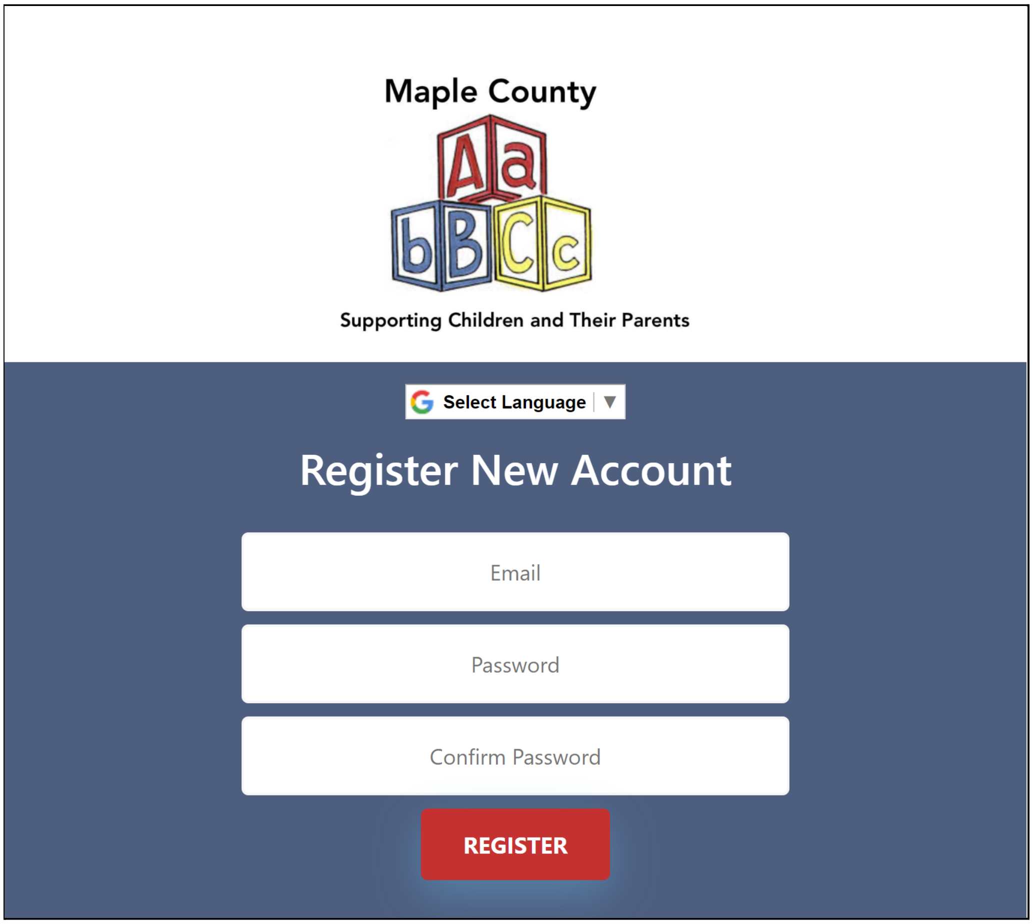
There are 2 links you will want to share with staff interested in accessing the portal and applying:

1. A first-time login link, for users that do not have a stipend portal account.
2. A login link for users that already have a stipend portal account from a previous stipend round.

Understand that even staff who have an existing Hubbe Login account **will still need to create a new account for the Hubbe Stipend Portal**. This means that the very first time you share your login link with the workforce, **you will always want to share the first-time login link**.

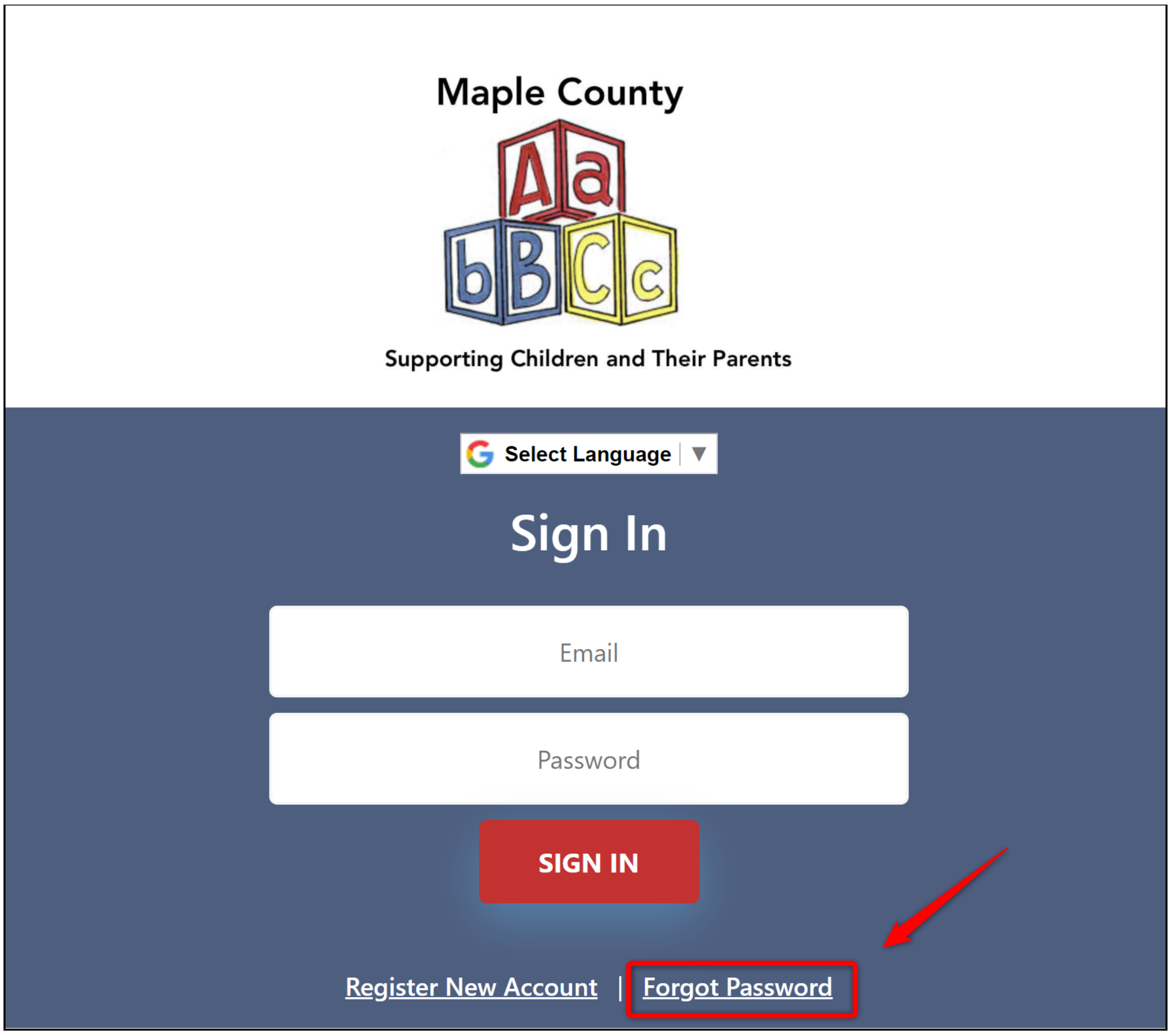
If this is the first time you are utilizing the Hubbe Stipend Application portal, then your unique login link will be your unique system URL + “StaffApplication/Account/Register”. So for example, in our Demo system Maple County, our system URL is demo.ipinwheel.org so our first-time login link for the stipend portal will be demo.ipinwheel.org/StaffApplication/Account/Register.

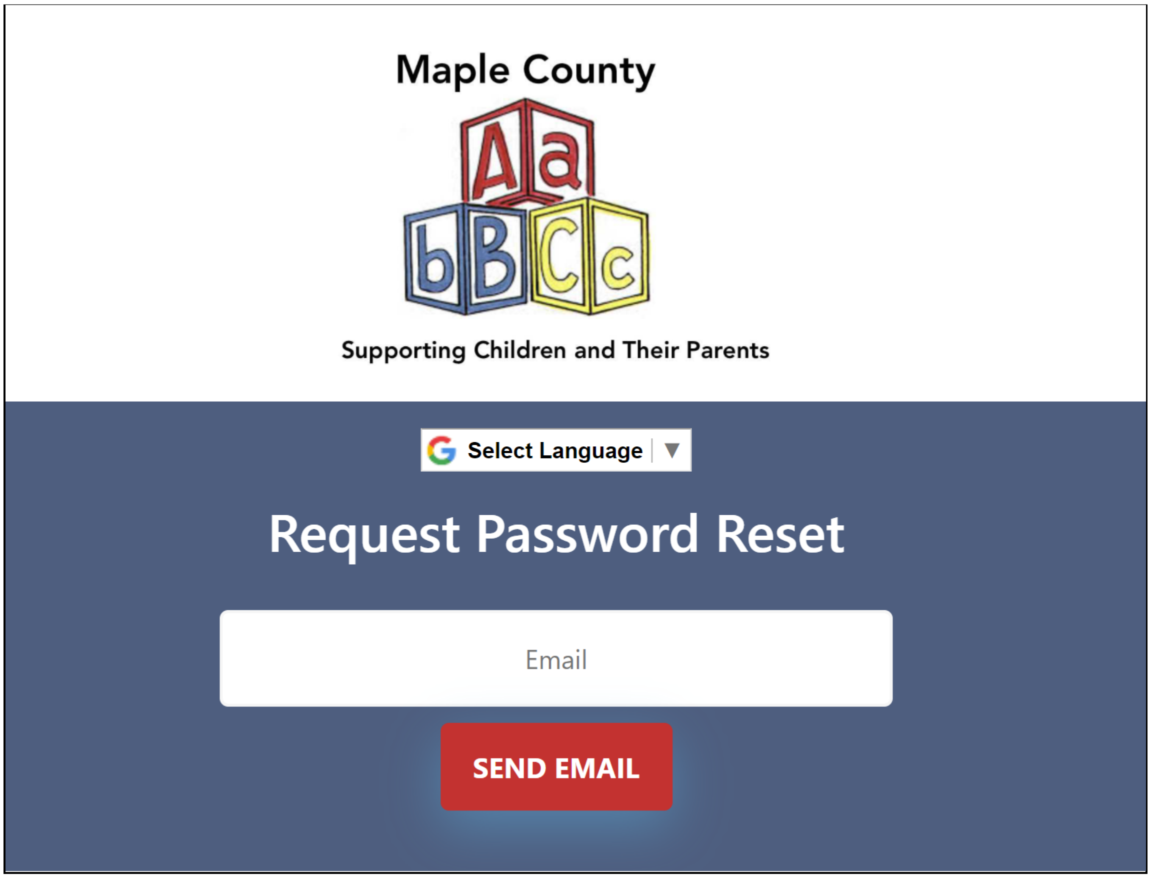
From this page, users will be prompted to create their Stipend Portal Account (which they can do on their own). Upon verifying their email address, they will be able to access the stipend portal, and begin applying. The page to register their new account will look something like this:



For those users that *already* have an account for the Stipend Portal (meaning it is at least your second round of the application process), the login link that you share will be your system URL + “StaffApplication/Account/Login”. So for example, in our Demo system Maple County, our system URL is demo.ipinwheel.org so our returning user login link for the stipend portal will be demo.ipinwheel.org/StaffApplication/Account/Login.

From this page users will be prompted to login to their Stipend Portal account. Ideally, they will remember their login information from the previous cycle, but we know this is not always the case. For that reason, we added a link titled “Forgot Password” where staff can reset their password information via email if needed. See below for what the login screen looks like, as well as the password reset page (if needed).





In summary, when you are ready for the workforce to begin logging in and applying for their Stipends, you can share your county/program's custom URL for the Stipend Portal. Just remember to be intentional about which of the 2 links you are sharing, as this can make the process much more efficient if you contextualize the 2 links and the use cases in which they should be used.