Stipend Preparation & Overview

Roles that Have Access: Funder Admin

The Hubbe Stipend Management feature allows you to create county ECE Workforce stipends that track staff participants' progress. The Funder Admin has complete access to the feature and does not need to be assigned any additional roles to manage stipends. The Stipend Manager role has the same level of access to the stipend management feature as the Funder Admin and should be assigned to county staff who will be creating/managing stipends. The Stipend Approver role cannot create or modify a stipend, but can assign their caseloaded staff to stipends and then track their caseloaded staff participants' progress and approve completed requirements.

Before creating and managing stipends, the Funder Admin should assign stipend management roles to county staff. This instruction sheet will explain how to navigate to the feature, assign roles, and provide a brief overview of the stipend management record in Hubbe.

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The Stipend Management Feature can be accessed within the "County Menu" on the left-hand side of your screen.
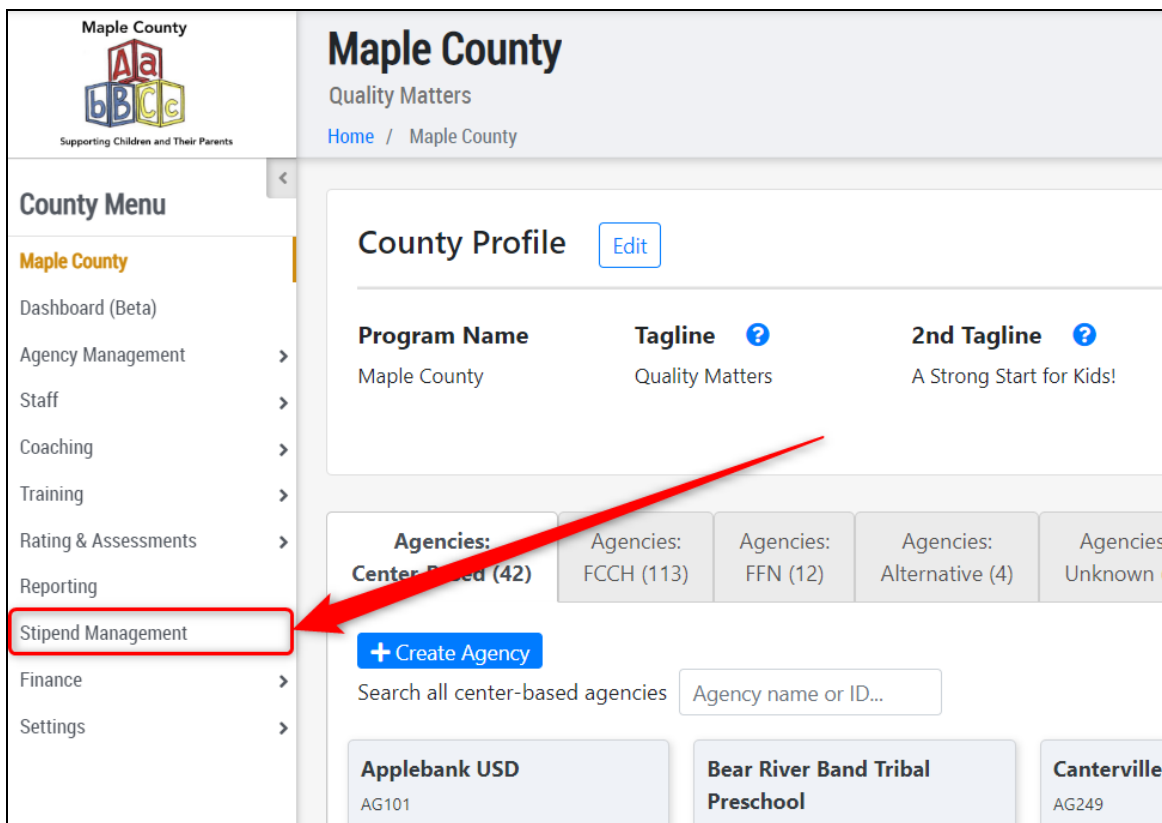
Two roles were specially created for this feature, "Stipend Manager" and "Stipend Approver."

- You would assign the "**Stipend Manager**" role to the person in your organization who is responsible for managing the stipends for your county/consortia. The "Stipend Manager" role will have access to stipend budgets and marking stipends as paid. This role grants high level permission and access to the assigned staff. Responsibilities in Hubbe include creating a stipend track, assigning staff to stipend tracks, and caseloading staff participants to Stipend Approvers.

- The "**Stipend Approver**" role does not have as much access as a "Stipend Manager" role. The "Stipend Approver" role cannot mark things paid nor can this role establish stipend budgets, having no influence over the monetary part of stipends. Additionally, a "Stipend Approver" cannot edit parts of the stipend, such as the instructions, details, and requirements. However, this role revolves around managing participating ECE workforce members in their stipend tracks. Responsibilities in Hubbe include assigning their caseloaded staff to stipend tracks and monitoring the staff's progress, including approving completed stipend requirements.

    Note: The reason we gave the "Stipend Approver" the ability to assign staff to a stipend track is because they can deal closely with ECE staff in deciding the best stipends for them and managing their progress within those stipends.

The stipend process starts with assigning the "Stipend Manager" and "Stipend Approver" roles. The role "Funder Admin" has complete access to the stipend features, so there is no need for Funder Admins to additionally assign themselves the Stipend Manager role to manage and view data.

Similar to assigning any other role inside of Hubbe, you must first create a QRIS staff record. There are two ways to create a county staff record: First, you can click on the "Staff" drop-down menu on the left-hand "County Menu", and click on "County Staff"; second, you can click on the "County Staff" tab located on the county record. If you need help creating a QRIS staff record, please reference Instruction Sheet 103 "How to Create a County (QRIS) Staff Record, Log-In Credential, and Assign a County (QRIS) Role." You can find this instruction sheet and other tutorials by clicking on the "Instructions and Training Videos" link located under the "Help" drop-down menu at the top right corner of your screen.
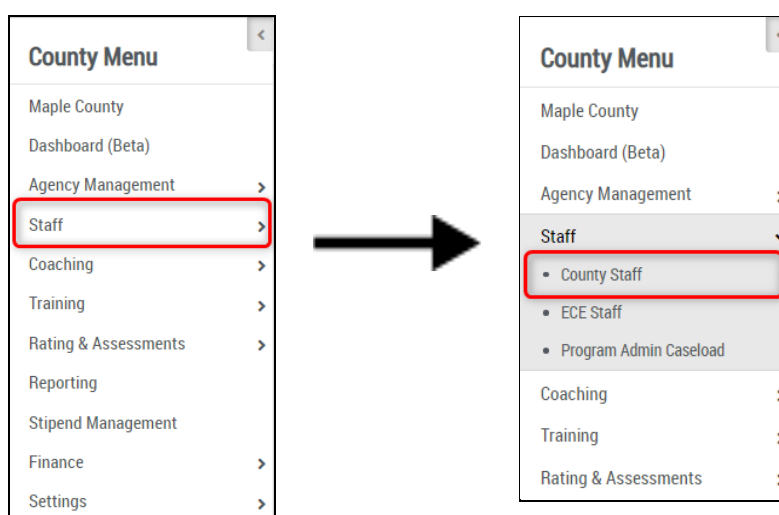
~OR~
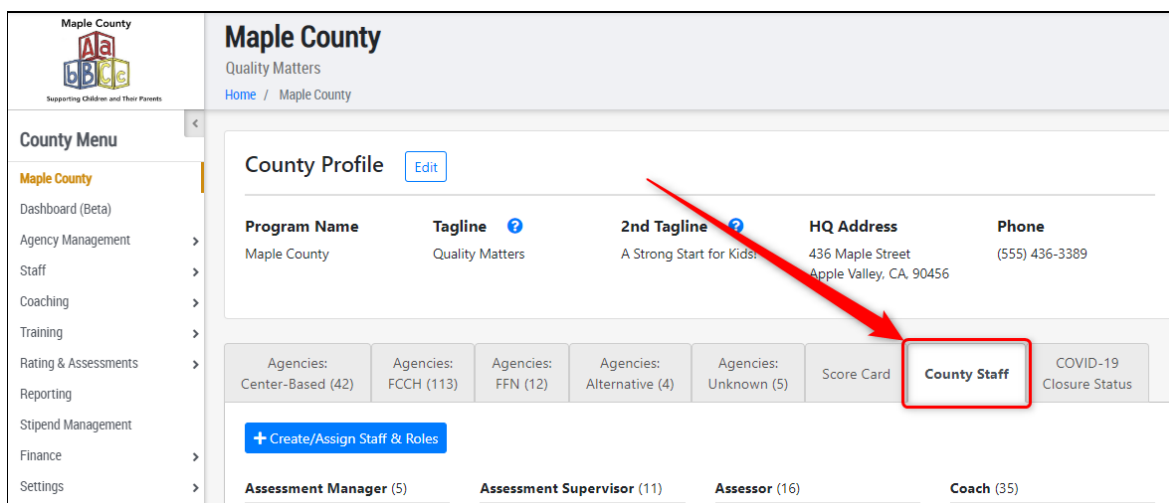
Note: Both of the options described above allow you to _create a staff record_. To _assign a role_ to the new or existing staff record, such as the role of "Stipend Manager" or "Stipend Approver," you must navigate to the "County Staff" tab on the county home page, i.e. the second option pictured above.
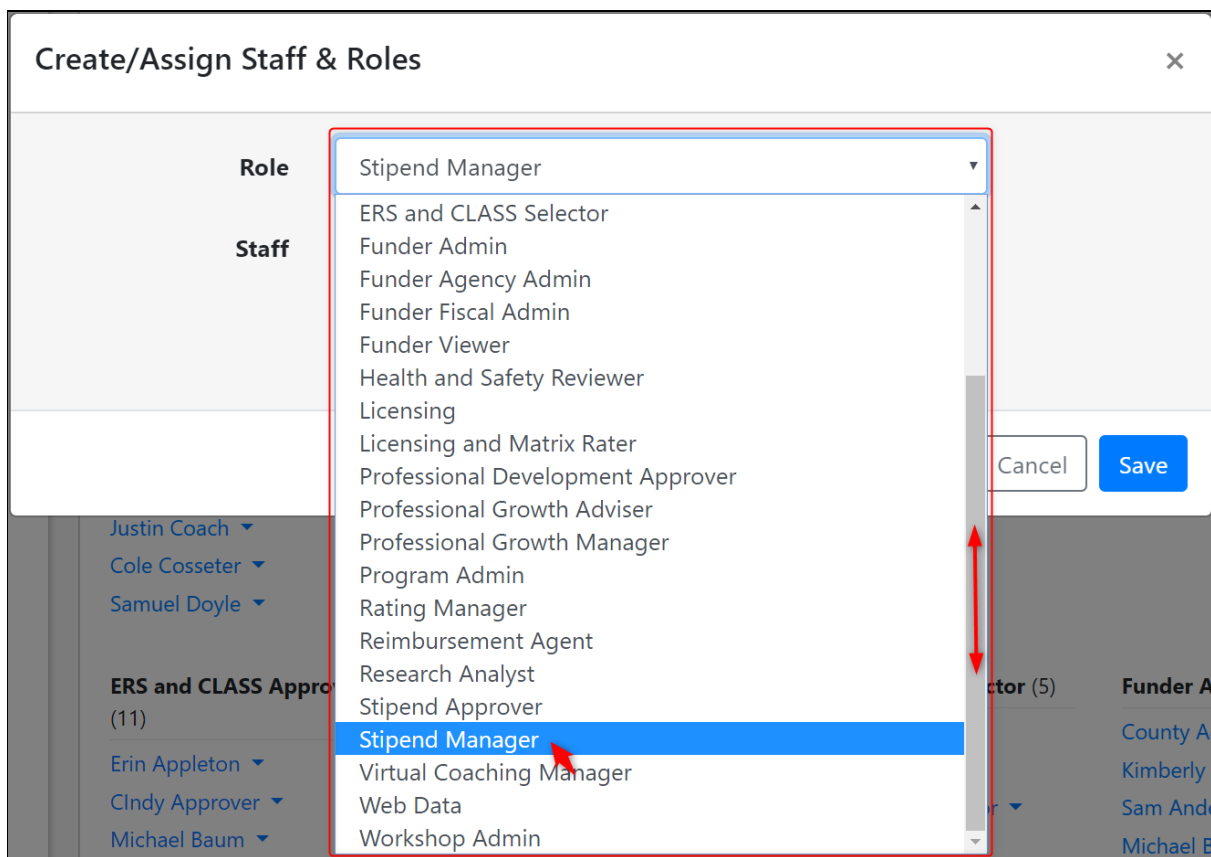
1 Click on the blue "Create/Assign Staff & Roles" button in the "Count Staff" tab on the county record.
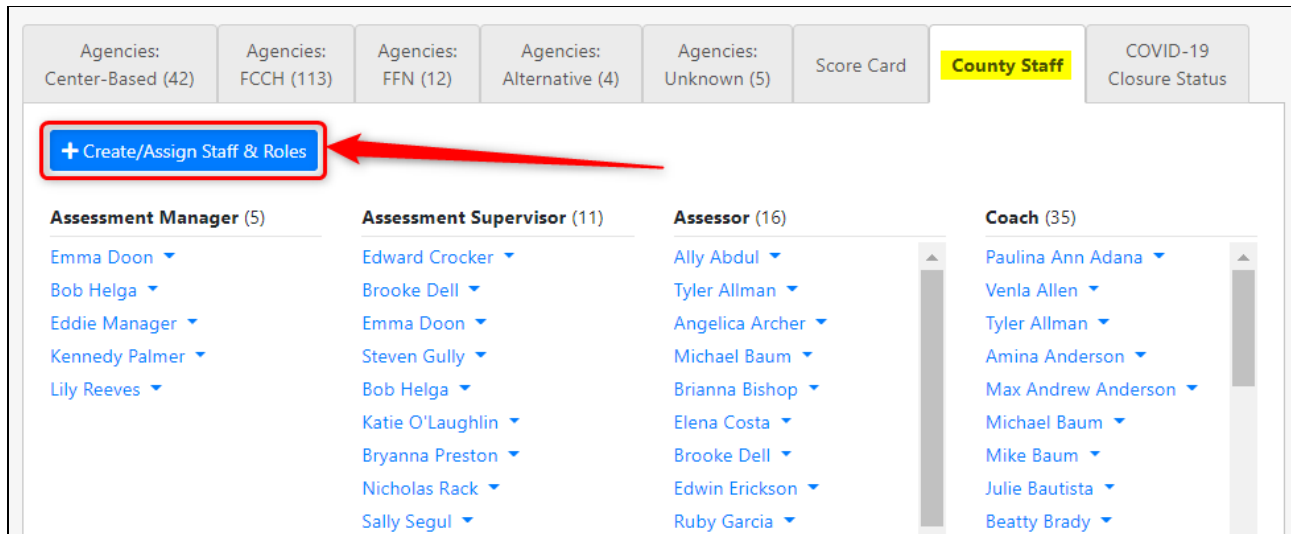
2 Click on the "Role" drop-down menu and select "Stipend Manager" or "Stipend Approver" (The process for assigning both roles is identical, so the screenshots will only feature the assignment of the "Stipend Manager" role).

Note: The roles are listed in alphabetical order. You must scroll down the drop-down list of roles to locate "Stipend Manager."

3 Click on the "Staff" drop-down menu and select the staff member that you would like to assign the role to.

Create/Assign Staff & Roles ✕

Role   Stipend Manager ▾

Staff   - SELECT - ▴

Search in this menu...

ERSCLASSSelector, Eric
Estrada, Alexis
Fiscal, Frieda
Foley, Clifford
Fondera, Leah
Fonta, Elvis
Forrest, Kate

Cancel   Save

Justin Coach ▾
Cole Cosseter ▾
Samuel Doyle ▾

Note: The staff are listed in alphabetical order by last name. Similar to roles, you can scroll, or simply type in the name of the staff member that you want to assign the role to in the search field.

4 Once you've selected the appropriate role and staff member, click "Save." The role, along with its associated data access, will now be assigned to that staff member.

Create/Assign Staff & Roles ✕

Role   Stipend Manager ▾

Staff   Foley, Clifford ✕ ▾

* Assigning inactive staff will re-activate them automatically

+ Add a new staff member who isn't listed above

Cancel   Save

To assign a staff member to the "Stipend Approver" role, repeat steps 1-4 above, but select "Stipend Approver" as the role in Step 2, rather than "Stipend Manager."

To begin the Stipend Management process, click on the "Stipend Management" menu item in the "County Menu" on the left-hand side of your screen.

You will land on the "Stipend Tracks" record. This record is the landing page for the role "Stipend Manager." In other words, you as a "Funder Admin" will be viewing the same page as the "Stipend Manager" for your county/consortia. As mentioned previously, the role "Stipend Manager" has the same access and permission for managing stipends as does the role "Funder Admin."

At the top of the record, you will notice a blue "Create Stipend Track" button. This is where you can create a new stipend track, as explained later in this instruction sheet. The "Download Excel of Assigned Staff" button displays a drop-down menu when clicked, allowing you to download an Excel list of all the staff members assigned a *current* or *completed* stipend track.
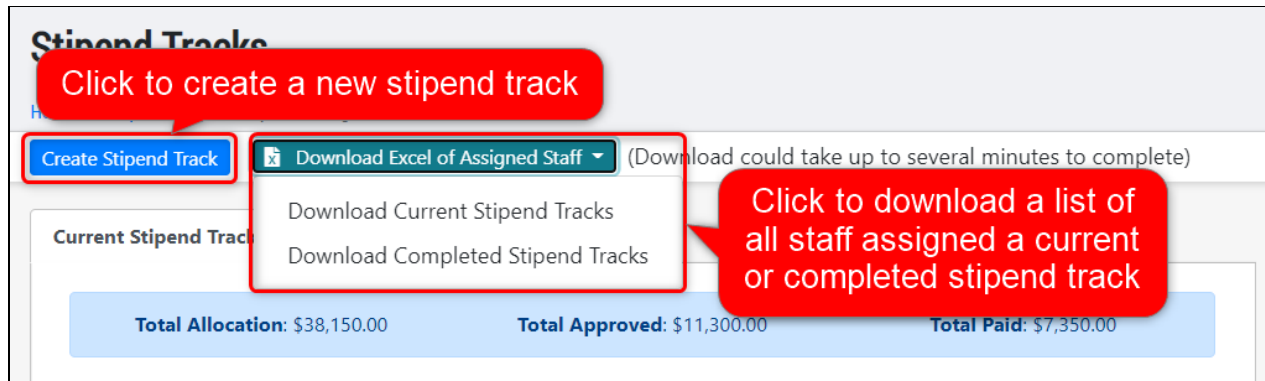
The Stipend Tracks record is organized to bring you all the stipend information for your county/consortia. This record will display three tabs: "Current Stipend Tracks," "Assign Staff & Caseload Approvers," and "Completed Stipend Tracks."

The "Current Stipend Tracks" grid provides you with high level information about each of the stipend tracks that are currently in progress, meaning it is within the dates of the stipend. The blue ribbon on the top of the tab displays total amounts for all the stipend tracks setup in your county/consortia. Hubbe will calculate the math for you and will automatically update the dollar amounts as you, and your staff create new stipend tracks and approve stipend requirements. This feature is designed to help your stipend team manage the stipend tracks and budget efficiently.

You can sort the grid in ascending and descending order by clicking on the column headers. The grid also has a "Search" feature that allows you to search by title.

To view a stipend track, click on the "Title." You will be led to the Stipend Track's record where you can manage the stipend.

As your stipend management team creates stipends, they will display in the "Current Stipend Tracks" grid. We will provide you with a description of each column in the grid below.


- **Title** — The name of the stipend track will be displayed in this column. Click the title to navigate into the stipend track.
- **Budget** — The "Budget" column displays the budget established for each stipend created.
- **Amount per Stipend** — The "Amount per Stipend" allows anyone who participates in a specific stipend to see their eligibility amount.
- **Budget Category/Cost Code** — This column serves to help you organize stipends so you can search/filter easily for certain budget categories or cost codes.
- **Total Allocation** — As you work inside of Hubbe and mark stipends available to staff inside of the system, the data system is going to keep track of the total allocation amount in the "Total Allocation" column. This column keeps track of the amount you are committing or potentially committing to avoid the possibility of overextending any of the tracks. The dollar amount displayed in this column is based on the staff that have been accepted to participate in the stipend and who are enrolled in the program, as well as the requirements within the stipend that the staff member will be pursuing.
- **Total Approved** — The "Total Approved" column displays the people who met the requirements and are ready to get paid.
- **Total Paid** — The "Total Paid" column shows the amount paid to the participants who met the stipend requirements.
- **Total Balance** — This column displays the remaining stipend budget for each stipend track. The amount displayed is the "Budget" minus the collective amount in the "Total Allocation," "Total Approved," and "Total Paid" columns.
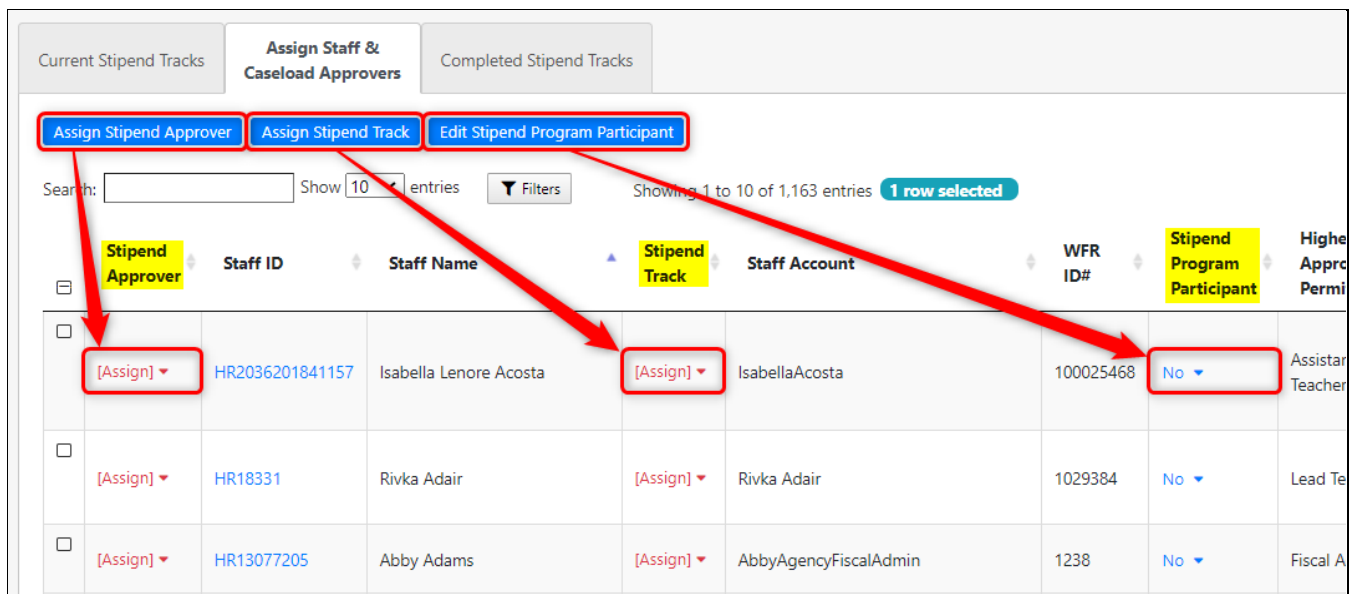
The "Assign Staff & Caseload Approvers" tab is intended to provide you with an easily accessible place to do just that: assign ECE staff to stipends and caseload Stipend Approvers with ECE staff.

Funder Admins and Stipend Managers can perform both of these tasks in this tab. Stipend Approvers also have the ability to assign staff to stipend tracks, so as the Funder Admin or Stipend Manager, you may want to use this tab to caseload the Stipend Approvers their ECE staff caseload. By organizing the stipend record like this, we have given you the option of caseloading Stipend Approvers to their ECE staff before the staff is placed in a stipend track, giving the Stipend Approver the flexibility to work with their caseloaded staff to determine which stipends are right for them before they are assigned stipend tracks.
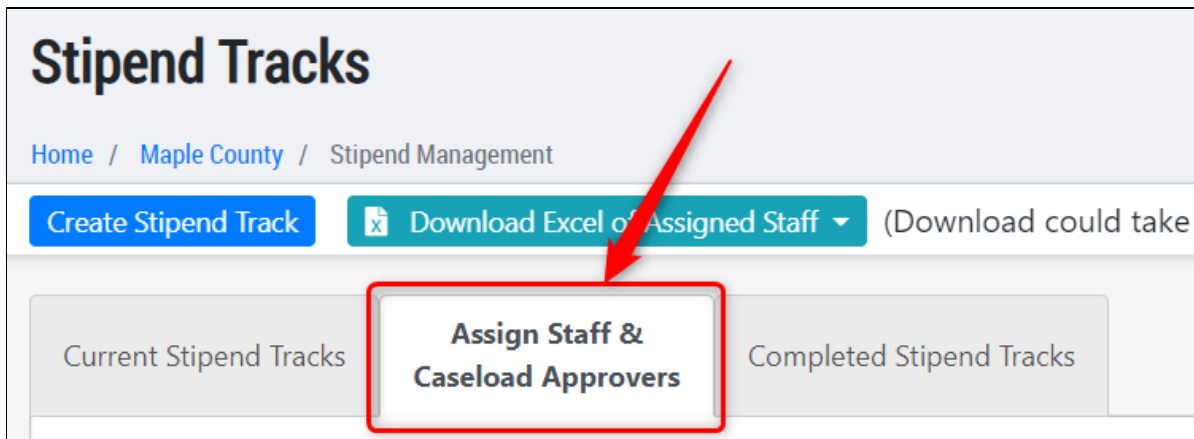
There are three actions that you can make within the grid: Assign Stipend Approver, Assign Stipend Track, and Edit Stipend Program Participant field. Each of these actions can be made by clicking the cell within the staff member's row in the grid on an individual-basis, OR for multiple staff at one time by selecting the staff in the grid and then clicking the desired action button near the top of the tab.

The "Completed Stipend Tracks" grid displays stipend tracks that have ended, which means the date range that the stipend was available has ended.

You can view information on a stipend track by clicking on a title (*reference the image below*). You will be able to view information, requirements, and staff that completed the stipend track. You also have the ability to copy a stipend track from previous years, making it easier to roll over recurring stipends year-to-year. The copied stipend track will then appear in the "Current Stipend Tracks" grid.

In "Reports," under the "Data Tools" drop-down at the top left of your screen, there are two stipend reports. These two reports are located under the "Staff" tab on the reports page.
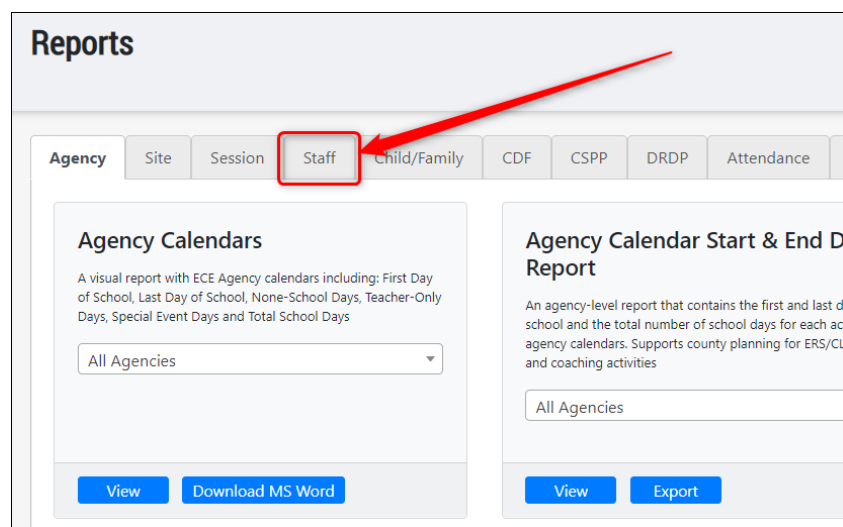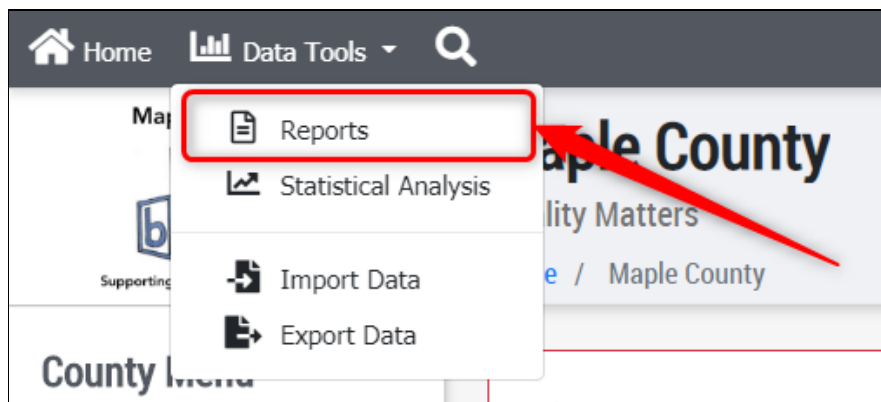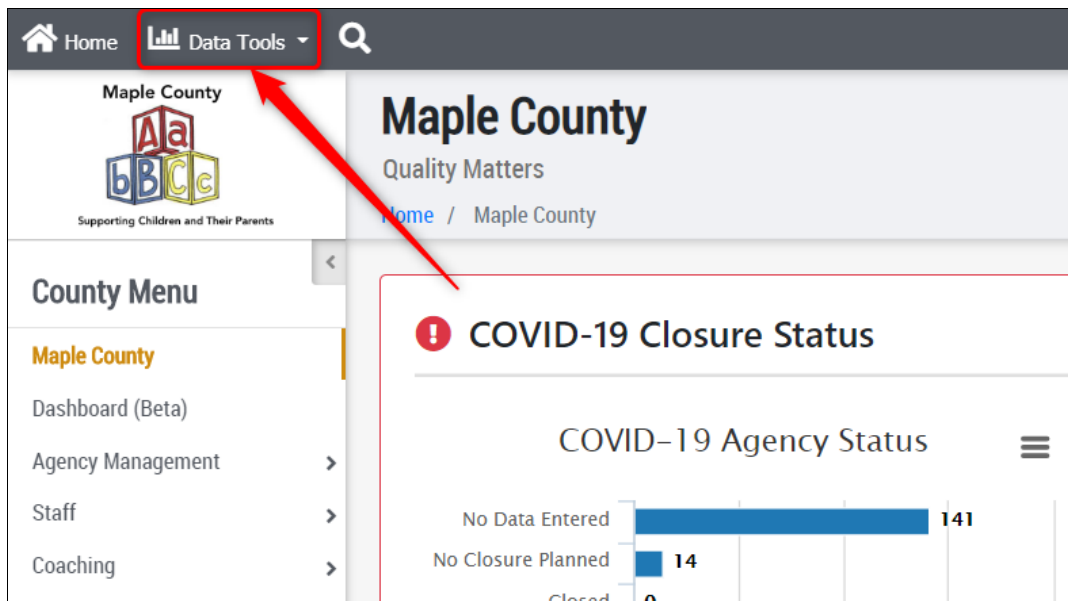
There are two stipend report options: "Stipends Reports - **By ECE Staff**" and "Stipends Report - **By Stipend Track**." When you view the reports, you will get information on all the staff participating in the stipend programs for your county/consortia. You will be able to see the status for each person in one place.

If you wish to only see data on one stipend track, or one agency, you can sort the data using the drop-down list with each report tile.

Note: You can scroll or search to find the specific agency/stipend track that you need.

Now that you have become acquainted with your Stipend Management feature and have assigned roles to county staff, the next steps are to create/manage stipend tracks and manage staff within a stipend as they make their way through the requirements. Please click the links below to access details and instructions for how to continue your stipend process.

Stipend Management Resources		
Topic	**Role(s)**	**Instruction Sheet**
Step 1: Setting Up a Stipend Track	Funder Admin, Stipend Manager	[Instruction Sheet C9.2.1](#)
Step 2: Managing Assigned Staff in a Stipend Track	Funder Admin, Stipend Manager, Stipend Approver	[Instruction Sheet C9.2.2](#)
Step 3: Updating Staff Stipend Requirements	Funder Admin, Stipend Manager, Stipend Approver	[Instruction Sheet C9.2.3](#)