Updating Staff Stipend Requirements

Roles that Have Access: Funder Admin, Stipend Manager, Stipend Approver

The Hubbe Stipend Management feature allows users to seamlessly integrate stipend requirements with staff records. The requirements feature automated completion, overriding capabilities, manual completion, and a unique feature that indicates which requirements are being pursued by participating staff to give an accurate allocation of the stipend's budget. This instruction sheet explains how to manage staff's requirement progress within a stipend track.

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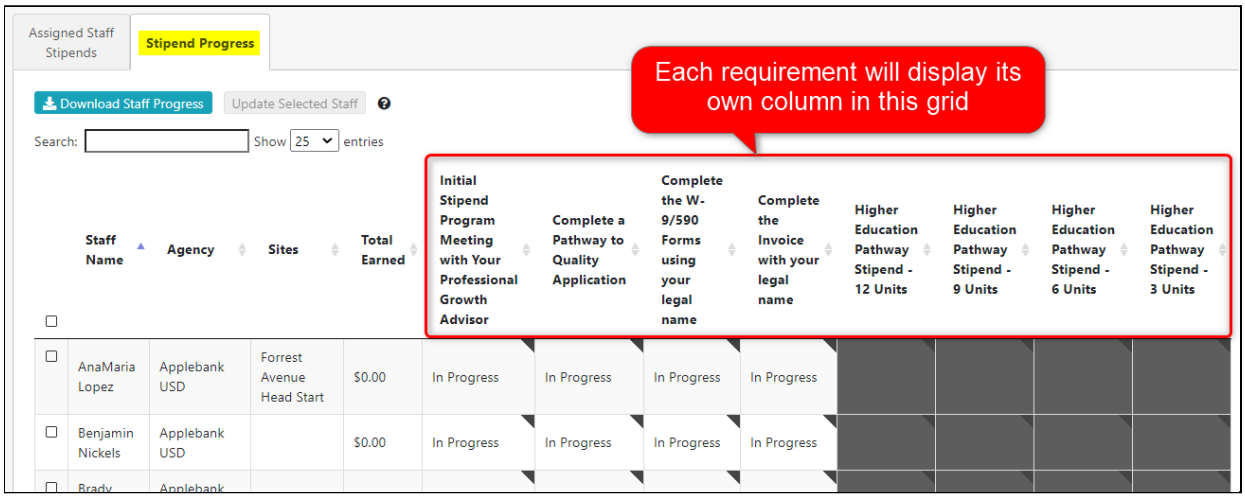
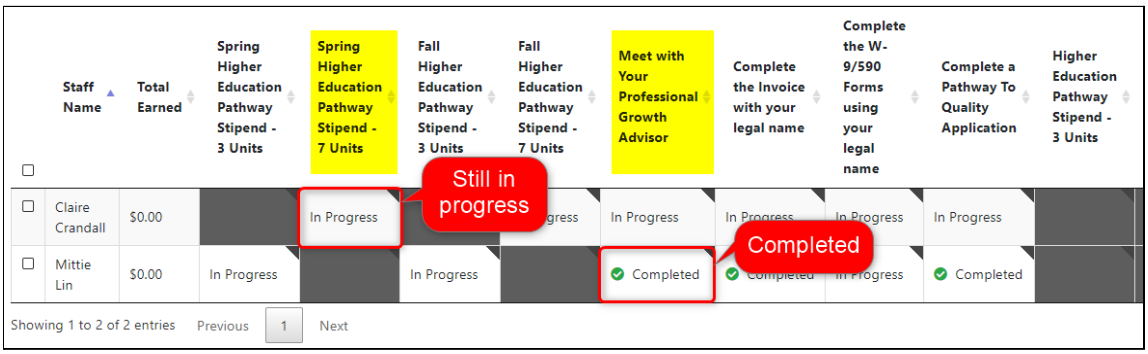
Updating Staff Stipend Progress

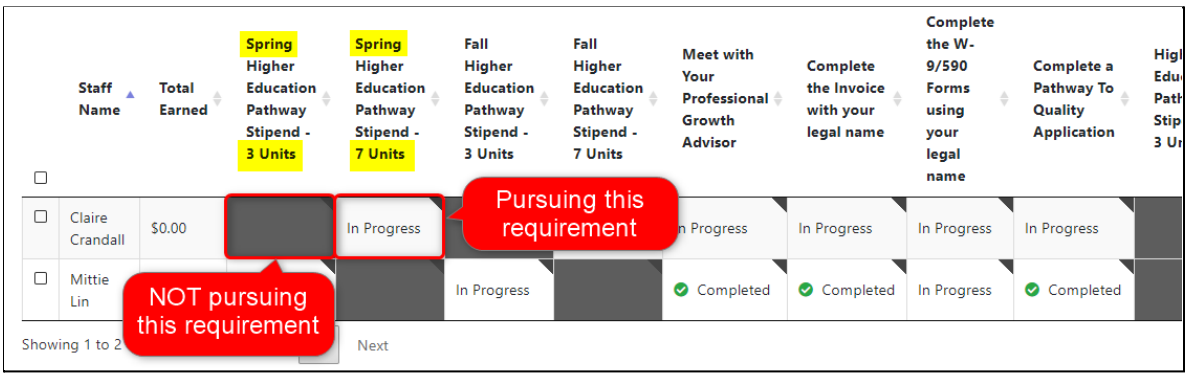
Within the “Stipend Progress” tab, each requirement included in the stipend program will exist as a column in the grid.



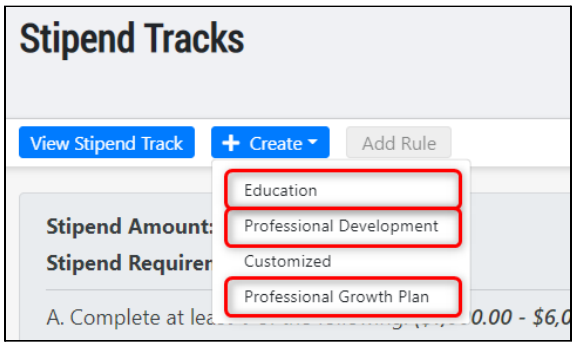
Each column displaying a requirement will display the progress that staff member has made on that requirement. In the example below, Claire is still in the process of completing the “Spring Higher Education Pathway Stipend-7 Units” requirement, while Mittie has completed her “Meet with Your Professional Growth Advisor” requirement.



The greyed-out fields indicate that the staff member is not pursuing that requirement. This helps to accurately allocate the stipend’s budget by selecting which requirements the staff member is pursuing and will be paid for. To learn how to do this, please refer to the “Indicating Requirements Pursued” section below.

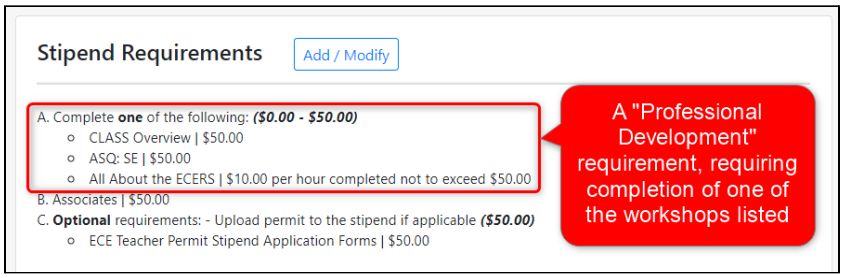


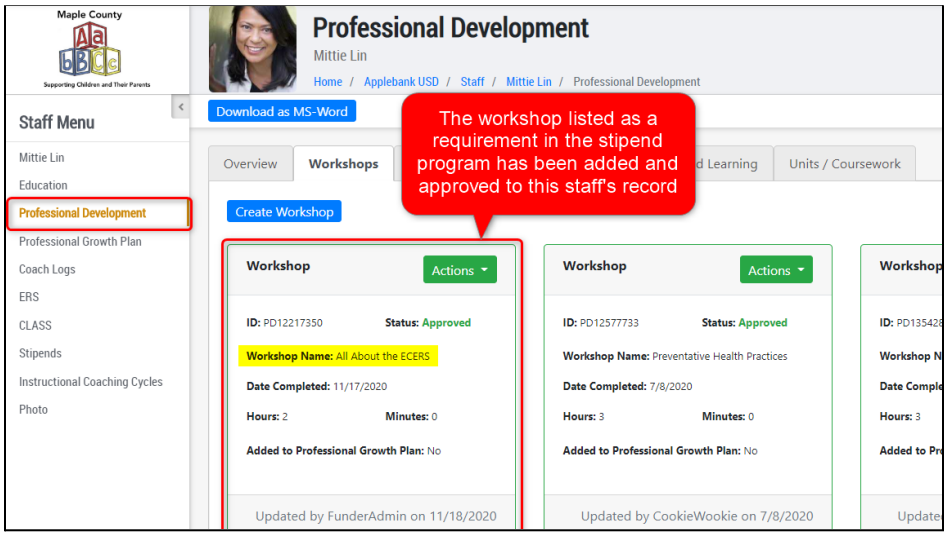
For “Education,” “Professional Development” (PD), and “Professional Growth Plan” (PGP) requirements, the status will be automatically updated as “Completed” when the appropriate data has been entered into Hubbe in the participating staff’s record, such as a workshop in their PD record.

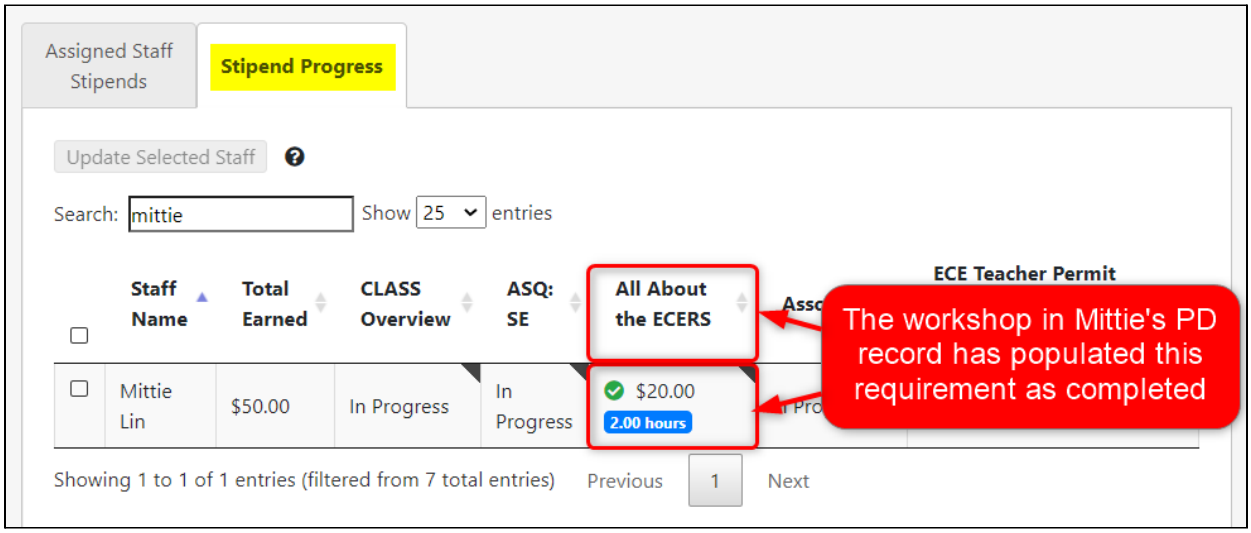


For example, if there is a “Professional Development” stipend requirement, once one of the workshops listed in the stipend program has been added and approved in the staff member’s “Professional Development” (PD) record, the data will populate the field within that staff member’s row on the Stipend Track page within the “Stipend Progress” tab at the bottom of the page. Please refer to the section titled, “Automating Requirement Completion” for instructions on how to enter a workshop to automatically satisfy a stipend requirement.

Notice that Mittie Lin has the “All About the ECERS” workshop in her “Professional Development” record, which is listed as a stipend requirement. The number of hours she spent at the workshop and the total amount of money that Mittie has earned for the workshop has populated within her “Stipend Progress” field in the workshop’s column.



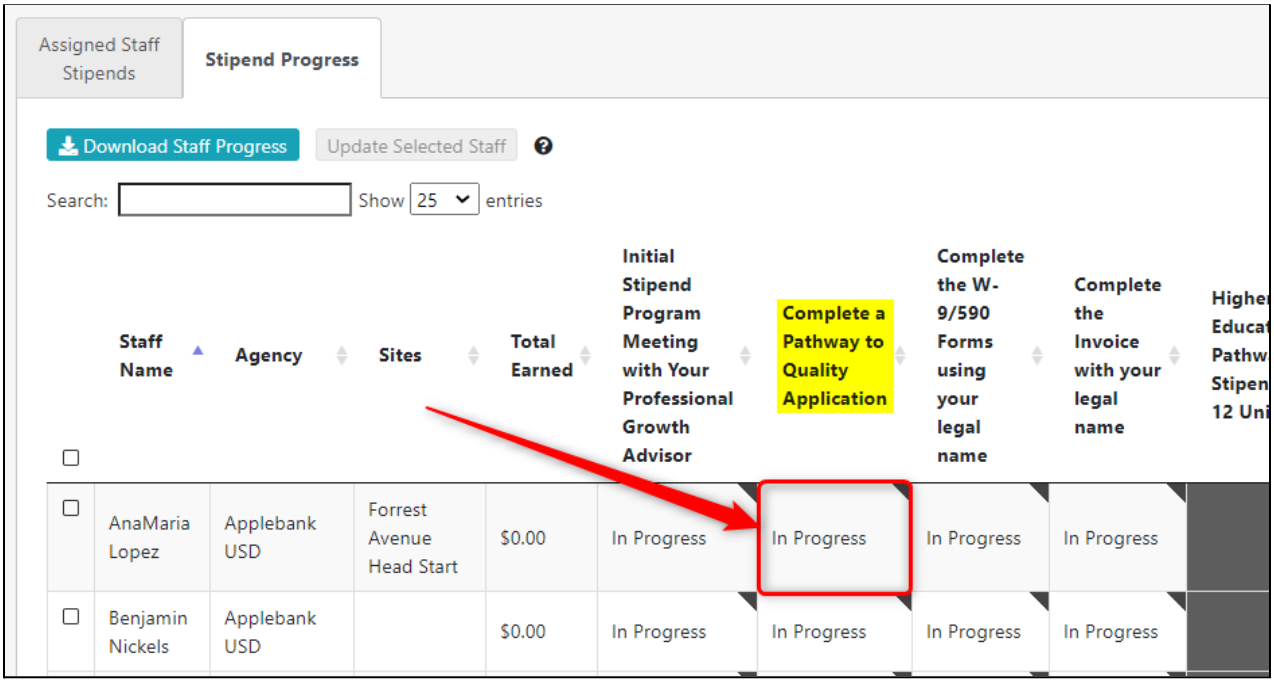




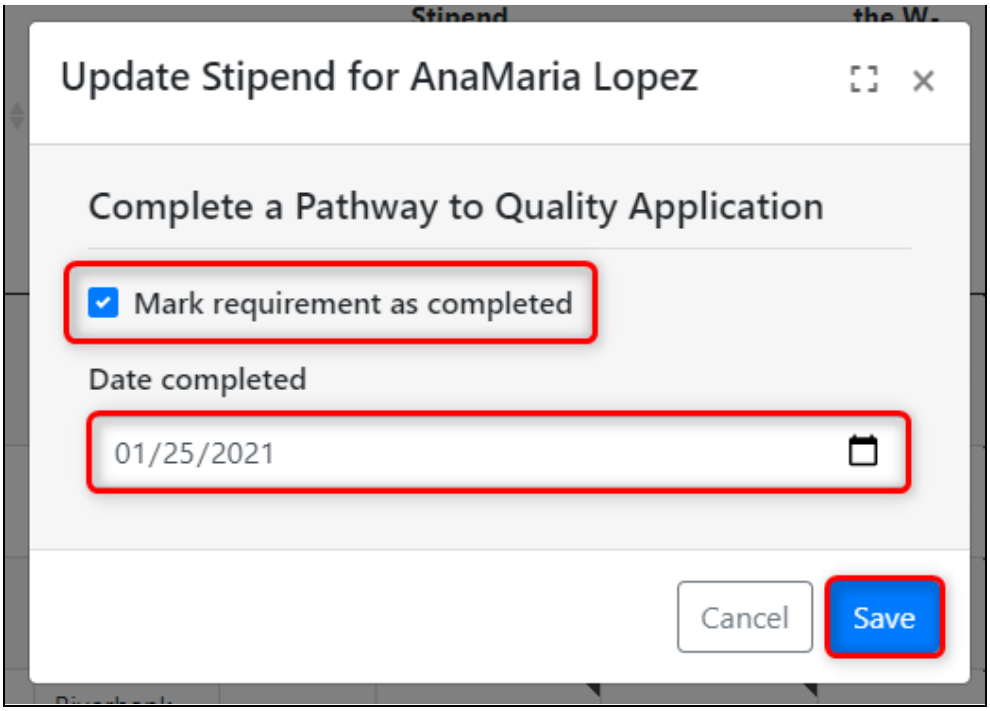
Marking Customized Requirements as Completed

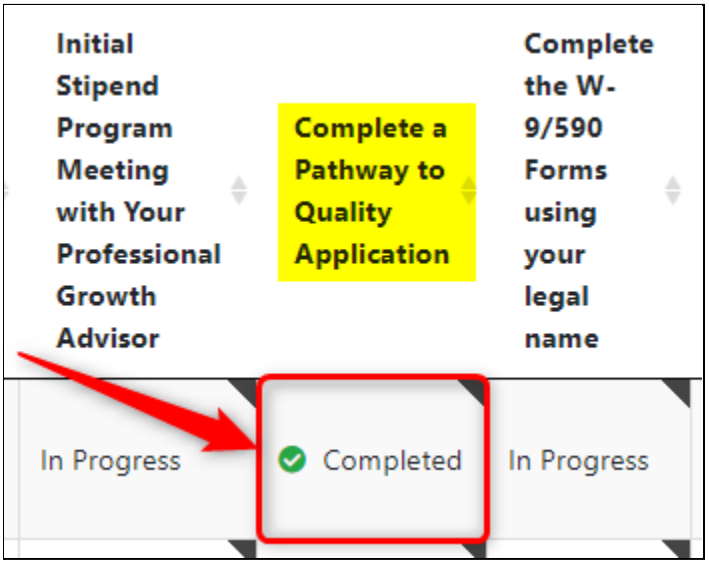
1 A “Customized” stipend requirement will not be connected to any data entered into the Hubbe data system, since it is used when the requirement does not fall under one of Hubbe’s requirement categories (Education, Professional Development, and Professional Growth Plan). As such, these requirements must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

In the example below, the “Complete a Pathway to Quality Application” requirement is a “Customized” requirement, so it needs to be marked “Completed” manually. To do so, click on the field in that column in the staff member’s row for which you want to mark the requirement as completed.



2 In the modal that appears, select the “Mark requirement as completed” checkbox, enter the date of completion, and then click “Save.” The requirement will then be displayed as “Completed” with a green checkmark for that staff member.

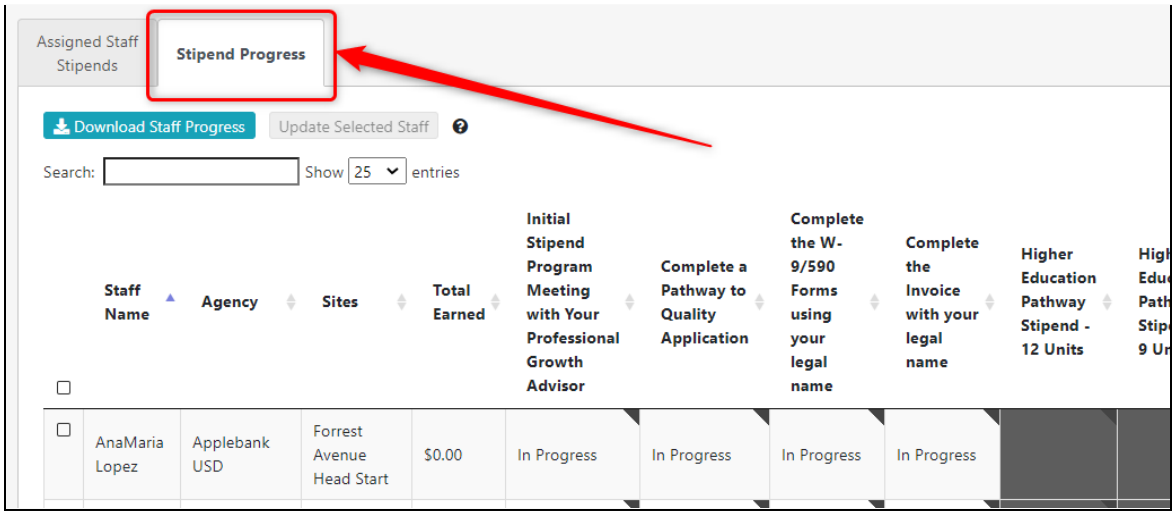




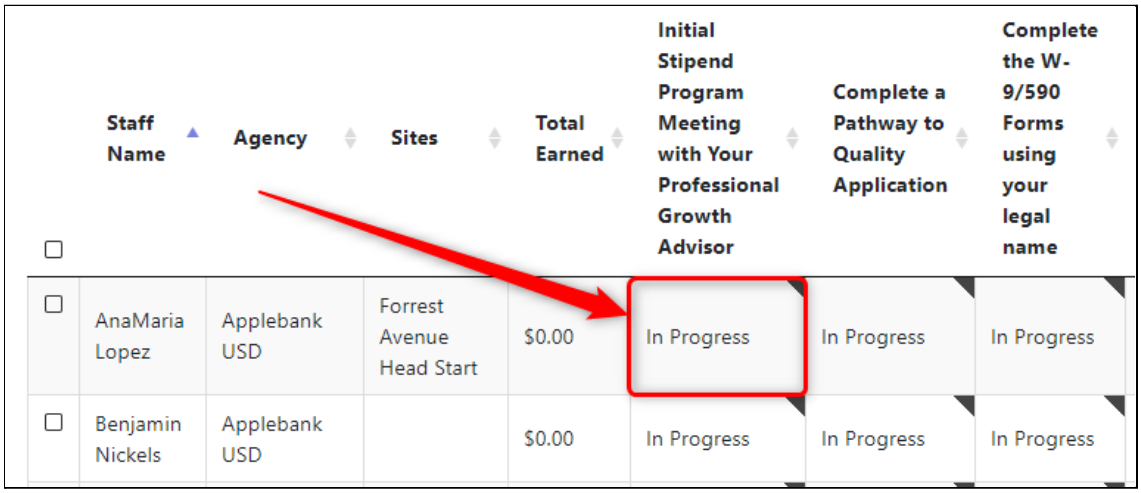
The Requirements of a stipend program are set up to be integrated with the data within the Hubbe system. For example, if a requirement is to attend and complete a workshop, once that workshop is entered and accepted in a staff member's "Professional Development" record, it will be automatically marked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

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

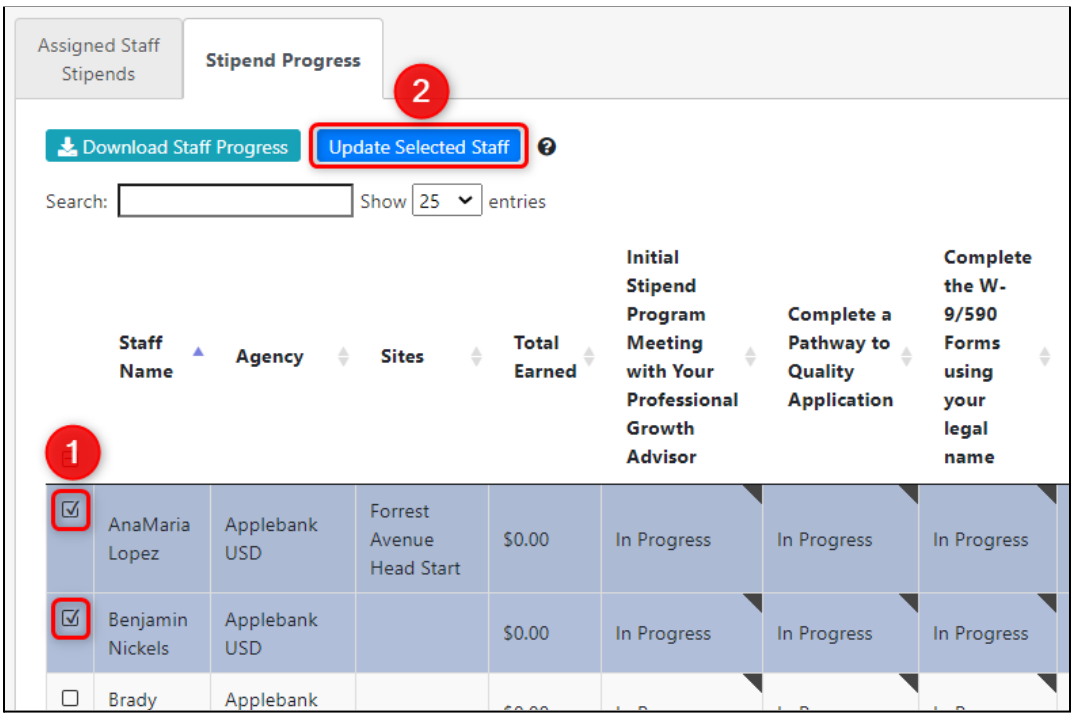
1 First, enter the "Stipend Progress" tab.



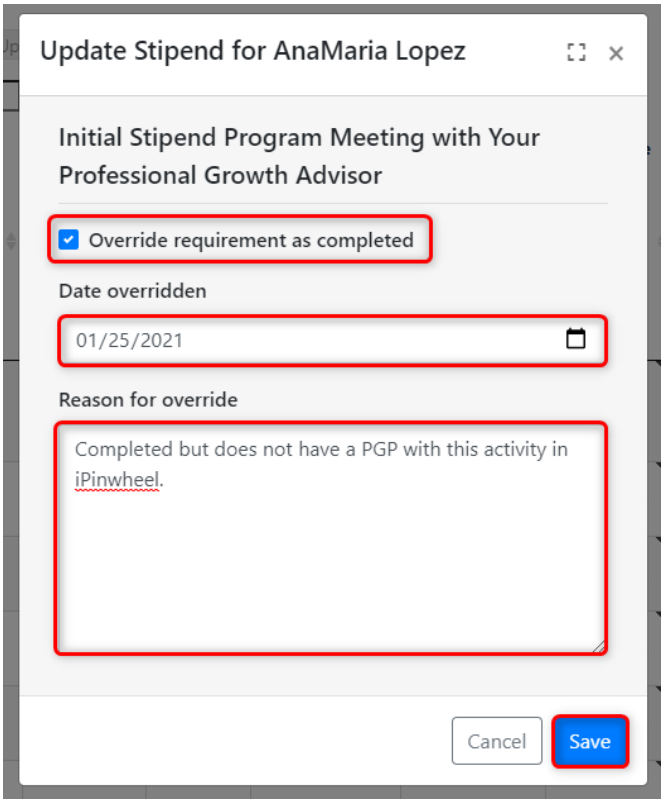
2 **Option A- One Staff Member at a Time:** To override a requirement and mark it as completed, click on the requirement field for the staff member you'd like to update. In the example below, we want to override Ana's "Initial Stipend Program Meeting with Your Professional Growth Advisor" requirement, so we will click the field for that requirement in Ana's row.



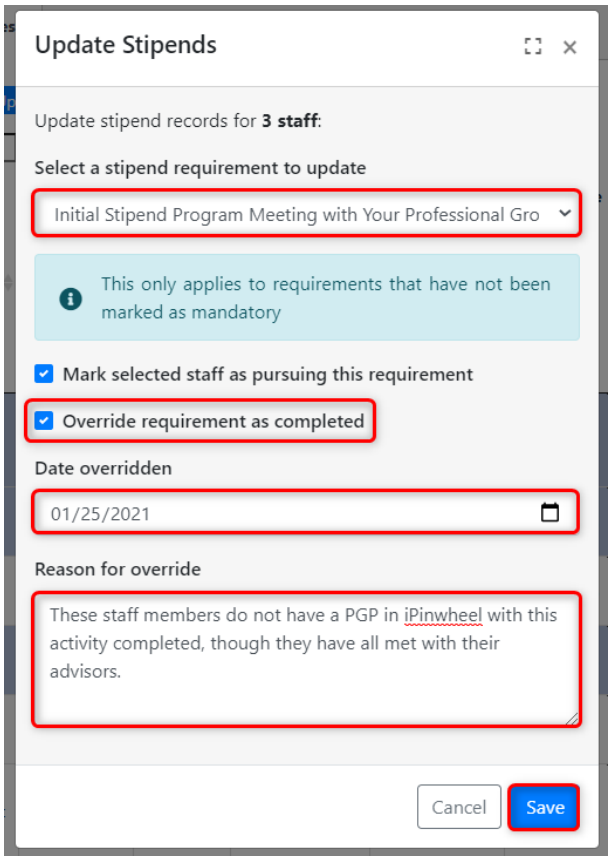
Option B- Multiple Staff Members: You can also override a requirement for multiple staff members at one time by selecting the staff members within the grid and then clicking the blue “Update Selected Staff” button at the top of the tab.



3 **Option A- One Staff Member:** In the modal that appears, select the “Override requirement as completed” checkbox, enter the date you are overriding it, and then provide a reason (*optional*). Then click “Save.”

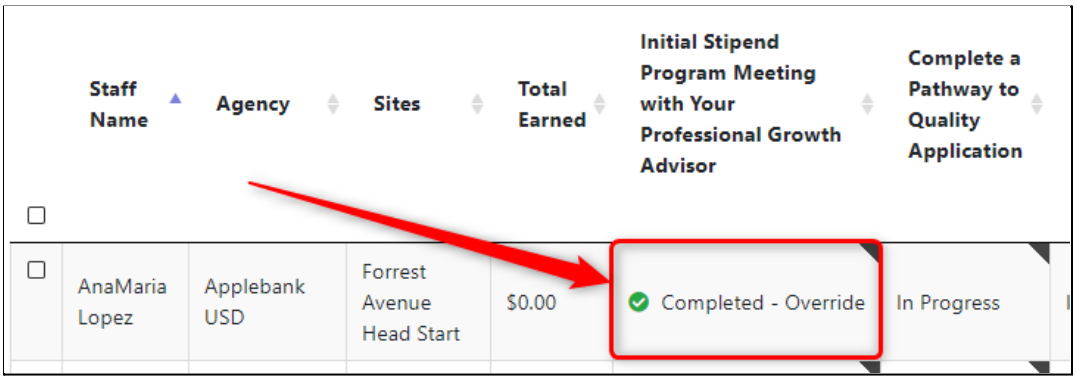


Option B- Multiple Staff Members: In the modal that appears, select the requirement you'd like to update from the list of requirements for this stipend program. Then select the "Override requirement as completed" field, enter the date, and click "Save."



Note: The "Mark Selected staff as pursuing this requirement" field will be automatically selected since marking the requirement as "Completed" implies the staff member has pursued that requirement.

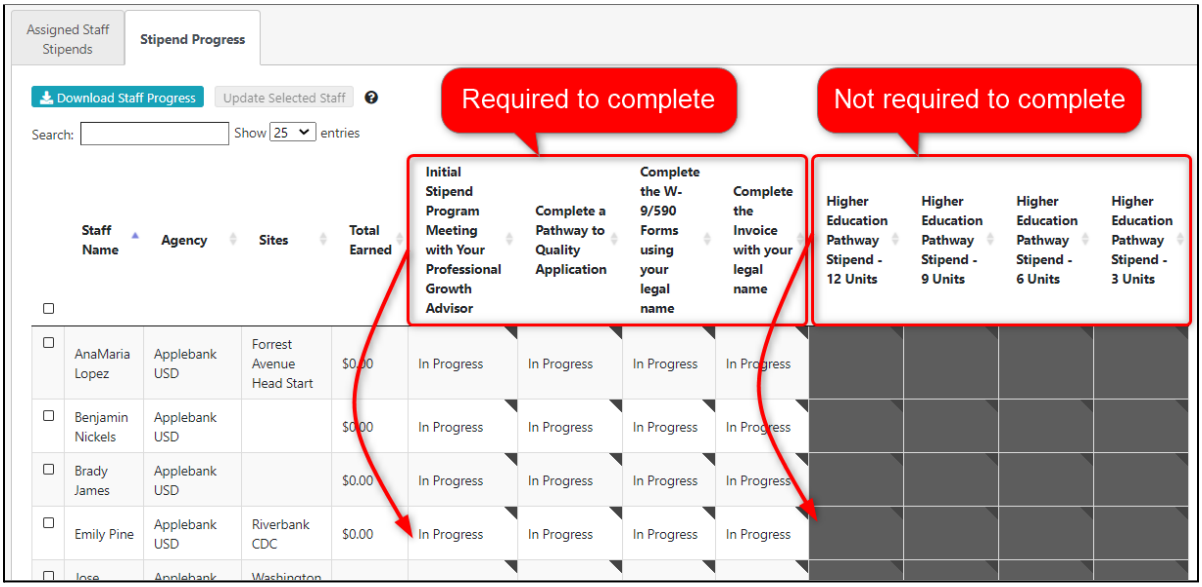
4 The requirement field for the staff member you have updated will then display a green checkmark and a tag that reads "override" to indicate that this requirement has been marked completed in an override action. If there is monetary compensation associated with completing the requirement, it will be displayed beside the green checkmark.



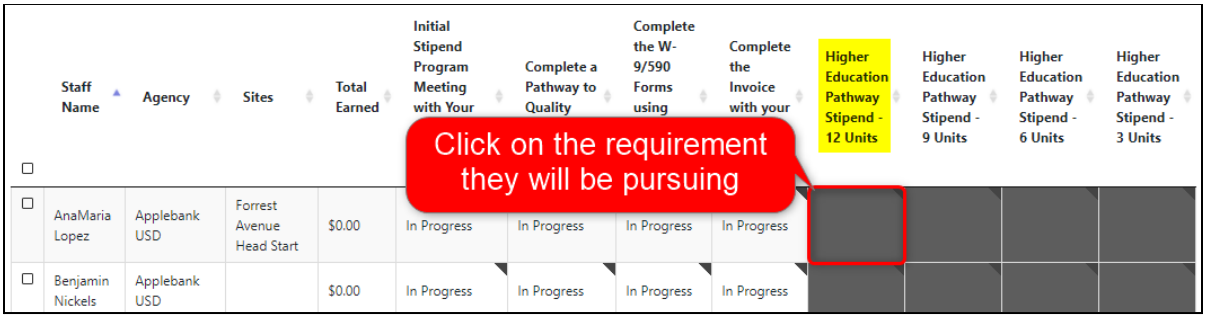
To learn how to override requirements from within a staff record, please refer to the instruction sheet titled, "Managing Stipends in the Staff Record."

Often in stipend programs, you will see requirements that only require one of its following actions, such as one of the many courses listed with varying unit totals. In these cases, you can indicate which requirements each staff member is pursuing and which ones they are not pursuing, such as a specific course from the list. This helps to more accurately allocate the stipend's budget by indicating which requirements the staff member is pursuing and will be paid for and inversely, indicating which requirements a staff member is NOT pursuing and thus will NOT be paid for.

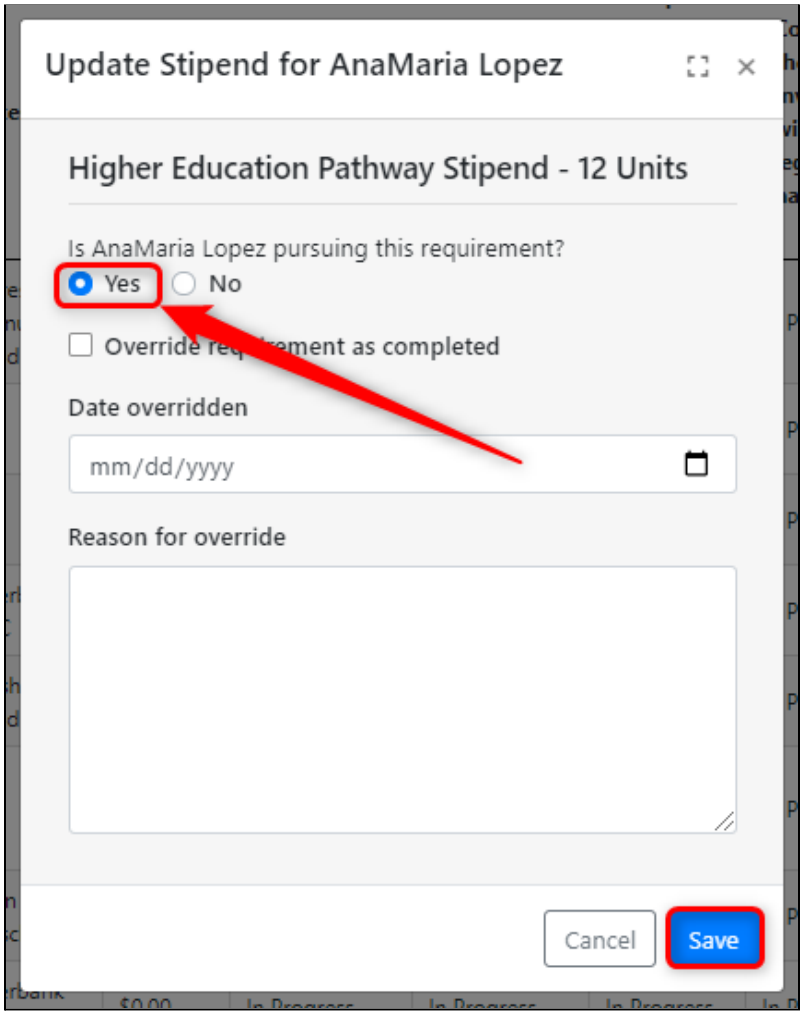
When you first enter the "Stipend Progress" tab, all required requirements will be defaulted to "pursuing" for each staff member, displaying an "In Progress" status in each staff's field for that requirement. All requirements that are part of a rule that doesn't require completion, such as a "complete one of the following" or "optional" rules, will be defaulted to "not pursuing" indicated by a grey box in the field. You will have to mark each requirement that a staff member is pursuing in the stipend track to accurately reflect the stipend's allocated budget.



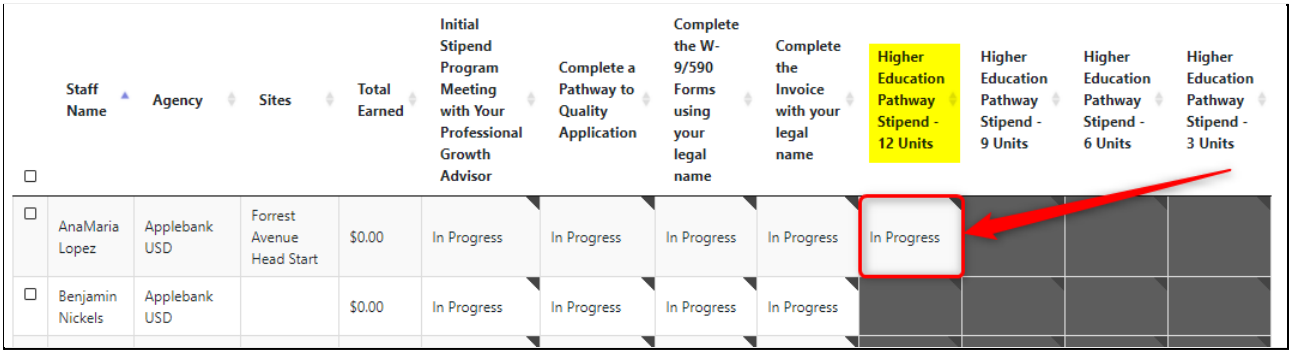
1 In the stipend track example here, participants have the choice of completing a 3 Unit, 6 Unit, 9 Unit, or 12 Unit course -- of which they are only required to complete one to complete the stipend. We will want to un-block/indicate which course each participant is pursuing to accurately allocate the stipend's budget, such as Ana Maria only pursuing a 12 unit course. In your case, click on the box for whichever requirement your staff member will be pursuing.



2 In the modal that appears, select “Yes” under “Is [Staff Name] pursuing this requirement?” Then click “Save.”

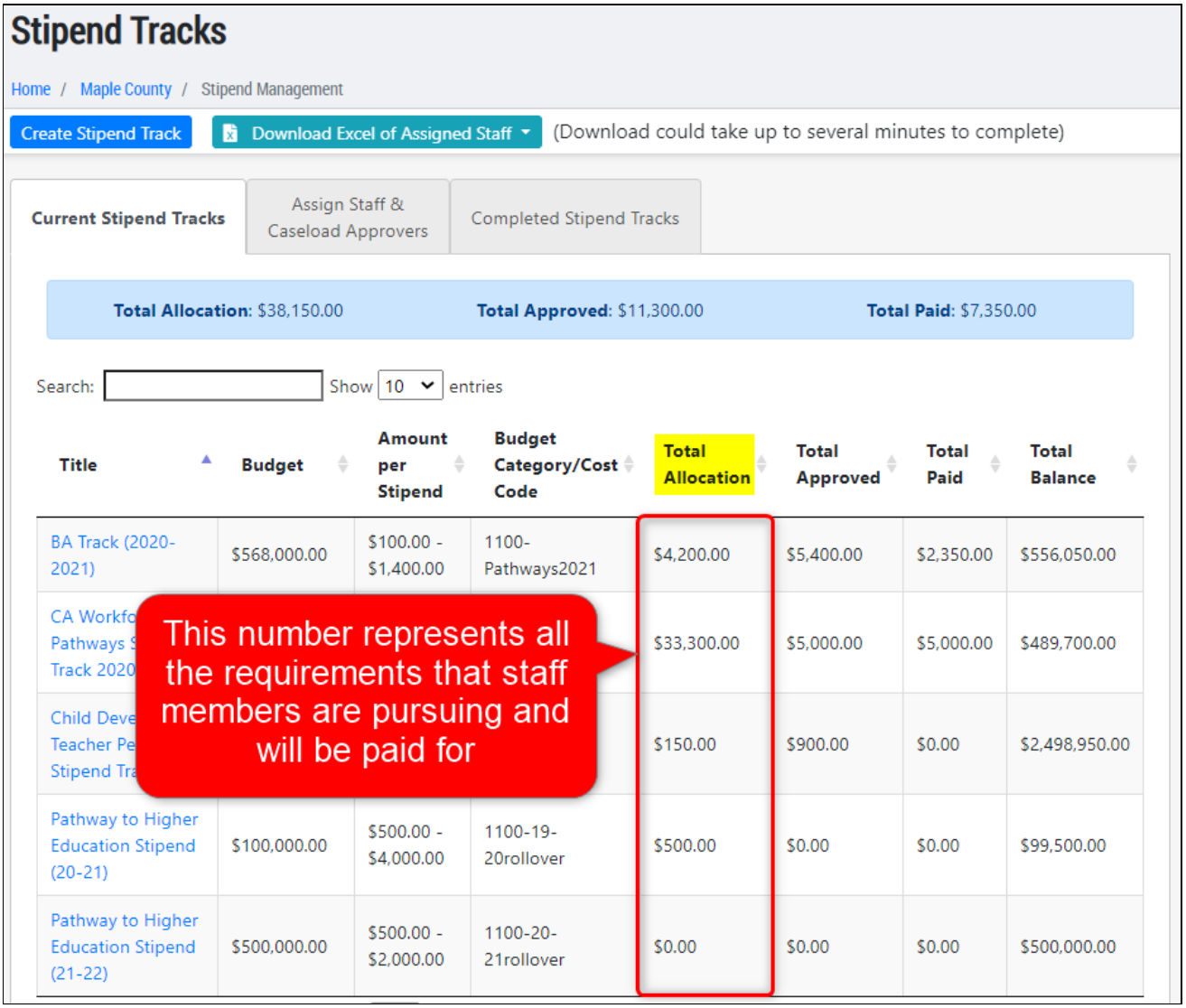


3 The requirement will then display an “In Progress” status, indicating that they will be pursuing the requirement. Repeat steps 1-2 for each requirement you would like to “un-block” for each staff member. Note that a “blocked” requirement does not inhibit the staff member from completing the requirement, but only serves to provide a more accurate portrayal of budget allocations and can be changed at any time.



Staff Name	Agency	Sites	Total Earned	Initial Stipend Program Meeting with Your Professional Growth Advisor	Complete a Pathway to Quality Application	Complete the W-9/590 Forms using your legal name	Complete the Invoice with your legal name	Higher Education Pathway Stipend - 12 Units	Higher Education Pathway Stipend - 9 Units	Higher Education Pathway Stipend - 6 Units	Higher Education Pathway Stipend - 3 Units
AnaMaria Lopez	Applebank USD	Forrest Avenue Head Start	$0.00	In Progress	In Progress	In Progress	In Progress	In Progress			
Benjamin Nickels	Applebank USD		$0.00	In Progress	In Progress	In Progress	In Progress				

This information will be used to estimate the budget allocation on the “Stipend Management” page. The dollar amount displayed in that grid will represent all of the requirements that you have indicated the staff members are pursuing, and excluding the requirements that you have indicated the staff members will NOT be pursuing.



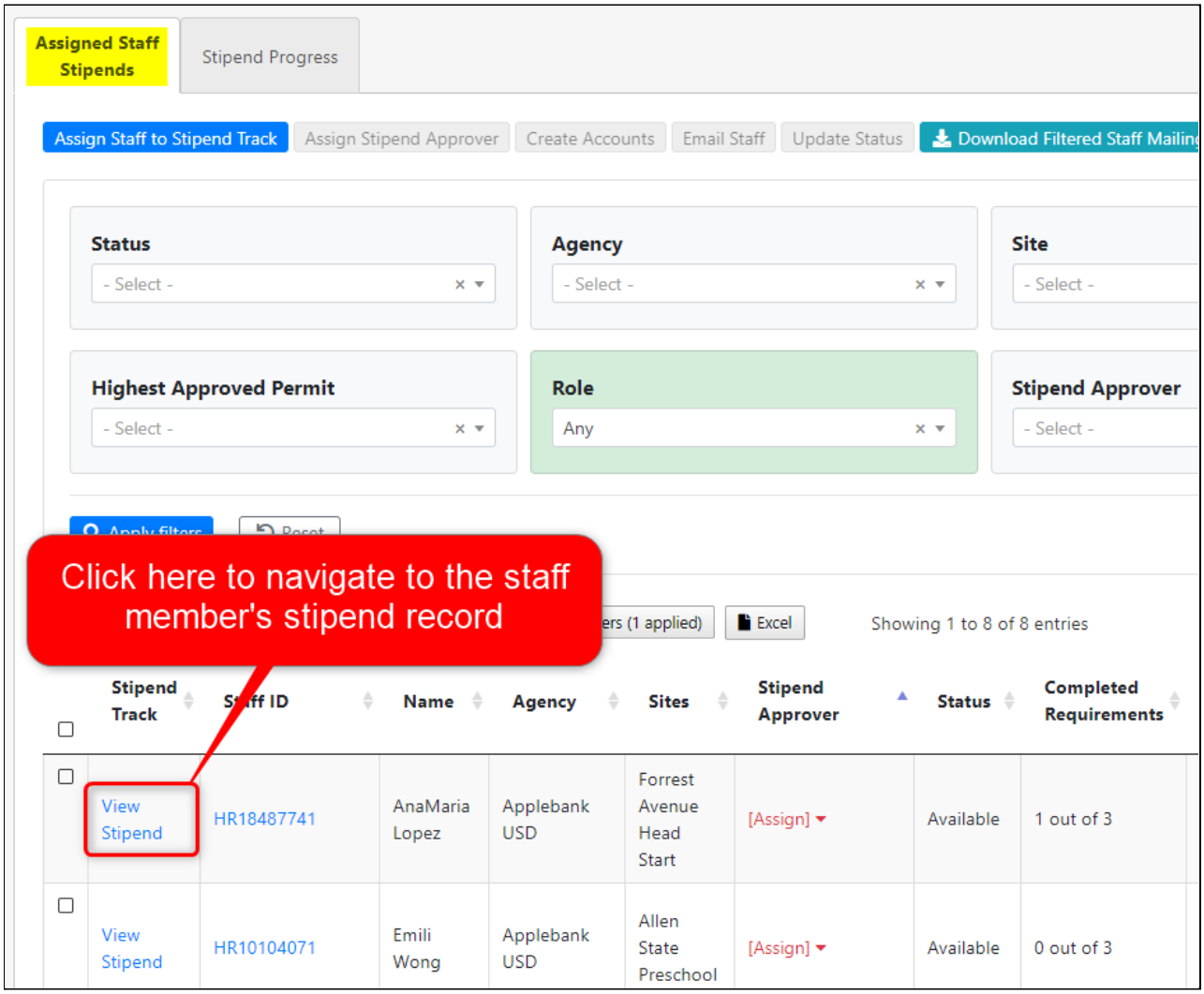
Title	Budget	Amount per Stipend	Budget Category/Cost Code	Total Allocation	Total Approved	Total Paid	Total Balance
BA Track (2020-2021)	$568,000.00	$100.00 - $1,400.00	1100-Pathways2021	$4,200.00	$5,400.00	$2,350.00	$556,050.00
CA Workfo Pathways S Track 2020				$33,300.00	$5,000.00	$5,000.00	$489,700.00
Child Deve Teacher Pe Stipend Tra				$150.00	$900.00	$0.00	$2,498,950.00
Pathway to Higher Education Stipend (20-21)	$100,000.00	$500.00 - $4,000.00	1100-19-20rollover	$500.00	$0.00	$0.00	$99,500.00
Pathway to Higher Education Stipend (21-22)	$500,000.00	$500.00 - $2,000.00	1100-20-21rollover	$0.00	$0.00	$0.00	$500,000.00

Workshops Requirements

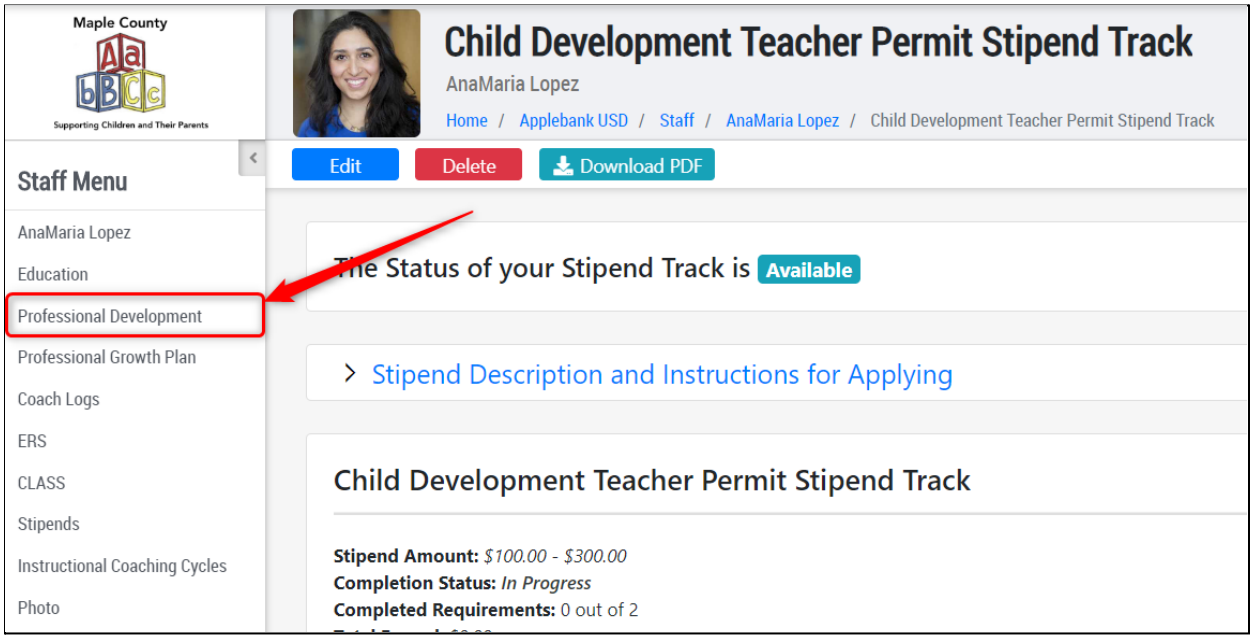
If there is a workshop listed as a stipend requirement in a stipend track, that requirement will automatically be marked as “Completed” in the “Stipend Progress” tab upon entering that workshop in the staff member’s record. There are two ways in which you can enter a workshop for a staff member that will share data with the stipend requirement, both described below.

1 The first way that you can automatically satisfy a workshop requirement using data from other parts of the HUBBE platform is by creating a Professional Development workshop event in the staff member’s record.

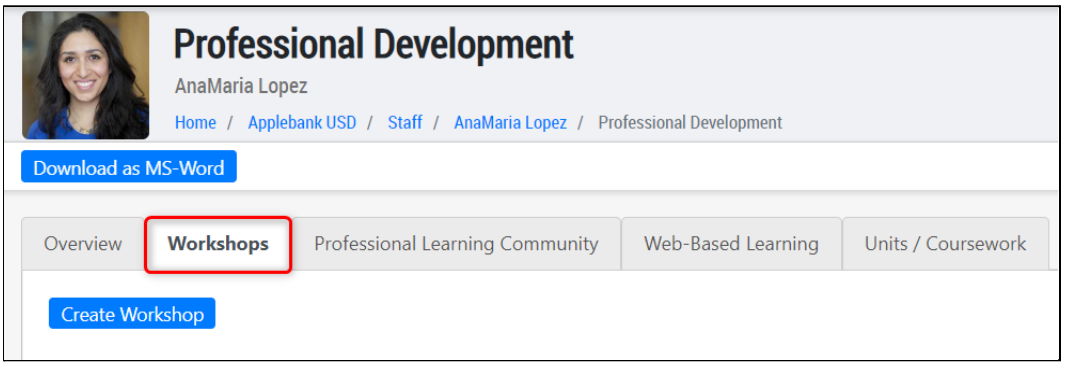
First, click on “View Stipend” next to the staff member for whom you’d like to enter a workshop event in the “Assigned Staff Stipends” tab on the Stipend Track page.



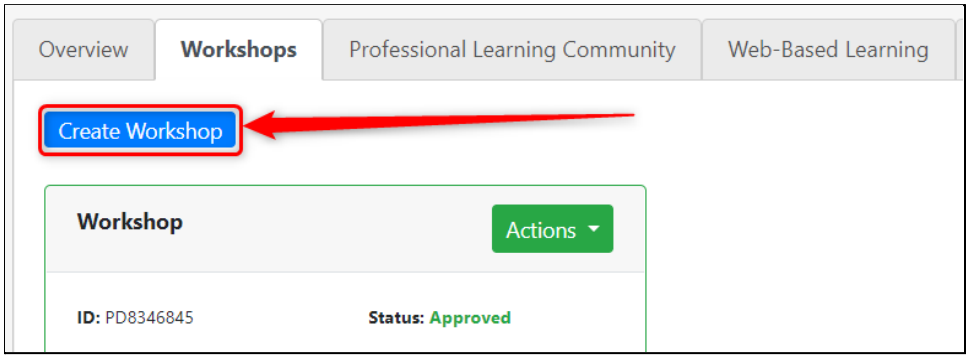
2 You will be led to the staff member's record on the view page of their assigned stipend. Click "Professional Development" in the Staff Menu.



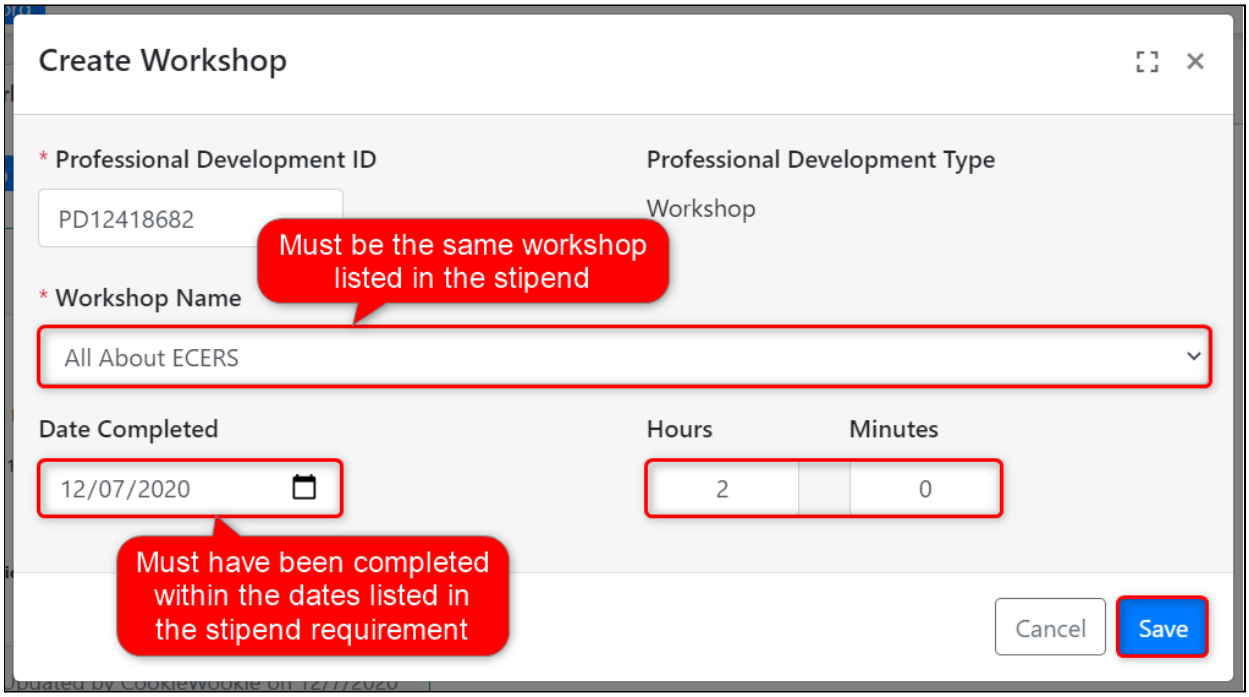
3 On the "Professional Development" page, navigate to the "Workshops" tab.



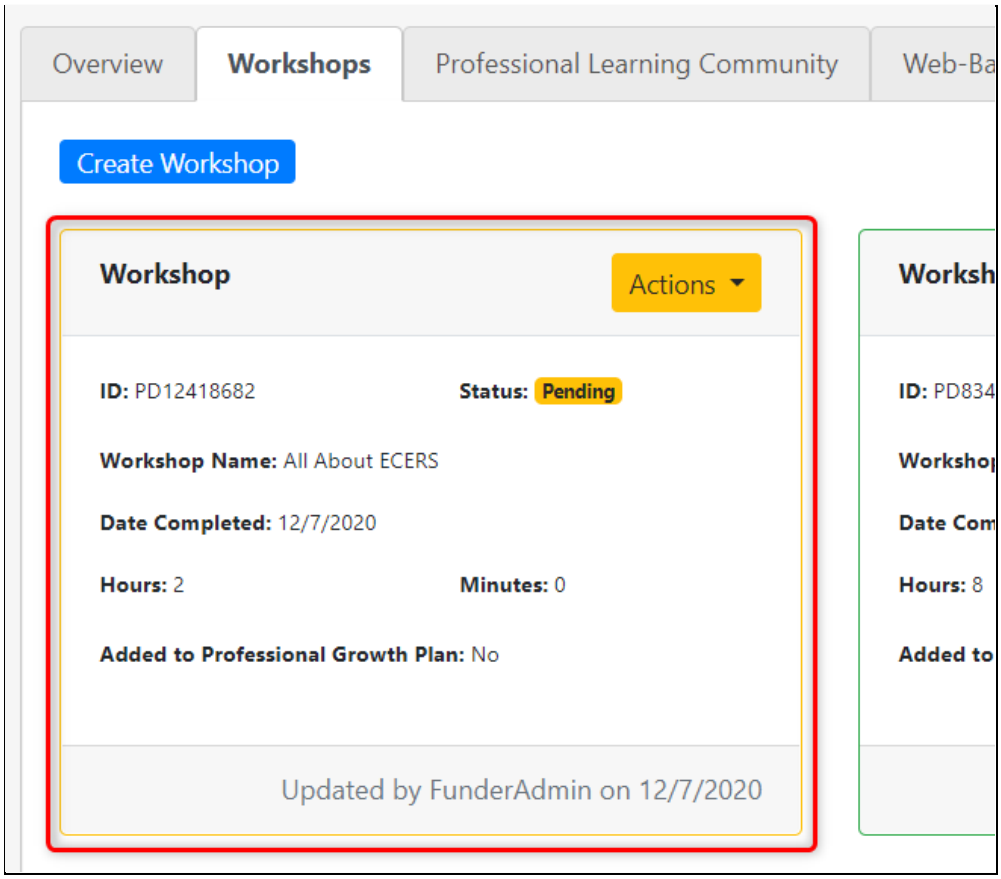
4 Click "Create Workshop" to enter a new workshop record for the staff member that matches the one listed in the stipend requirement. **<u>Please note that you must enter the same workshop listed as a stipend requirement, meaning the title must be exactly the same.</u>**



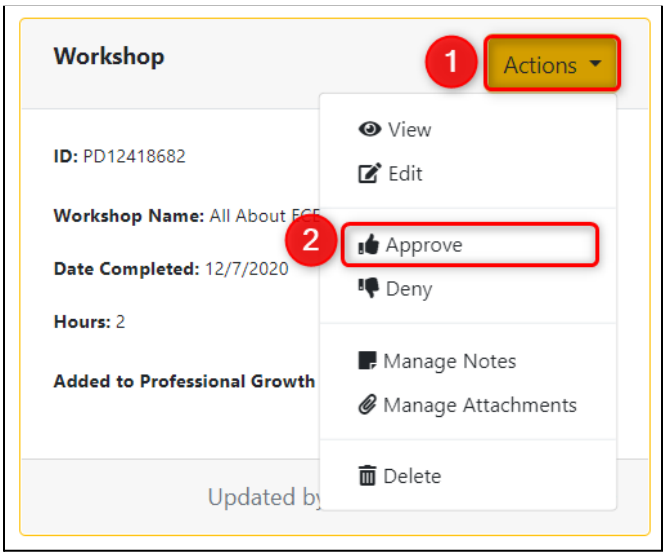
5 In the modal that appears, we recommend you leave the ID as is, select the workshop name, select the date completed, and enter the number of hours spent in the workshop. Then click “Save.” **Please note that the workshop title must match the one listed in the stipend exactly. The “Date Completed” must allow fall within the dates the stipend is available.**



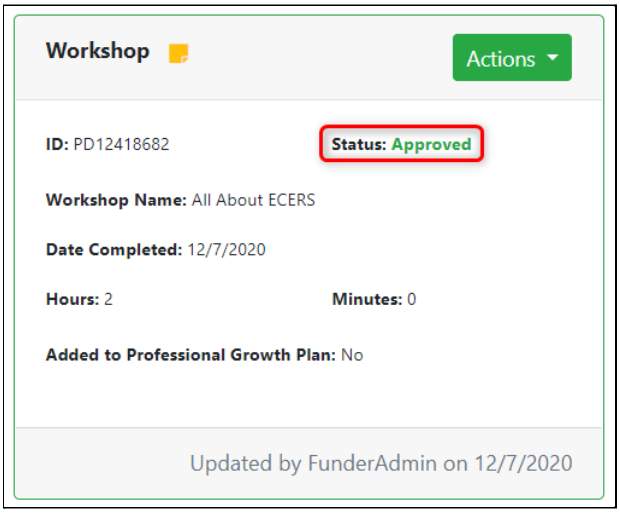
You will then notice the workshop even listed in the “Workshops” tab.



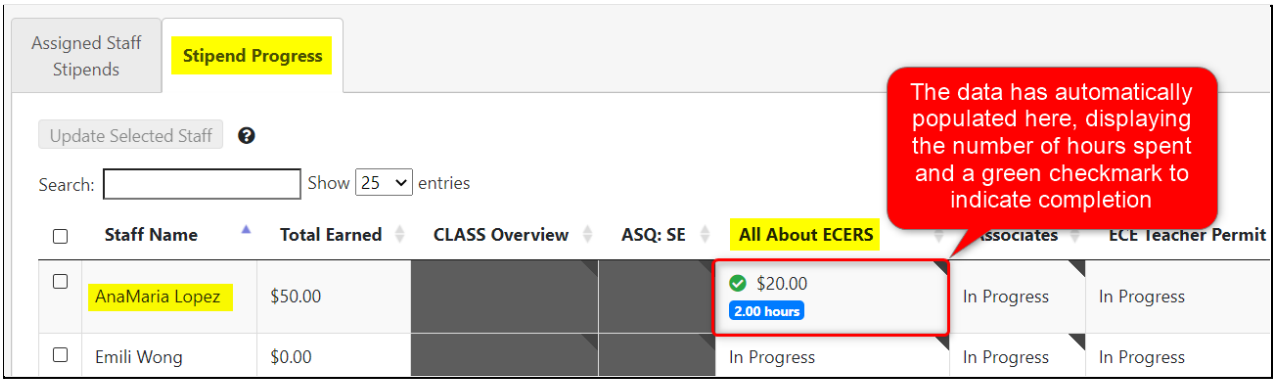
6 In order for the workshop to be marked “Completed” within the stipend track, it must be Approved. Click the “Actions” button within the workshop tile and then click “Approve” in the drop-down menu.



You will then notice the workshop tile turn to green and the status will be “Approved.”

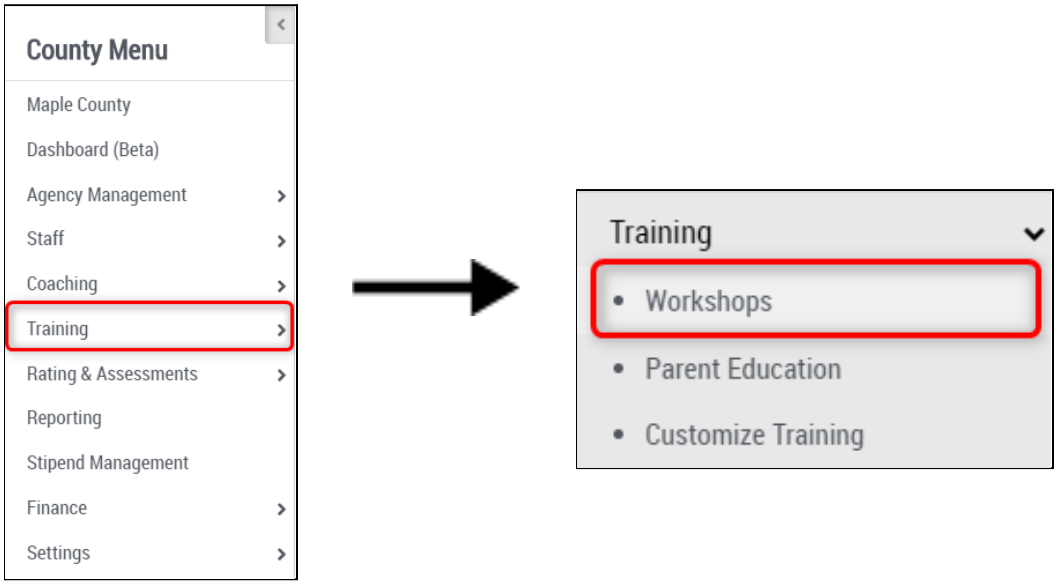


7 Back in the stipend track, you will then notice the workshop requirement will be marked as “Completed” for the staff member, displaying the total number of hours spent in the workshop and the total earned.

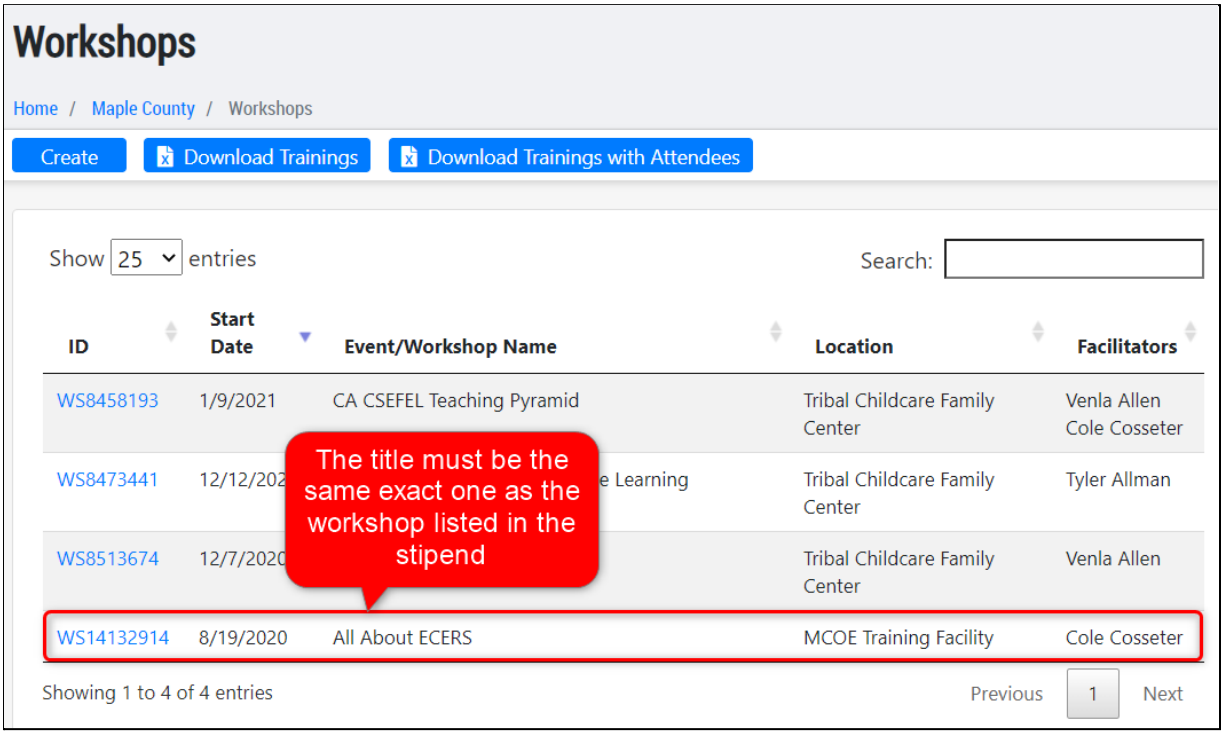


The other way that you can enter a workshop for a staff member that will automatically data share with the stipend and mark the requirement as completed is by marking the staff member as an attendee in the “Workshop” record.

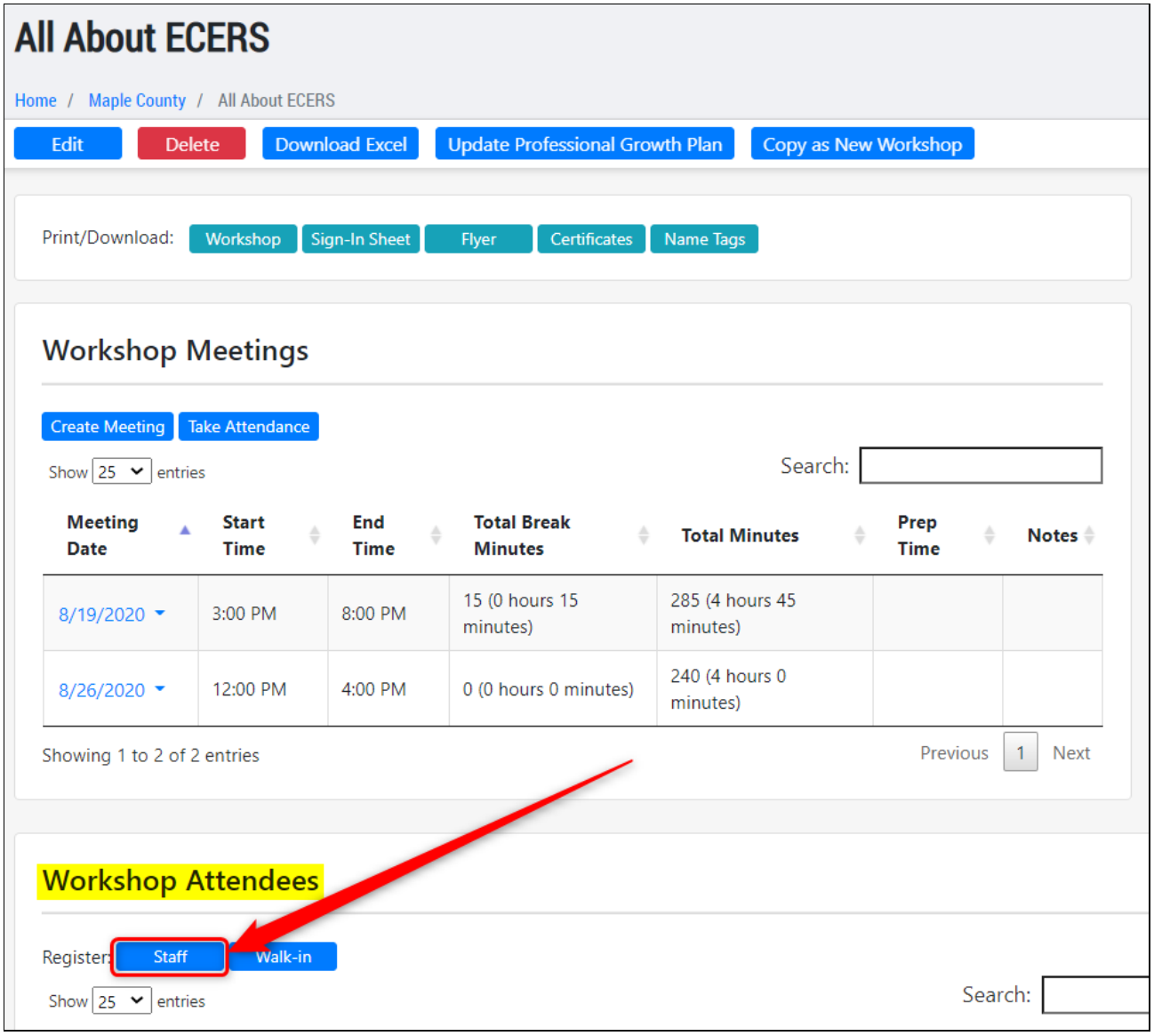
1 First navigate to the Workshops record by clicking “Training” in the County Menu, and then selecting “Workshops” in the drop-down menu.



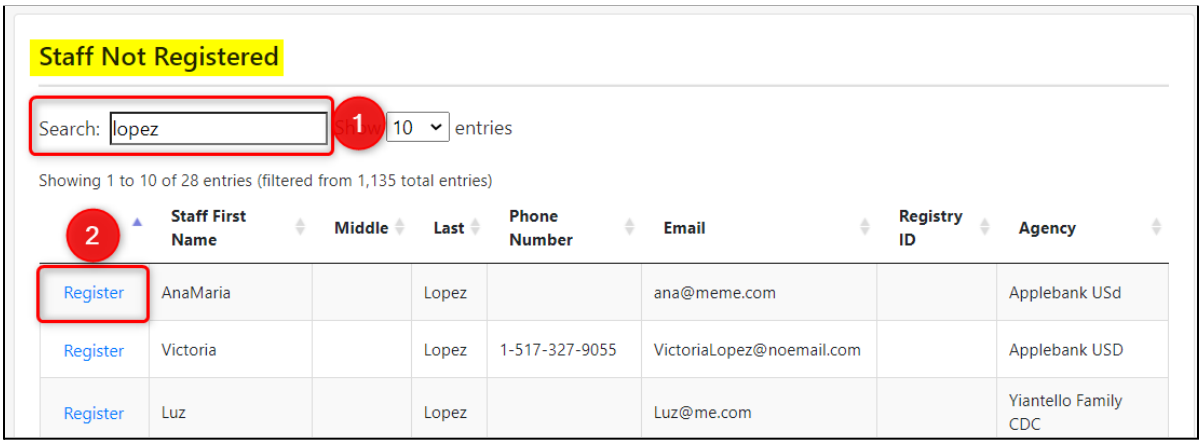
2 Select the workshop in the grid. **<u>Please note that you must select the same workshop listed as a stipend requirement, meaning the title must be exactly the same.</u>**



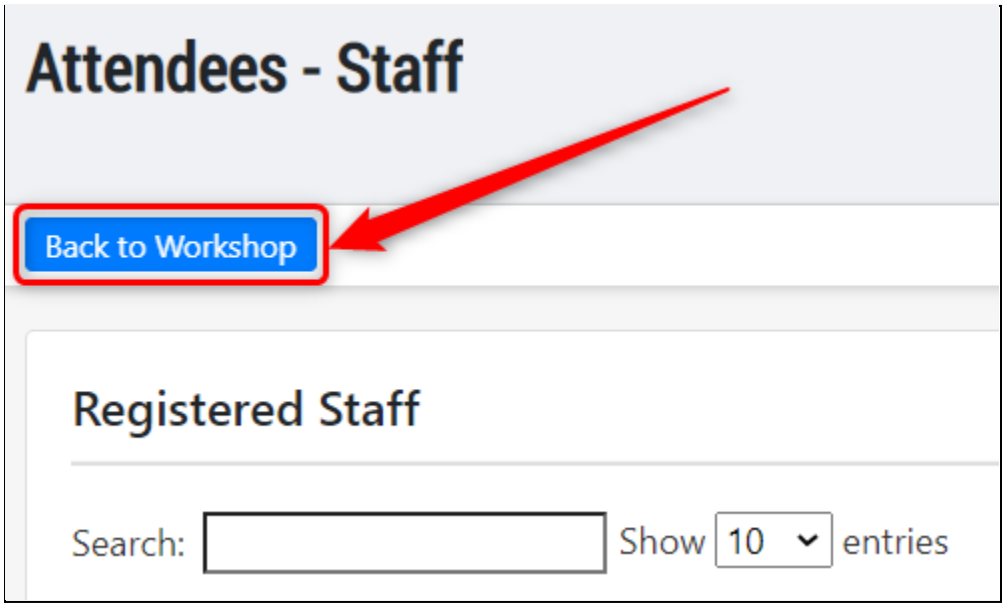
3 Within the workshop page, click the blue “Staff” button in the “Workshop Attendees” card.



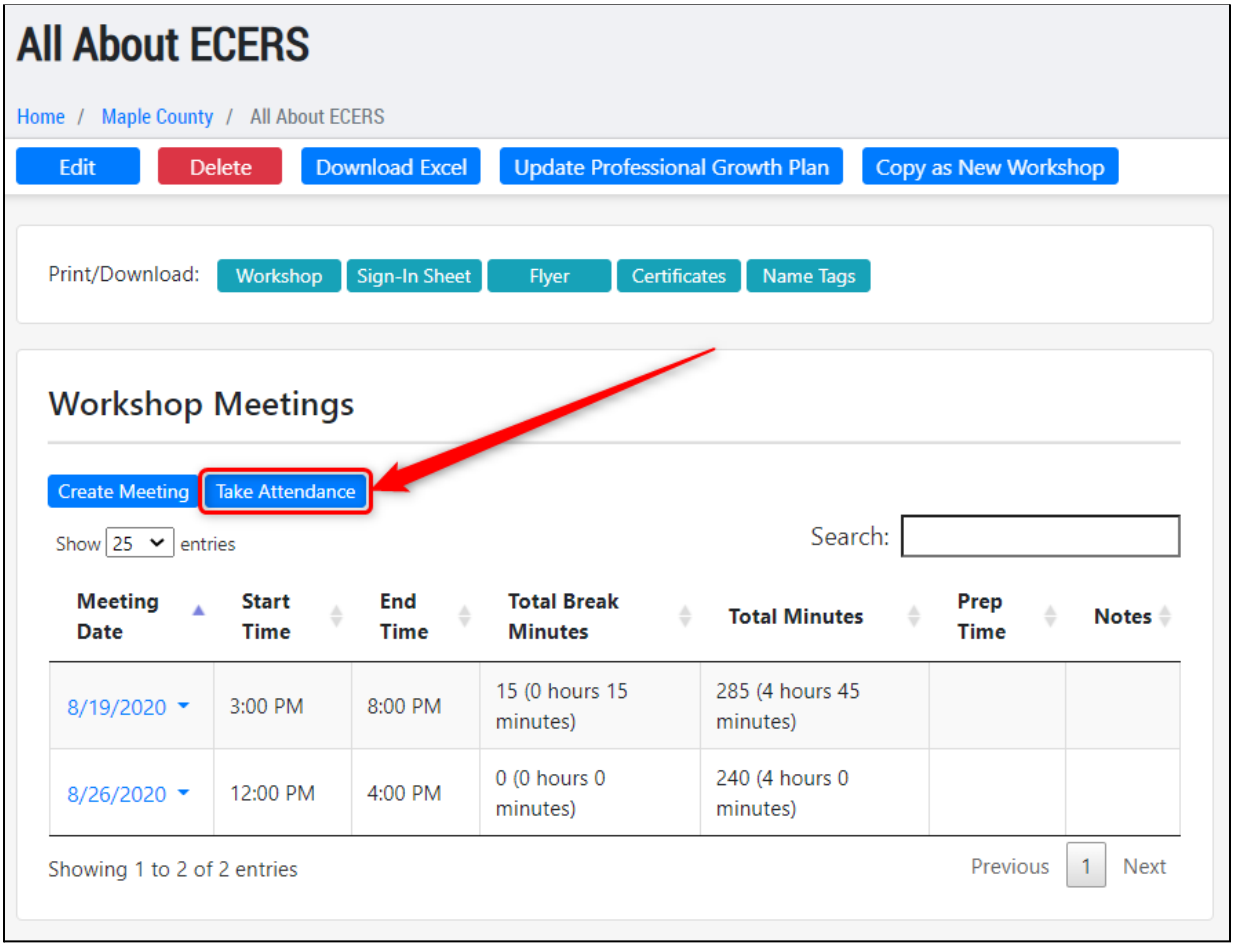
4 In the “Staff not Registered” grid, use the search field to easily locate the staff member. Then click “Register”next to the staff member's name. This will then remove the staff member from this grid and add them to the “Registered Staff” grid.



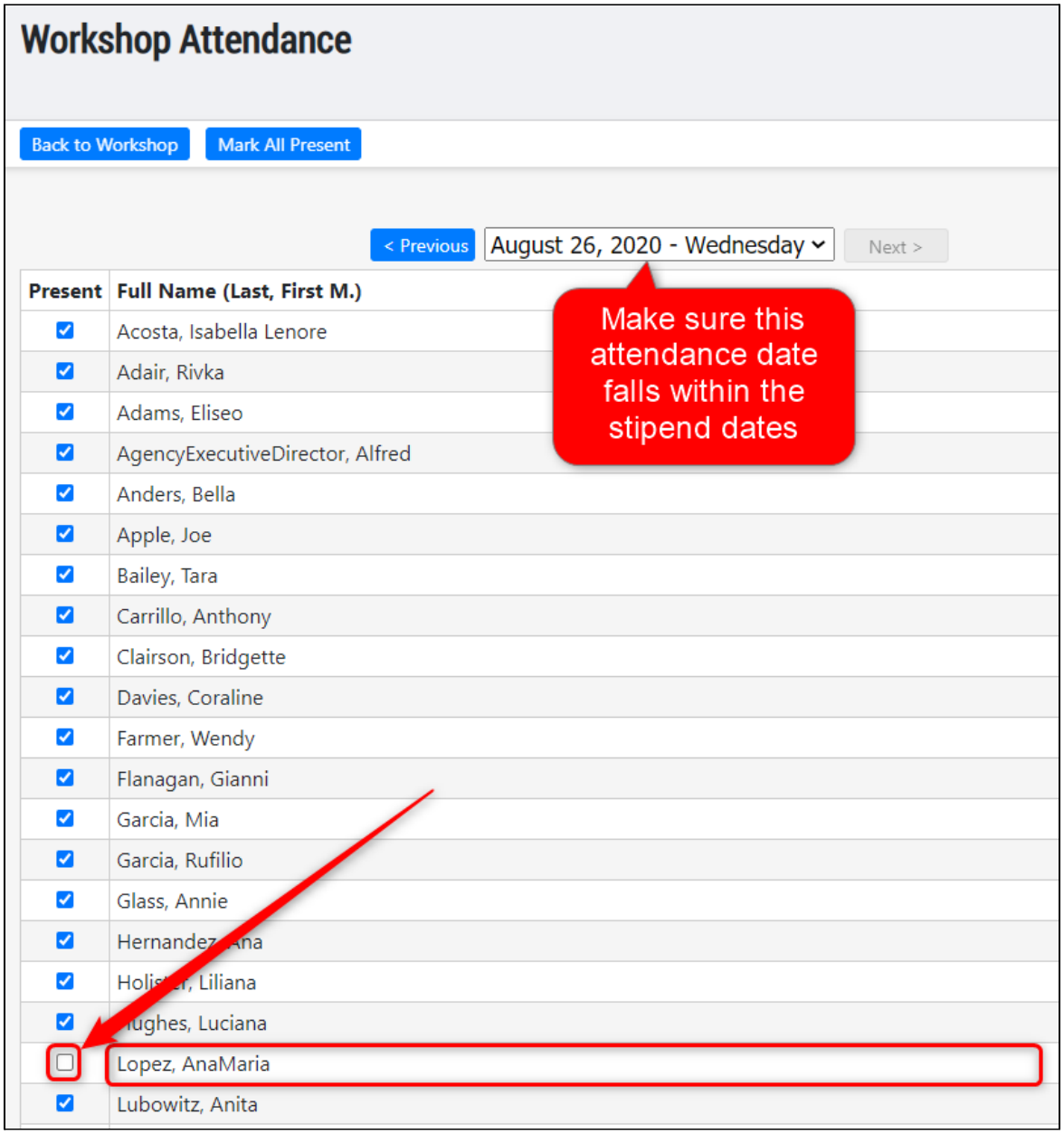
5 At the top of the page, click the blue “Back to Workshop” button.



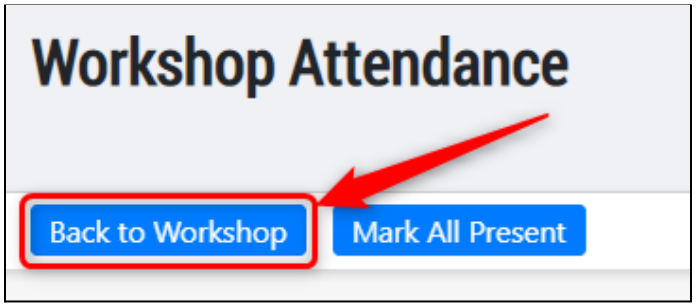
6 Then click the blue “Take Attendance” button in the “Workshop Meetings” card.



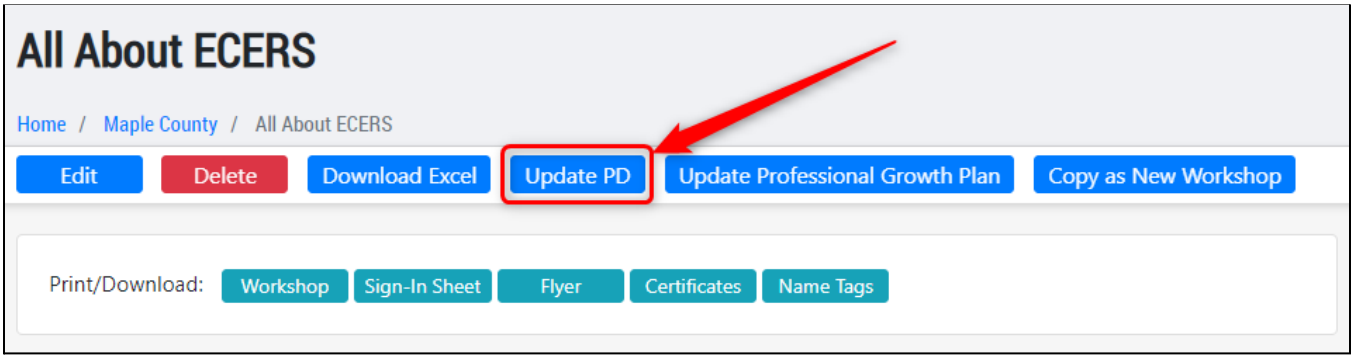
7 Click the checkbox next to the name of the staff member you have just added. Make sure that the date of attendance falls within the dates that the stipend is available for.



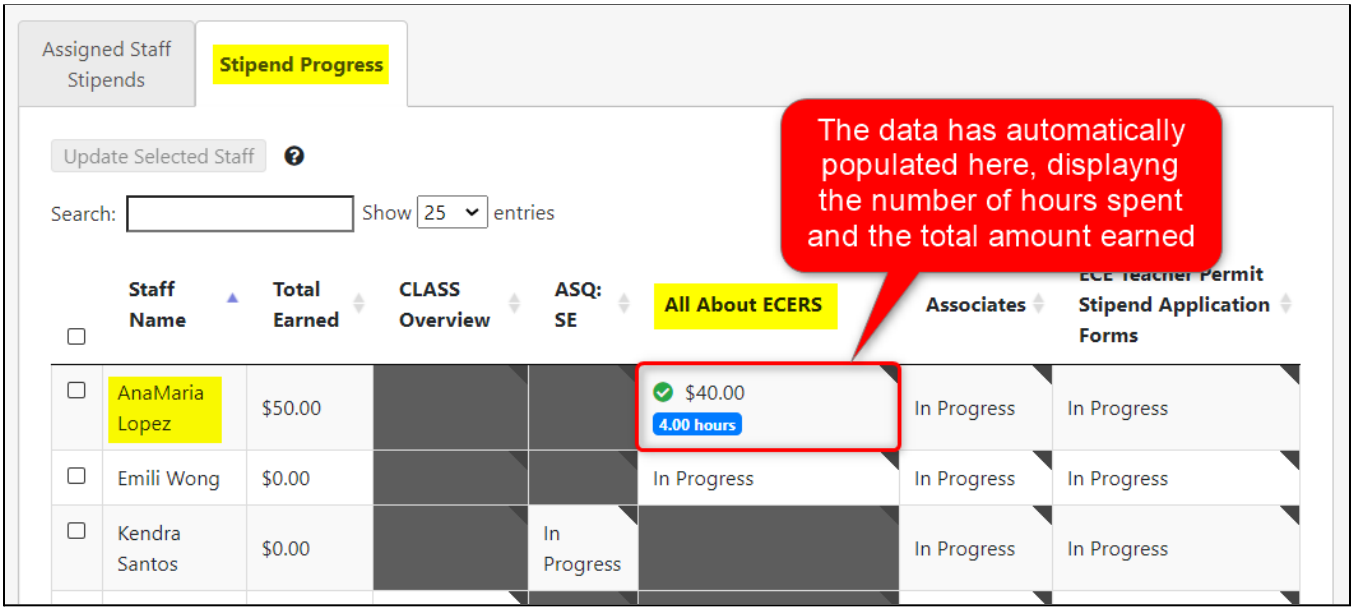
8 Once you have selected the staff member to mark them as present at the workshop, click “Back to Workshop” at the top of the page.



9 Back on the main view page of the workshop, click the blue “Update PD” button at the top of the page. This will add the Professional Development (PD) event to the staff member’s record.

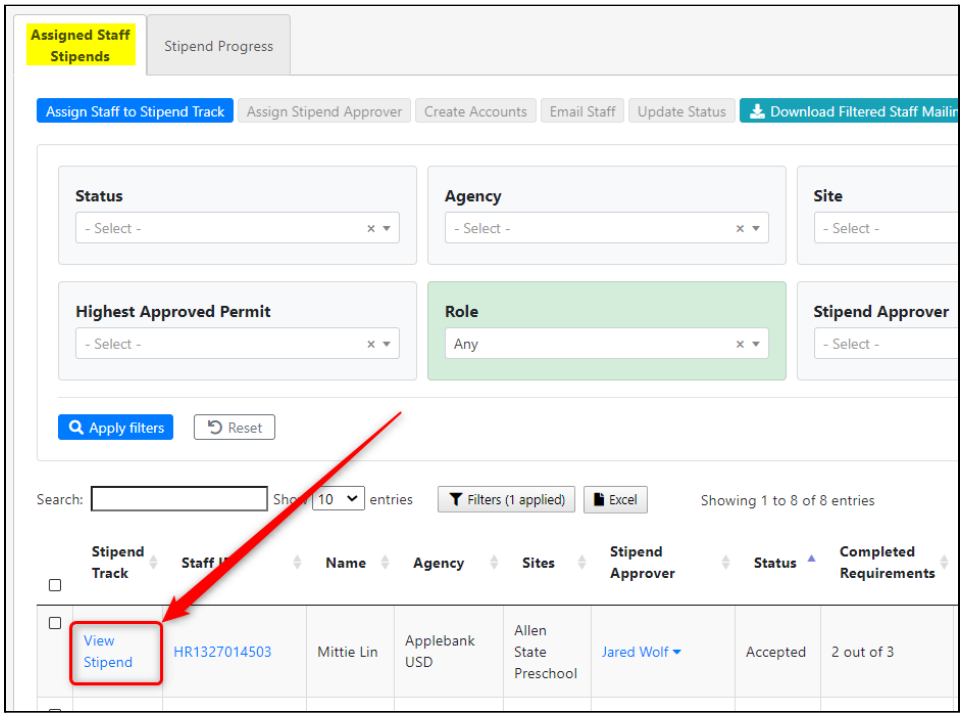


10 For our purposes here, this will then automatically populate the stipend requirement as “Completed” in the “Stipend Progress” tab within the stipend track for that staff member.

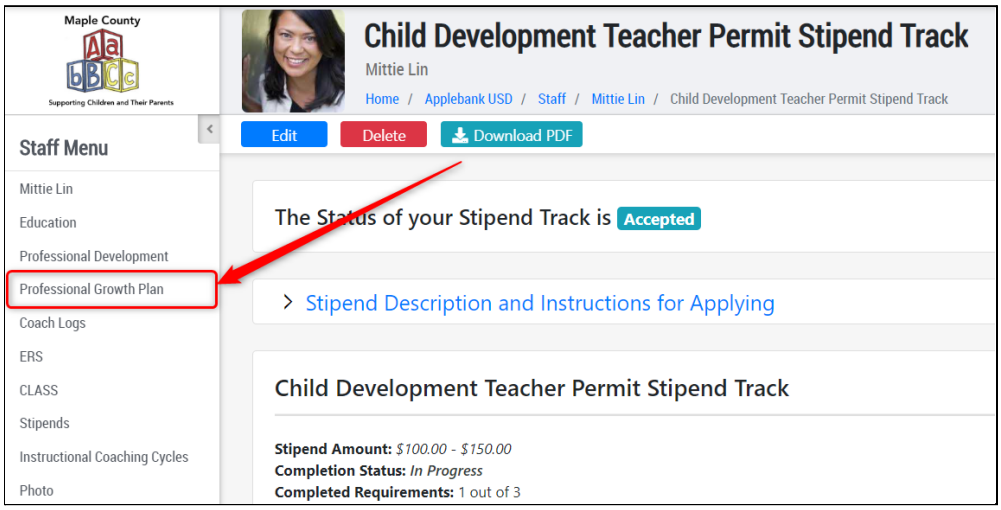


If there is a Professional Growth Activity listed as a stipend requirement in a stipend track, that requirement will automatically be marked as “Completed” in the “Stipend Progress” tab upon entering that Professional Growth Activity in the staff member’s record, as described below. For details and instructions on how to create Professional Growth Activity titles, please refer to the instruction sheet titled, “How to Customize Coaching.”

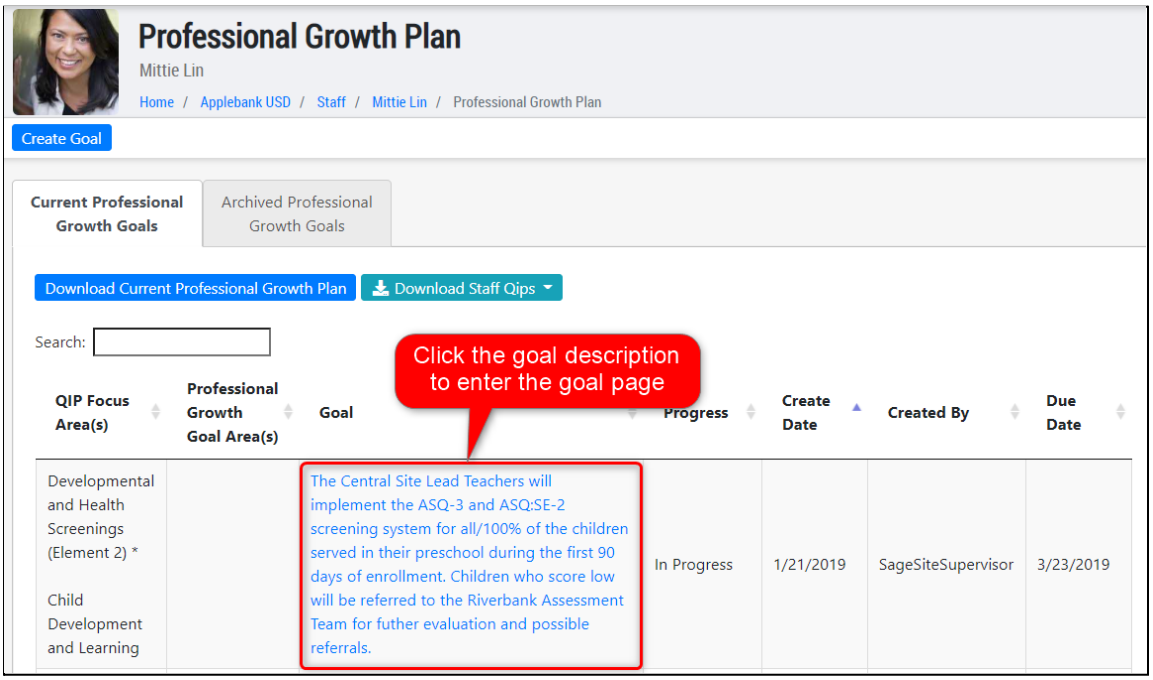
1 First click the “View Stipend” button next to the staff member for whom you’d like to add the professional growth activity in the “Assigned Staff Stipends” tab.

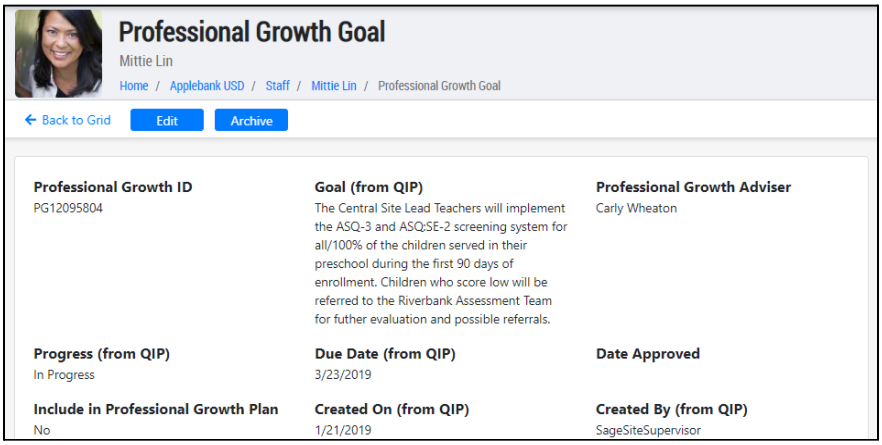


2 You will be led to the staff member’s record on the view page of their assigned stipend. Click “Professional Growth Plan” in the Staff Menu.

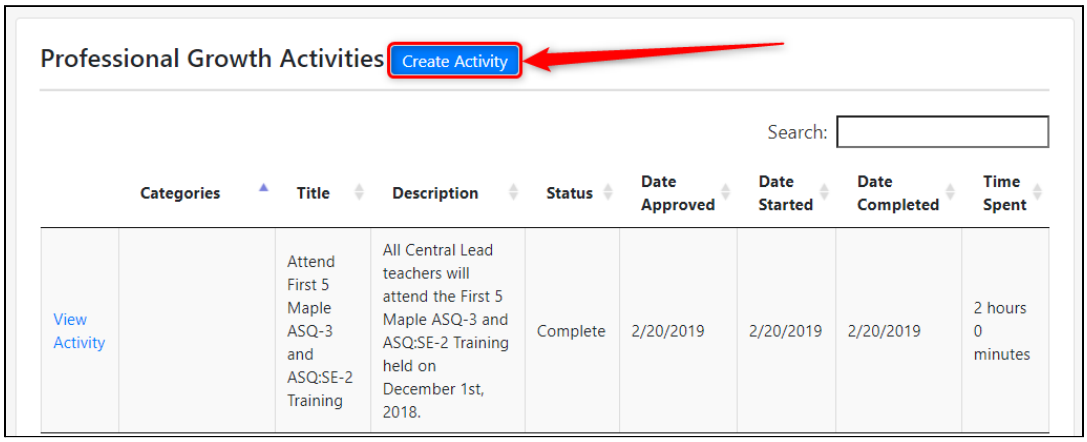


3 Within the staff member's "Professional Growth Plan" record, select the goal to which you would like to add the activity. You will be led to the view page of the PGP goal.

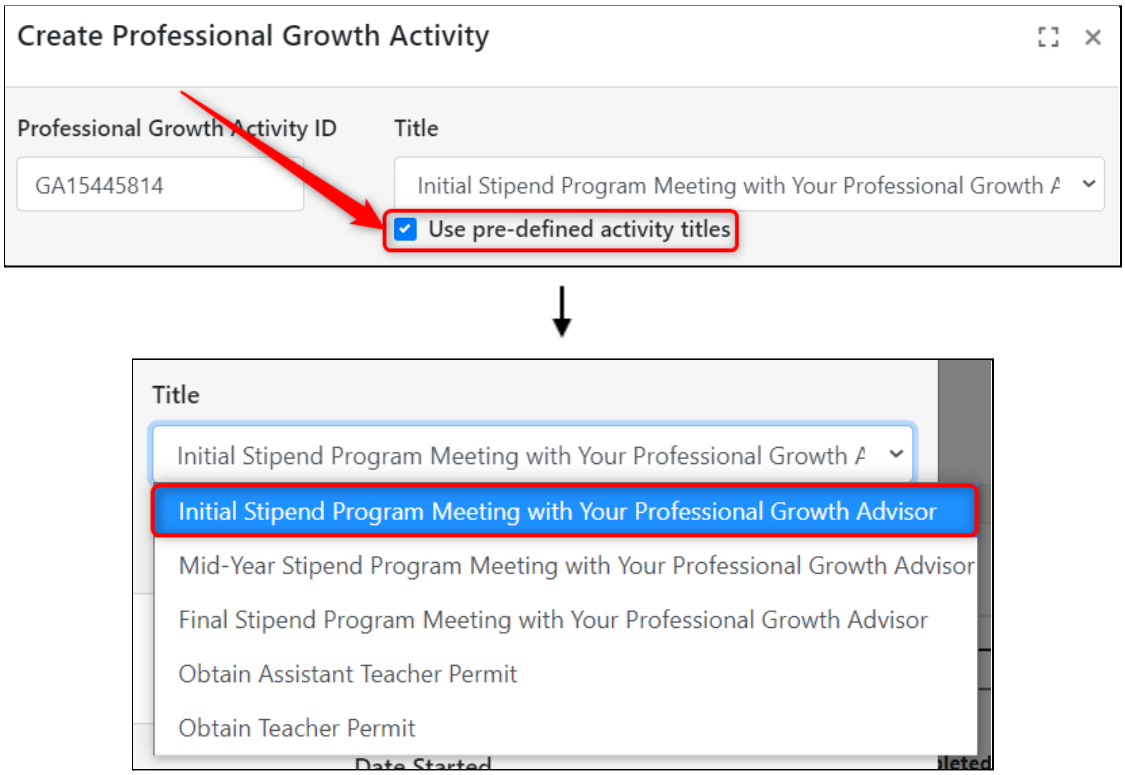




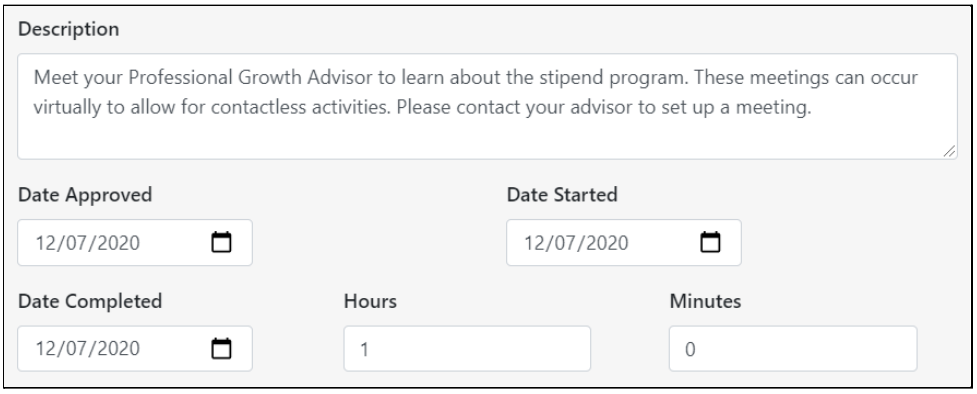
4 Click the blue "Create Activity" button in the "Professional Growth Activities" card.



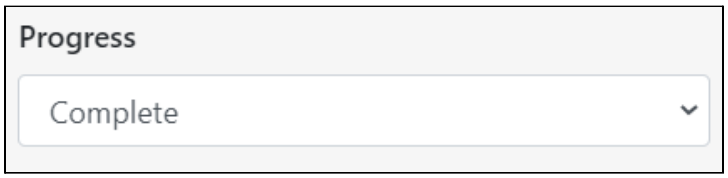
5 In the modal that appears, click the checkbox to enable the “Use pre-defined activity titles” preference. This will populate a list of your pre-defined activities, which you can select from in the drop-down menu. Select the activity that is listed as a stipend requirement. **Please note that you must select the same activity with the same title as listed in the stipend.**



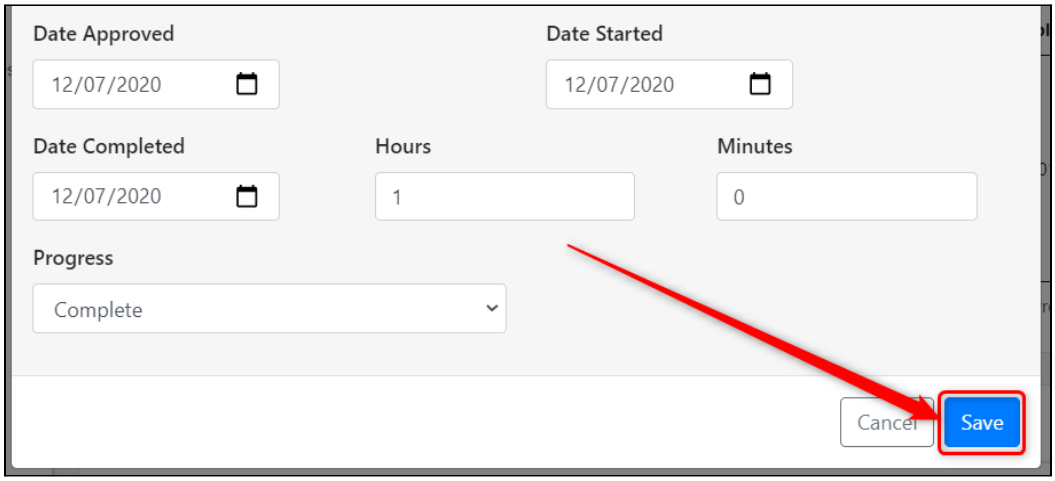
6 Complete the description, the date approved, the date started & completed, and the time spent on the activity. We recommend keeping the randomly generated ID as is.

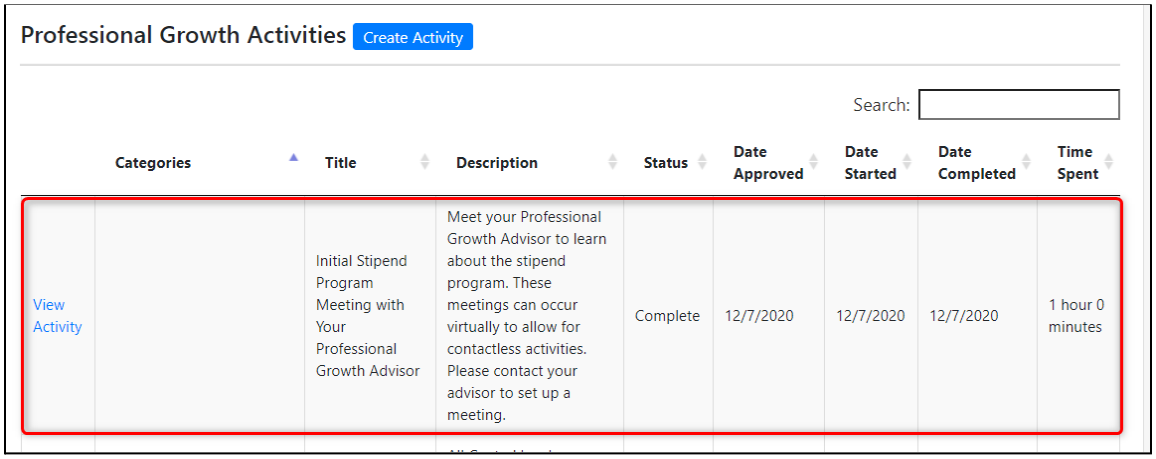


In order for the stipend requirement to be marked as completed in the stipend, you must select “Complete” as the “Progress” in the modal.

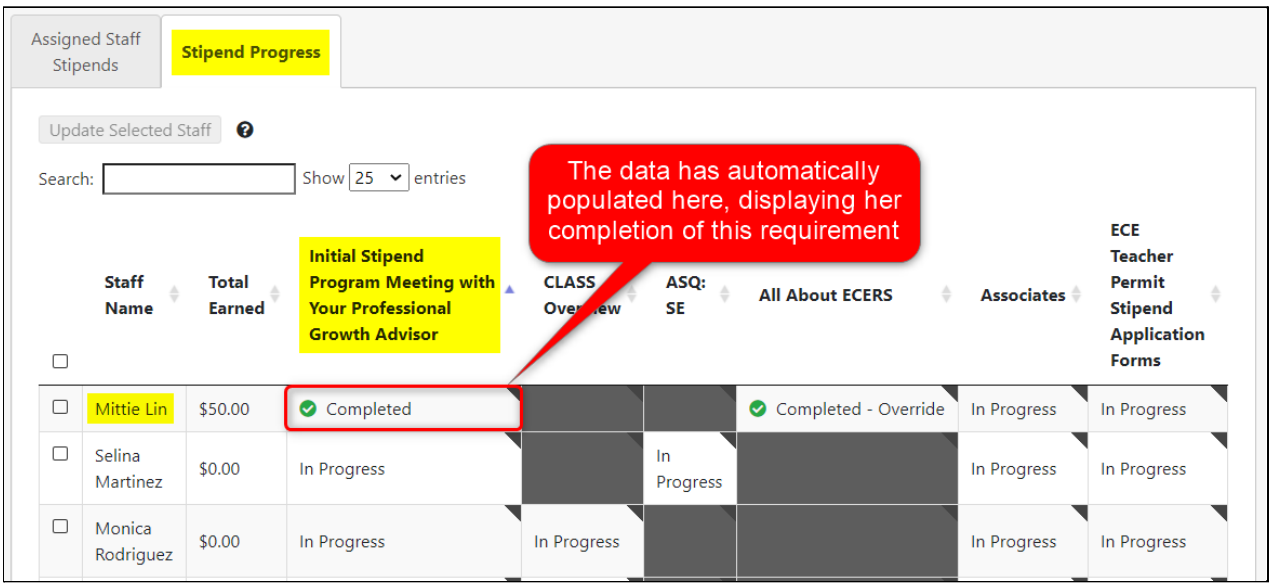


7 Once you are done, click “Save.” You will then notice the activity listed in the “Professional Growth Activities” card.





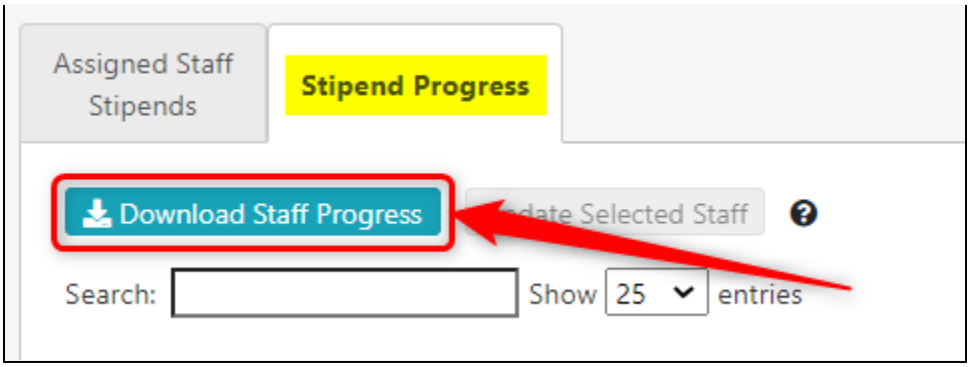
8 Back in the stipend track, you will then notice the Professional Growth Activity requirement will be marked as “Completed” for the staff member.



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 Appl
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