WRG Training Provider Portal Reference Guide

My Leads (informational tab)
This tab provides a record of each individual who has completed the NLJ website application and selected the institution as a potential training provider. This tab provides the training provider with similar information found in the *New Lead* email notification.

Provider Details (action tab)
This tab provides an inclusive list of all the training provider's WRG training programs. From this tab, training providers update student statuses. See below for step-by-step instructions on how to create and submit invoices and update student statuses. Local WorkOnes will now be enrolling and approving students.

Invoice Details (action tab)
This tab provides an inclusive list of all created invoices. From this tab, training providers may create and submit invoice, track the status of each invoice.

My Students (informational tab)
This tab provides details of all students in all programs. You can export this list out of the portal if needed.

Creating an Invoice
Students from different courses can now be on one invoice.
The first step in the invoice process is to create the invoice. To complete this task, follow these steps:

- Go to the *Invoice* tab
- Select Region (**only students from the same region can be on the same invoice**)
- Select Create Enrolled Invoice or Create Completed Invoice only.
- Select OK- there will be a message box that populates letting you know that invoice has been created. Also, the Create Enrolled or the Create Completed button will disappear depending on which one you choose.
- Created Invoice should appear at the top of the invoice list in "Draft" status.
- Click on the blue box under the Review column on the invoice you are working on.

Students that are eligible to be invoiced will appear here depending on if you are invoicing for Enrolled or Completed.

- **Select All-** This will mark all students on the list.
- **Clear All**- This will remove all students that were included on invoice.
- **Set Pending-** This will mark the students you selected to be set as pending and ready to be invoiced.
- **Put on Hold-** This will hold students off the current invoice that you are working on and will not be included once you submit.

Once you have selected what students to be set as pending, you can click on the back arrow to go to the previous screen with all invoices.

You will now click on the blue box under the Details column. On this screen it will auto default to Enrolled or Completed. If you scroll to the bottom you will see all students that you had set to pending.

- **Submit for Payment**- You will need to select Yes
- **Submit**- Click this button. This is the final step in submitting your invoice.

Be advised that once you submit an invoice, the Create Enrolled Invoice or the Create Completed Invoice button will not appear until that invoice is approved by the local WorkOne. Only one Enrolled and one Completed invoice can be submitted at a time.

- An *Enrolled* invoice should only include students who have begun training.
- A *Completed* invoice should only include students who have completed training.
- Students who *did not show* for their training can have their status updated from the student record. Steps to complete this can be found under the section within this document titled *Updating a Student Status*.
- A *dropped* student can have their status updated from the student record. Steps to complete this can be found under the section within this document titled *Updating a Student Status*.

To ensure the invoice was successfully submitted:

- Go to the *Invoices* tab
- Look for the Invoice number or sort by Status column.
- Review that the invoice is in a status of *Submitted*

Invoice Statuses:
Draft- Invoice generated by training provider but has not been submitted to DWD
Submitted- Invoice submitted by the training provider to DWD
Signed- DWD WRG staff have approved the invoice
Paid- DWD Fiscal has approved and issued the invoice for payment

Updating a Student Status

Student records may be placed in several statuses. Please complete the steps following the status to which you wish to update the student record.
Enrolled- The student record is updated to this status at the time of the student record creation by the local WorkOne from the Leads email.
Approved- The local WorkOne will set this status once all information is correct.
Training- The student record is automatically updated to this status when the student record is placed on an *Enrolled* invoice and the invoice status is *Signed.* Follow the steps under the section.
Did Not Start- The student status can be updated to *did not start* through the student record by the training provider. ***This status will be updated by the DWD Workforce Programs and Services team if the student is not invoiced within 45 days from the start date of the class.**

1. From the *Provider Details* tab, select the program course the student was enrolled in.
2. Find the student record in the *Students* section.
3. To the far right of the student record, select the dropdown arrow and click edit.
4. Update the *Student Status*.
5. Click Update

Completed- The student record is automatically updated to this status when the student record is placed on a *Completed* invoice and the invoice status is *Signed.* Follow the steps under the section.

Dropped- The student status can be updated to *dropped* through the student record. ***This status will be updated by the DWD Workforce Programs and Services team if the student is not invoiced within 45 days from the end date of the course**

6. From the *Provider Details* tab, select the program course the student was enrolled in.
7. Find the student record in the *Students* section.
8. To the far right of the student record, select the dropdown arrow and click edit.
9. Update the *Student Status*.
10. Click Update

Earned Credential (this is not a status but a student record update)**- *This is the training providers responsibility to update this field.**

- Go to the *Provider Details* tab
- Select the course the student attended
- Scroll down to the *Students* section
- Locate the student whose record needs to be updated
- To the far right, click the dropdown arrow and select Edit
- Scroll to the *Certificate Earned* field
- Select one of the following- *Yes, No, Did not Pass, or Did not attempt*
- Select Update