

Instructions for Entering Participant Budgets and Payments in Arizona Job Connection

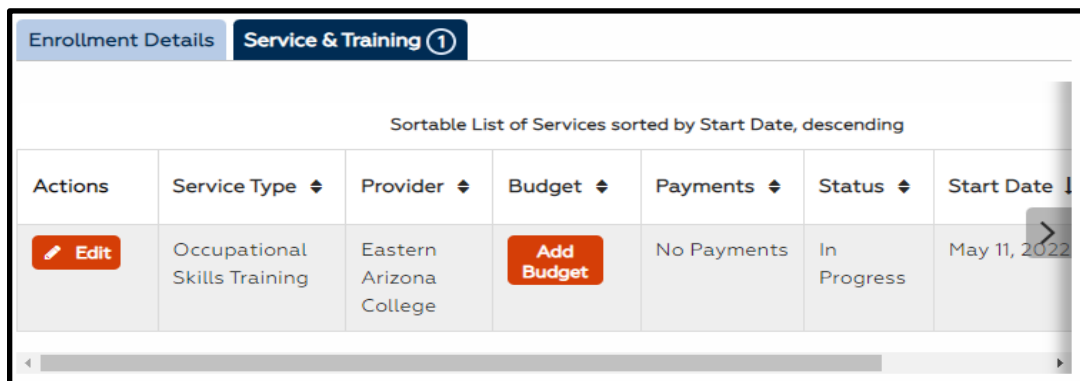
Purpose: To describe the steps for Adult, Dislocated Worker, or Youth program staff to enter and approve a participant's individual training account budget and payments through the Arizona Job Connection (AJC) system.

Note: Although budgets and payments related to expenditures such as supportive services and incentives paid on behalf of or to a participant may be entered in AJC, the instructions in this document pertain to eligible training program expenditures.

Background: States are required to report eligible training provider (ETP) performance information to the U.S. Department of Labor annually. The performance report includes the "average cost-per-participant for participants who received training services" from ETP (20 C.F.R. § 677.230).

Entering Participant Budgets in AJC

1. Search for and open Job Seeker's AJC Profile.
2. Navigate to the Service & Training (S&T) plan.
3. Locate the service the budget will be added to and select Add Budget.



The screenshot shows the 'Service & Training' tab in the AJC system. It displays a 'Sortable List of Services sorted by Start Date, descending'. The table has columns for Actions, Service Type, Provider, Budget, Payments, Status, and Start Date. A row is visible for 'Occupational Skills Training' provided by 'Eastern Arizona College', with a status of 'In Progress' and a start date of 'May 11, 2022'. An 'Add Budget' button is highlighted in the Budget column for this service.

Actions	Service Type	Provider	Budget	Payments	Status	Start Date
Edit	Occupational Skills Training	Eastern Arizona College	Add Budget	No Payments	In Progress	May 11, 2022

4. The Add Vendor to Service page allows staff to do the following:
 - a. Tie the budget to a vendor in the AJC system by entering vendor information in the appropriate search fields and clicking Search. Selecting a vendor pulls up a list of expenditure categories that are valid for the budget.
 - b. Pull a list of expenditure categories that are valid for the budget by selecting Create a Job Seeker Budget.

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ADD VENDOR TO SERVICE

i If payment for this budget is to be tied to a specific Vendor, search for the Vendor below, otherwise click "Job Seeker Budget" button to tie to the Job Seeker for payment.

Vendor ID

Name

Business Name

FEIN

First few letters of city

ZIP

Search Clear

Note: Both options (connecting the budget to a specific vendor or creating one for a job seeker) will allow AJC to connect the budget and payments to the ETP.

5. On the Expenditure Category Selection page, mark the appropriate expenditure categories to be included in the budget and select Continue.

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EXPENDITURE CATEGORY SELECTION



Please choose which expenditure categories should appear on this budget.

Expenditure Categories:

- Audit
- Books
- Drug Screen/Background Check
- Incentives
- Materials & Supplies
- Needs Related Payments
- Other Expenses
- Program Oversight and Monitoring
- Supportive Services - Child/Dependent Care
- Supportive Services - Emergency
- Supportive Services - Transportation
- Tuition & Fees
- Work Clothing, Equipment & Tools

6. Complete the Budget Contract Spreadsheet (additional information under subsections a to d below) and select Save.

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BUDGET CONTRACT SPREADSHEET

Job Seeker:	Tom Pseudo, Participant ID: 3008785
Primary Case Manager:	[REDACTED]
Enrollment:	Adult (Local Formula)
Training/Service	Occupational Skills Training
O*NET Code Title:	Medical Assistants 31-9092.00

Quick-Reference Budget Name: (required)

Job Seeker: 3008785 budget for service #

Program Year 1 (YYYY)

	PY 1	PY 2	PY 3	Sum	Rate	PO Number	Comments
Books	0.00	0.00	0.00	0.00			
Materials & Supplies	0.00	0.00	0.00	0.00			
Other Expenses	0.00	0.00	0.00	0.00			
Supportive Services - Transportation	0.00	0.00	0.00	0.00			
Tuition & Fees	0.00	0.00	0.00	0.00			
Work Clothing, Equipment & Tools	0.00	0.00	0.00	0.00			
Obligated Totals	0.00	0.00	0.00	0.00			
Expended Totals	0.0	0.0	0.0	0.00			
Remaining Totals	0.00	0.00	0.00	0.00			

Save

Reset

Cancel Budget Entry

Edit Categories

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- a. The Quick-Reference Budget Name is a free text field for naming the budget and may be useful if multiple budgets exist with similar details. Staff may determine how to label this field.

Quick-Reference Budget Name: (required)

- b. In the Program Year 1 (YYYY) field, enter the program year in which the training starts (or started).

Program Year 1 (YYYY)

- c. Budget amounts for PY2 may not be entered without entering PY1 budget amounts first. PY3 budget amounts may not be entered before entering budget amounts for prior program years.

	PY 1	PY 2	PY 3	Sum
Books	0.00	0.00	0.00	0.00
Materials & Supplies	0.00	0.00	0.00	0.00
Other Expenses	0.00	0.00	0.00	0.00

- d. Rate, PO Number, and Comments are optional. Note that information may not be entered in these fields without first entering the budget amounts for the applicable PY.

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Rate	PO Number	Comments


7. Select Confirm if all information added to the Budget Contract Spreadsheet is correct. If not, select Cancel.

ATTENTION

Warning: Changes will be made to the budget. If this is not acceptable click "Cancel" to disregard the changes, otherwise click "Confirm" to save the changes.

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BUDGET CONTRACT

 The budget was added/edited successfully. The following table outlines the current budget.

Description	PY 2021	PY 2022	PY 2023
Work Clothing, Equipment & Tools	\$150.50	\$0.00	\$0.00
Supportive Services - Transportation	\$100.00	\$0.00	\$0.00
Other Expenses	\$50.00	\$0.00	\$0.00
Materials & Supplies	\$50.00	\$0.00	\$0.00
Books	\$400.00	\$0.00	\$0.00
Tuition & Fees	\$2,750.00	\$0.00	\$0.00

[Service List](#) [New Service Budget](#) [Budget Payment](#) [Back to Service & Training](#)

Approving the Budget (Staff with Regional Director Role in AJC)

1. Go to Fiscal, then Review Pending Budgets.
2. From the list, select the budget to be approved.

Note: Designated staff with Regional Director roles in AJC will need to approve pending budgets before payments can be made.

Adding Payments

1. Locate the service for which the payment will be made and select Add Payments.

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Enrollment Details		Service & Training ①				
Sortable List of Services sorted by Start Date, descending						
Actions	Service Type	Provider	Budget	Payments	Status	Start Date
Edit	Occupational Skills Training	Eastern Arizona College	BSS FAV	Add Payments	In Progress	May 11, 2021

2. Select the appropriate payment category (e.g., Tuition & Fees).

The page layout will slightly differ depending on whether the budget is tied to a specific vendor (refer to step 4 on pages 1 and 2).

- a. Vendor-associated view:

SELECT PAYMENT CATEGORY		
Please select a budgeted category to be included in this payment.		
Vendor Name	PY/FY	Budgeted Category
Eastern Arizona College	2021	Books
Eastern Arizona College	2021	Materials & Supplies
Eastern Arizona College	2021	Other Expenses
Eastern Arizona College	2021	Supportive Services - Transportation
Eastern Arizona College	2021	Tuition & Fees
Eastern Arizona College	2021	Work Clothing, Equipment & Tools

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b. Client Budget view:

Vendor Name	PY/FY	Budgeted Category
Client Budget	2021	Tuition & Fees
Client Budget	2021	Books
Client Budget	2021	Materials & Supplies
Client Budget	2021	Other Expenses
Client Budget	2021	Supportive Services - Transportation
Client Budget	2021	Work Clothing, Equipment & Tools

Note: If staff had not tied the budget to a specific vendor but had opted to create a Job Seeker Budget instead (refer to step 4 on pages 1 and 2), the Vendor Search page will appear again.

Staff may either tie the payment to a specific vendor at this time by selecting Search **or** proceed with entering the payment by selecting Job Seeker Payment.

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VENDOR SEARCH

Click on a vendor name to move to the next section.

Vendor ID

Name

Business Name

FEIN

First few letters of city


ZIP

Search Clear

3. On the New Payment page, enter the payment amount.

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John Pseudo
NEW PAYMENT

 You are making a payment directly to the job seeker [John Pseudo].

Service: Occupational Skills Training [12741695]

Participant Group: 000 - No Participant Group

PO Number:

Actual Start Date: May 12, 2022

Estimated End Date: May 12, 2022

Other

PY Budget Overview

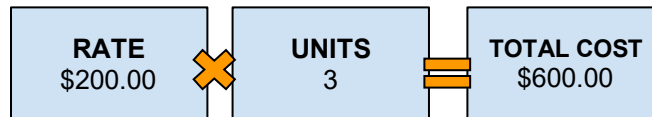
Year	<u>Amount Budgeted</u>	<u>Amount Spent</u>	Available
2021	\$2,750.00	\$0.00	\$2,750.00
2022	\$0.00	\$0.00	\$0.00
2023	\$0.00	\$0.00	\$0.00

- a. Under Payment Information Type, select Actual or Accrual.
- b. In the Rate field, enter the amount to be paid. The amount entered in this field may be either --
 - i. a flat rate or total amount to be paid, such as the entire payment for books or for tuition and fees; or
 - ii. the cost per unit, such as the tuition cost per credit hour. (Refer to the example under Units.)
- c. In the Units field, enter the appropriate **multiplier** to the amount entered in the Rate field.
 - i. If the amount entered in the Rate field is a flat rate or total amount to be paid, staff must enter "1" in the Unit field.

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- ii. If the amount entered in the Rate field is the *cost per unit*, the appropriate number of units must be entered in the Units field.

E.g., the amount in the Rate field is the tuition cost *per credit hour*, the number of credit hours to be paid must be entered in the Unit field:



- d. Enter the payment Begin Date and End Date. The dates must be within the actual start date and estimated end date of the service.

Payment Information

Type (required)

Actual

Accrual

Rate (required)

2750.00

i Put a minus sign (-) before the units number to create a negative payment for a returned check, refund or negative adjustment.

Units (required)

1

Begin Date (required)

May 12, 2022

📅 Today

End Date (required)

May 12, 2022

📅 Today

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- e. Enter the Invoice Date and Invoice/Reference Number.

For these instructions, these fields are optional. Staff may refer to their fiscal agent to determine the appropriate invoice or reference number to use.

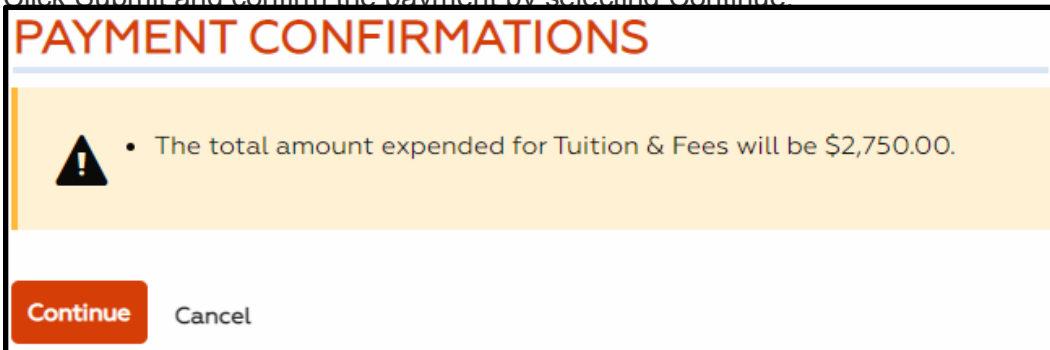
- f. Under Payment Status, select either Partial Payment or Final Payment.

The screenshot shows a web form with the following sections:

- Invoice/Reference Number:** A text input field containing the number "1234".
- Payment Status:** Two radio button options: "Partial Payment" (unselected) and "Final Payment" (selected).
- Comments:** A rich text editor with a toolbar containing icons for bold (B), italic (I), bulleted list, numbered list, undo, redo, and link. Below the toolbar is a large empty text area.
- Submit:** An orange button located at the bottom left of the form.

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4. Click **Submit** and confirm the payment by selecting **Continue**:

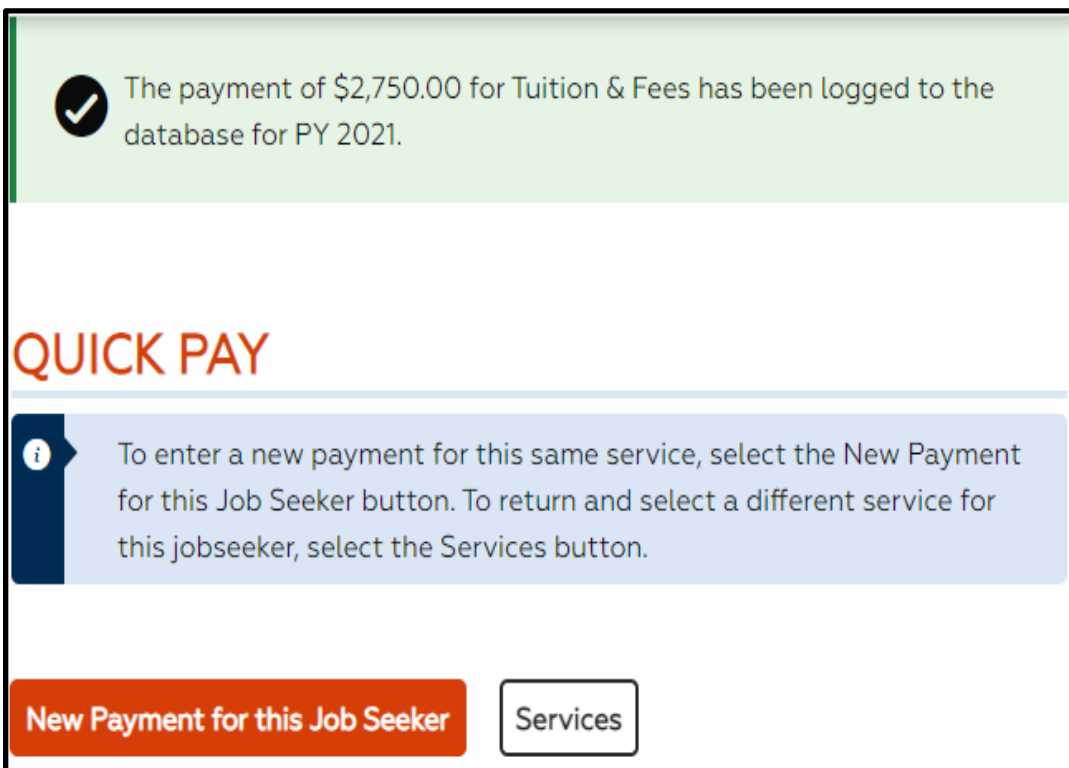


PAYMENT CONFIRMATIONS

⚠ • The total amount expended for Tuition & Fees will be \$2,750.00.

Continue Cancel

5. Selecting **continue** displays the Confirmation Log and Quick Pay screen.



✓ The payment of \$2,750.00 for Tuition & Fees has been logged to the database for PY 2021.

QUICK PAY

i To enter a new payment for this same service, select the **New Payment for this Job Seeker** button. To return and select a different service for this jobseeker, select the **Services** button.

New Payment for this Job Seeker Services

6. From the Quick Pay screen, staff may do either of the following:
- Select **New Payment for this Job Seeker** to enter a new payment related to the service.

Repeat steps 3, 4, and 5 above after selecting this option.

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- b. Select Services to go to the “Budgetable” Services for the participant.

i Click on the training/service name to make a payment. Only services that have been budgeted and have actual start dates will appear in this list.

Budgetable Services

Training	Service Num	Project	Fund	Begin Date	School Status
Adult (Local Formula) – 2022-05-12					
Occupational Skills Training	12741695		Adult (Local Formula)	2022-05-12	N/A

7. To return to the case details for the job seeker. Select the job seeker’s name at the top left in the Navigation pane.