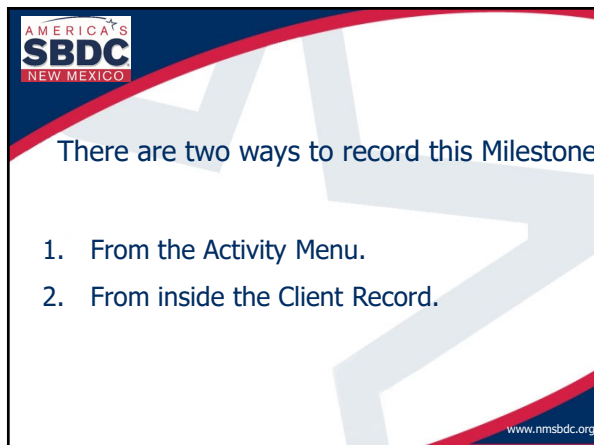


Hello and welcome to the New Mexico Small Business Development Neoserra Pandemic Unemployment Assistance Training.

This is a recorded training to show how the NMSBDC Network will capture the number of clients who received Pandemic Unemployment Assistance.



There are two ways to record this information . 1. From the Activity Menu. 2. From inside the Client Record. You will see that when you are proceeding through option 1, option 2 will intersect and the final steps will be the same regardless of the option.



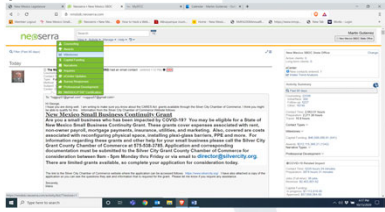
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Option 1 Cont.

Look for "Milestone" as an option in the drop down menu and click on it.



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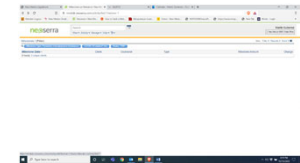
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Option 1 Cont.

On the top right hand side of the page that will appear, look underneath your name, click on "New". This action will take you to the page to enter the Pandemic Unemployment Assistance Milestone.



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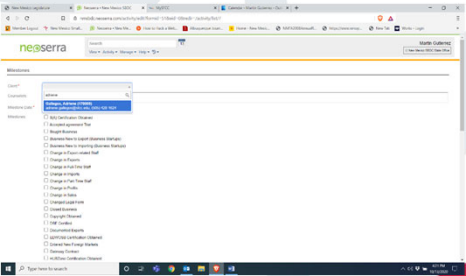
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Option 1 Cont.

Enter the client name.



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Option 1 Cont.

Enter the Milestone date

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Option 2

From inside the Client Record;
Click on New and select Milestone from the dropdown menu.

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This is where the two options will intersect. If you are already working in a client record, go the right side of the record and click on "New" and select "Milestone" from the dropdown menu.

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Option 2 Cont.

From inside the Client Record:
From this point, the process is the same whether you are using Option 1 or Option 2.

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From this point, the process is the same whether you are using Option 1 or Option 2.

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Option 1 & 2
Cont.

In the alphabetical list of Milestones, click on "Pandemic Unemployment Assistance".

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Option 1 & 2
Cont.

Check the box labeled "COVID-19 related"

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Leave the reportable box checked.

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Option 1 & 2
Cont.

Put in good notes.

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Option 1 & 2
Cont.

Click on Save.

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Option 1 & 2
Cont.

Select "No" when prompted "Do you want to schedule a follow-up action".

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The next page you will see, will ask you if you want to schedule a follow up action.

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Option 1 & 2
Cont.

You should next go to the client record to verify that the Milestone was recorded.

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This icon indicates a Milestone. Point to Milestone icon.

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To run a report to show the number of people that have received PUA assistance, use the below filter parameters:

- ❖ Milestone type> Pandemic Unemployment Assistance
- ❖ COVID-19 related> Yes
- ❖ Click Apply

Keep in mind we are not tracking the \$ amount

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The report should look similar to this; MilestoneDate,Client, Counselor and Type. Notice, there should be no Milestone Amount.

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Thank you for your continued dedication to your communities and the entrepreneurs of New Mexico

The New Mexico Small Business Development Center Network

- Centers Statewide
- No-Cost confidential business consulting
- Low-cost business training workshops
- Certified business professionals

The NMSBDC is funded in part through a cooperative agreement with the U.S. Small Business Administration. All options, conclusions or recommendations expressed are those of the NMSBDC and do not necessarily reflect the views of the SBA. Reasonable accommodations for persons with disabilities will be made if requested at least two weeks in advance.

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If you have any questions, please contact Martin Gutierrez, Associate State Director of Grant Compliance at Martin.Gutierrez@sfcc.edu
Thank you.
