ISAAC User Guide for Companies

Funded by the Pennsylvania Department of Community & Economic Development, WEDnetPA provides funding to qualified PA employers to train eligible PA employees.

View our Company Guidelines for current program eligibility requirements.

This User Guide will assist companies in accessing and using the *Information Sharing, Administration & Analysis Center* (ISAAC) portal that manages all data aspects of the WEDnetPA program. ISAAC is housed on a Salesforce platform.

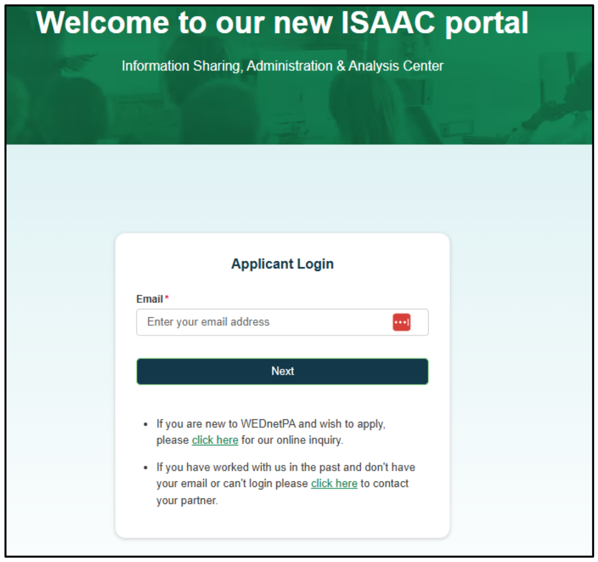
For additional information or assistance, please reach out directly to one of our current 22 WEDnetPA partners: https://wednetpa.com/our-partners/

Contents

Log in

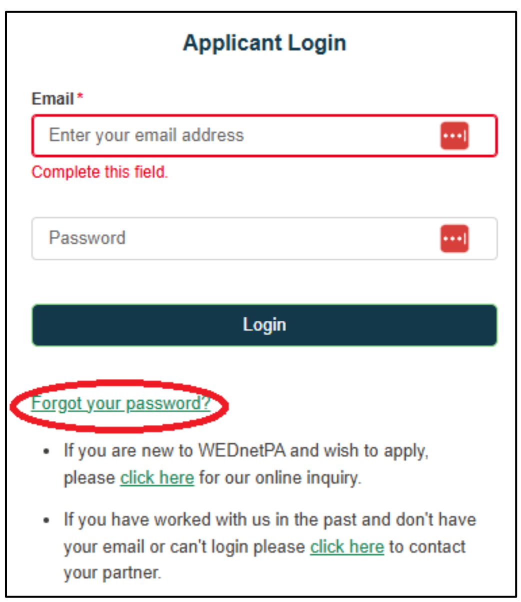
How do I log in?

You can log in at the following URL: https://wednetpa.my.site.com/company using your username and password. You will be required to login using multi-factor authentication (MFA). If you forget your password, you can click the link at the bottom of the page. This production site is unique to **Companies only.**



How do I recover my password?

On the log in page, a user can click on "Forgot your password?" link after entering their username (or email address as the screenshot states?). The user will receive an email to reset their password.



Do I need to use Multi-Factor Authentication (MFA)?

Yes. All users are required to log in using MFA. Each time you log out of Salesforce, you will be required to log in again using MFA. A forced logout will occur every 24 hours.

The recommended apps for MFA are:

- Salesforce Authenticator. More information can be found here.
- Google Authenticator
- Microsoft Authenticator

Different authenticator apps may have unique features and user interfaces which can lead to variations in how to complete the MFA process. Apps may require a code or allow a tap to log in, depending on the MFA you choose. At no time will you be required to purchase anything to use MFA.

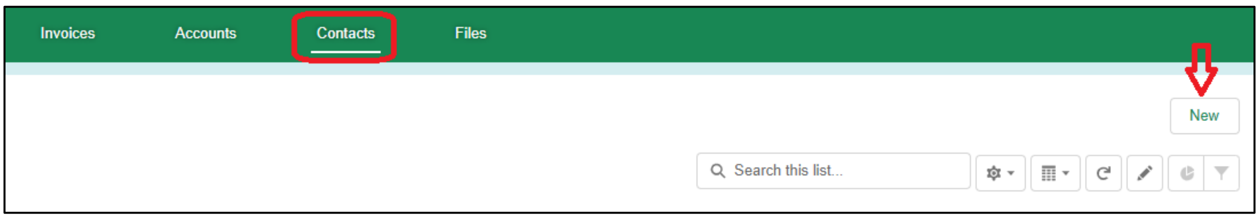
Company Administration

Company / Accounts

Companies are referenced as "Accounts" in ISAAC.

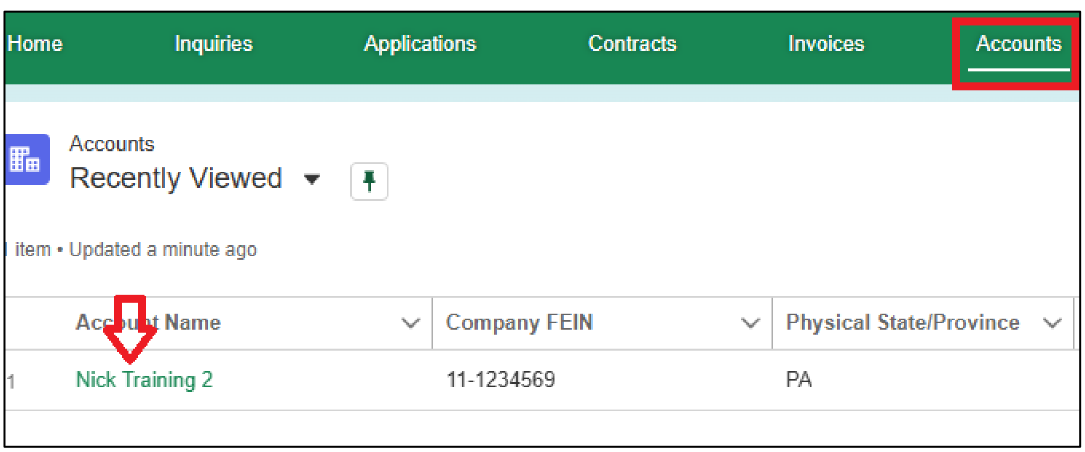
How do I add additional users?

Users who are listed as the **Primary** can add company users by selecting the Contacts menu option. Once on the Contacts menu, the user can click on "New" to add additional users.

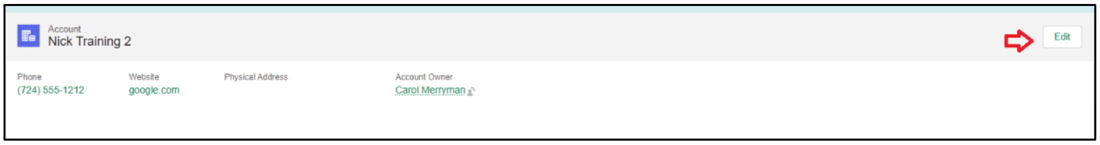


How do I edit my Company information?

Users who are listed as the **Primary** can edit their company information by first selecting the Accounts menu option. Once on the Accounts menu, the user can click on the name of their organization to view the Account Detail screen.



Once on the Account Details tab, the user can click on "Edit" to make the necessary changes. FEINs cannot be modified so if a company's FEIN has changed, the user will need to submit as a new company through the public inquiry site or the partner can create the new Account/FEIN on behalf of the company. If the company's name has changed but their FEIN remains the same, the existing Account can be updated.



Contract Stages

Inquiry

The inquiry is your company's way of expressing interest in participating in WEDnetPA for the current fiscal year and provides details about the company

- New companies can submit an inquiry directly from the wednetpa.com public site.
- Enter basic company and contact information
- Existing companies must log into ISAAC to submit a new inquiry.

Once your inquiry is submitted, it will be reviewed by your selected partner. When the partner accepts the inquiry, it becomes a pending application.

(See: How do I submit an inquiry)

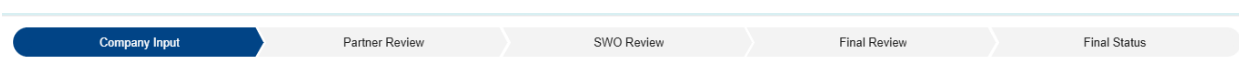
Application

The application is where your company provides details about your training plan for review.
You'll be asked to:

1. Add the proposed training events
2. Submit the application for review

Once you submit your pending application, your selected WEDnetPA partner will review the information for accuracy, verify company and training eligibility and send it to the Statewide Office for approval. If any questions need to be addressed, the application will be sent back to company input status.

Each step of the application process is shown graphically at the top of your application page.



Note: You can begin creating invoices at this stage, but they cannot be submitted until your contract is approved and accepted.

(See: Applications)

Contract

Once your application is approved by the Statewide Office, your company will be required to sign a Memorandum of Agreement (MOA) which must be completed before you can submit invoices to partner review

(See: How do I sign my Memorandum of Agreement (MOA))

After the MOA is signed, you may begin submitting invoices for eligible completed training to partner review

(See: Creating / Viewing an Invoice)

Inquiry

How do I submit an inquiry as a new company?

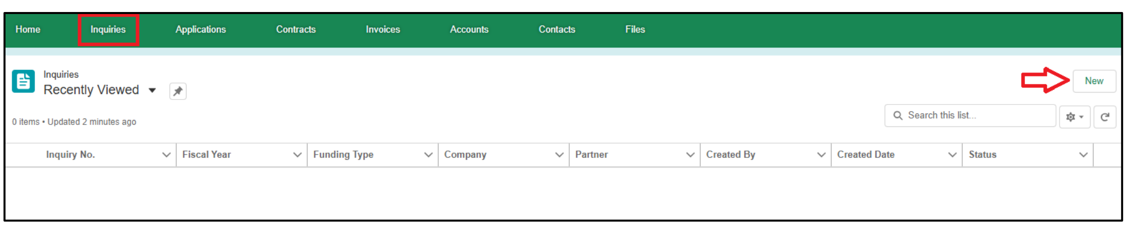
As a new company, a user can visit https://wednetpa.com/apply/ and click on "Apply" and follow the instructions for a new company. The user will be presented with a form to complete as part of the Inquiry process. A few fields to note:

- All fields with a red asterisk are required.
- Enter the correct NAICS code. Users can visit https://www.census.gov/naics/ if they have any questions.
- Zip Codes should be zip +4. If a user does not know their +4, the user can enter 0000 and the +4 will be determined by your partner.
- Please make sure that all email information entered for Primary and Executive contacts is accurate as this will be where the new user invite emails will be sent.

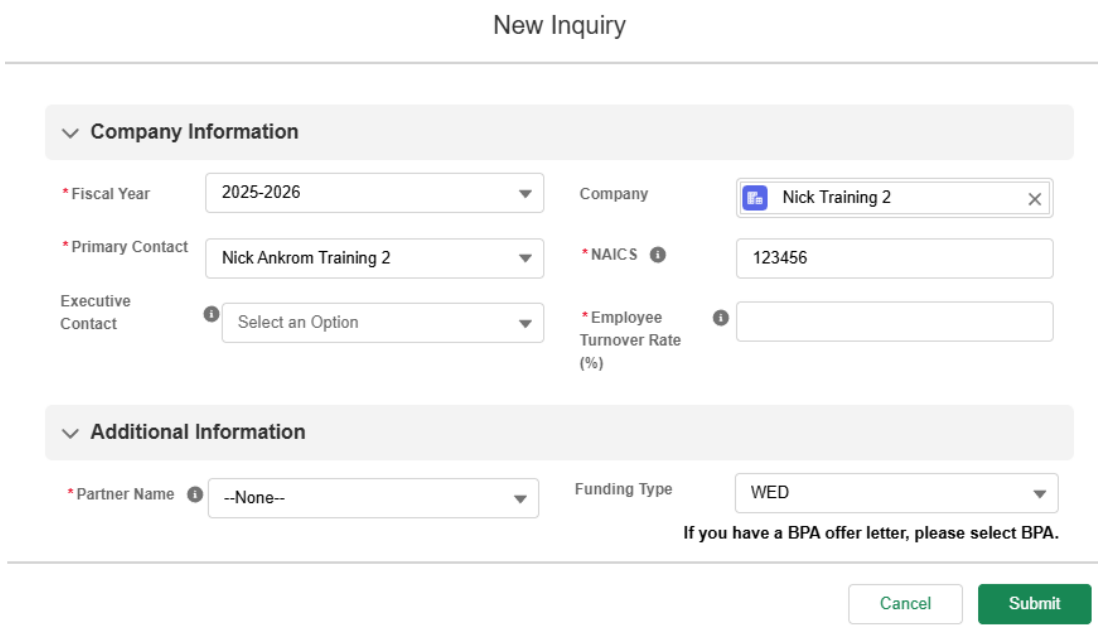
Users will receive a confirmation email that the inquiry was submitted successfully. The user will be able to log in only after the partner accepts the Inquiry.

How do I submit an inquiry as an existing company?

A user can submit a new inquiry as an existing company by logging in to ISAAC and selecting the Inquiries menu option. Once on the Inquiries screen, the user can select "New" to submit a new Inquiry for the current fiscal year.



The user will be presented with a New Inquiry form to complete.

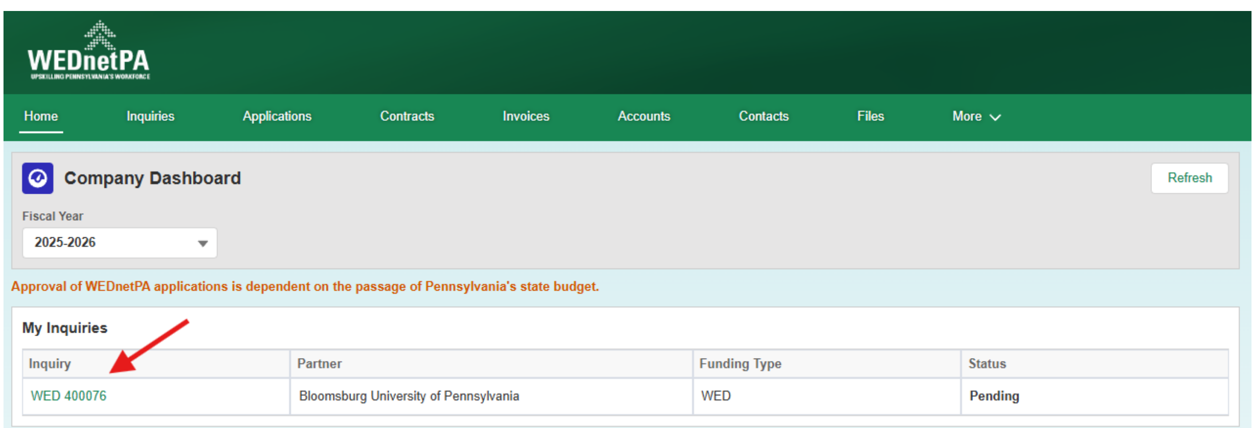


Note: You will need to enter the current employee turnover rate each time you apply.

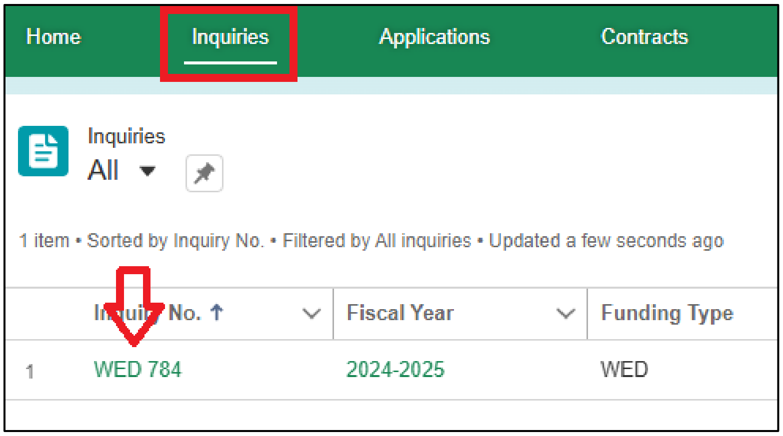
Users will receive a confirmation email that the inquiry was submitted successfully.

How do I view my Inquiry Information?

Users can view information related to their inquiry by selecting the inquiry from their Home tab/Company dashboard.



You can also find your inquiry by selecting the inquiry tab. Once on the Inquiries tab, the user can click on the inquiry they would like to view.

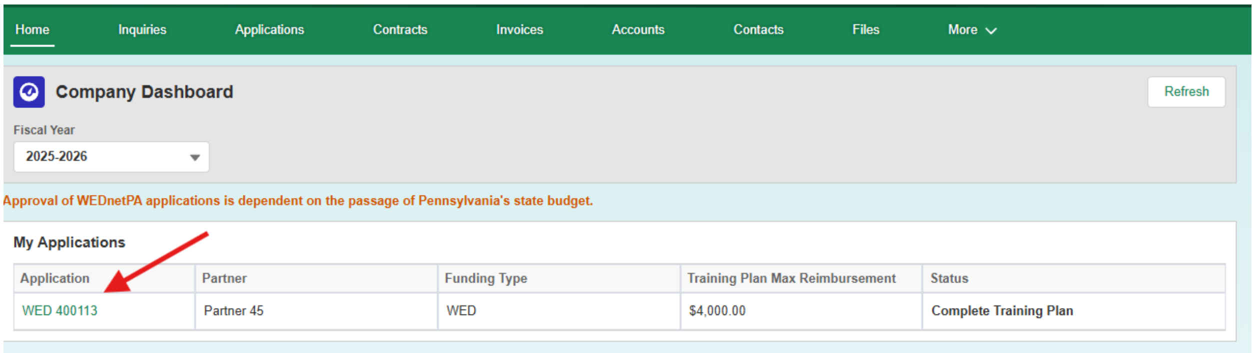


You will receive a bell notification in ISAAC and an email when your inquiry has been accepted by your partner.

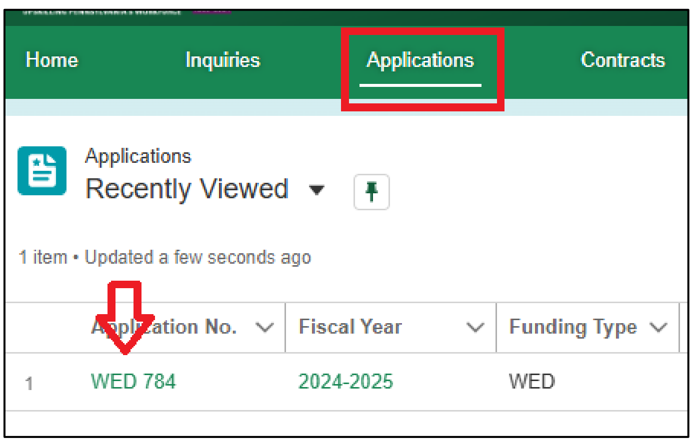
Applications

How do I view or edit my application information?

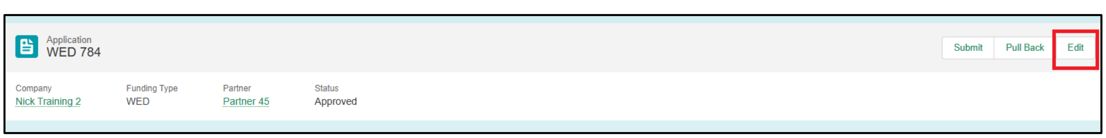
Users can view information related to their application by selecting the application from their Home tab/Company dashboard.



You can also find your application by selecting the application tab. Once on the applications tab, the user can click on the application they would like to view.

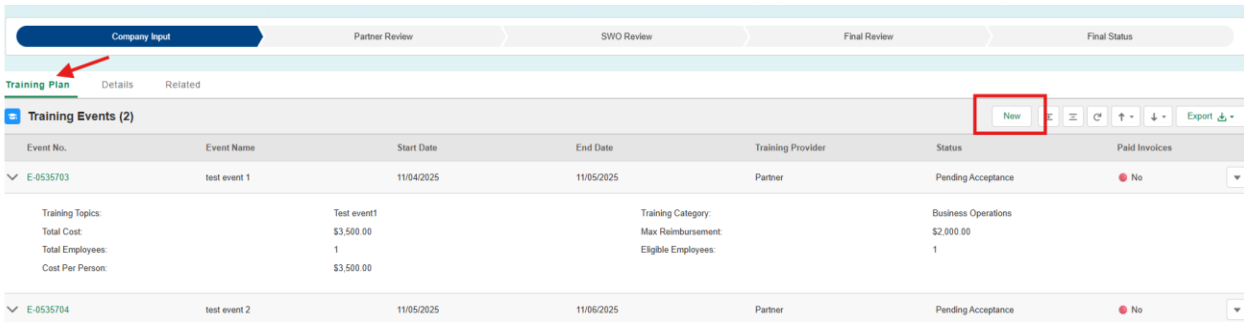


Users can edit their application by then clicking "Edit" from the Application details screen. Editing is locked once the application is submitted to partner review.



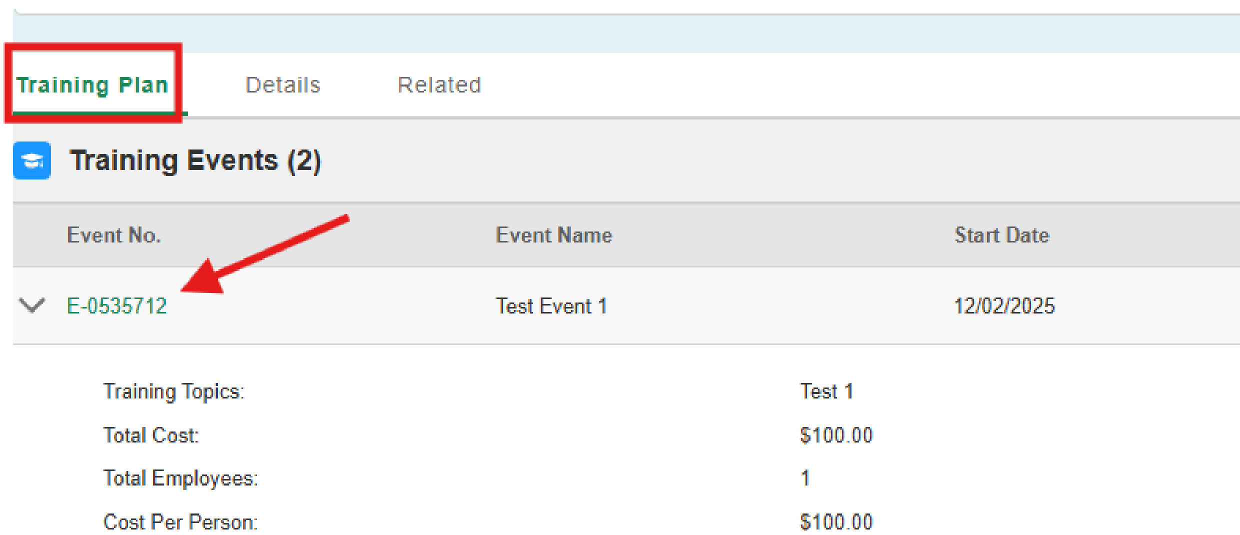
How do I create a Training event?

Users can add a training event by clicking on an application number on their Home tab/Company dashboard. This will default to the Training Plan tab of the application. Users add training events associated with their Training Plan by clicking “New”.



How can I edit a Training event?

Users can edit a training event by clicking on an application on their Home Tab/Company dashboard. This will default to the Training Plan tab for the application. Users can edit training events associated with their Training Plan by clicking on the Training Event they wish to edit.

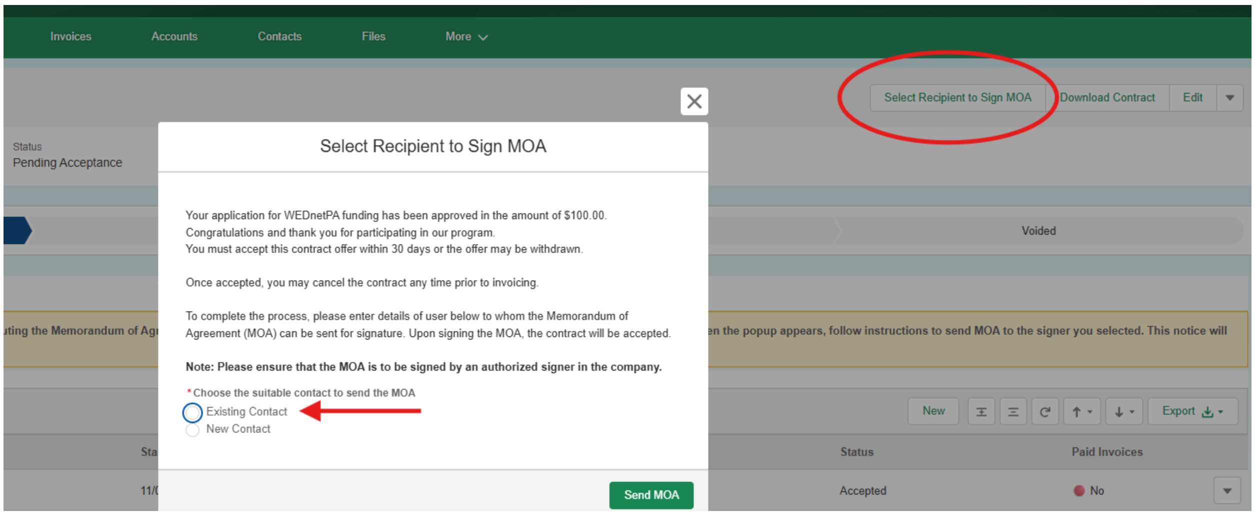


You will receive a bell notification in ISAAC and an email when your application has been approved by the Statewide Office and turned into a pending contract.

Contracts

How do I sign my Memorandum of Agreement (MOA)?

Users must first select "Select Recipient to Sign MOA" from the contract details page. A user will then be presented with a popup that will allow them to send the MOA to an existing ISAAC user or to a user that is outside of ISAAC to electronically sign the MOA.



Note: The MOA must be signed before invoices can be submitted to partner review.

Can I send the MOA to someone other than myself?

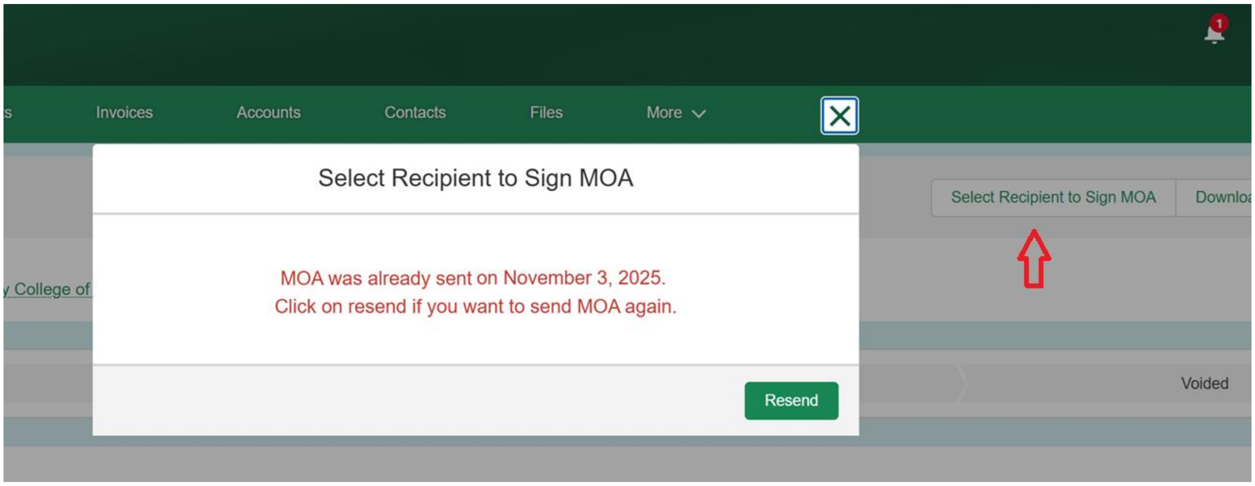
Yes. Users must first select "Select Recipient to Sign MOA" from the contract page. The user will then be presented with a popup to send the MOA to a user that is outside of the system to electronically sign the MOA by selecting "New Contact" and then entering the signer's email address.

What If the user who was sent the MOA has changed positions

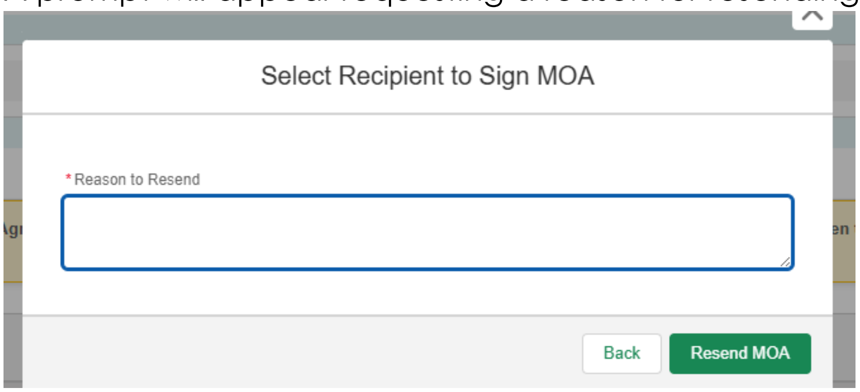
If the person who originally received the MOA is no longer the correct signer **and the MOA has not yet been signed**, you can update the recipient. Updating the recipient will void the original MOA and allow you to send a new one.

To start, click on "Select Recipient to Sign MOA" from the contract dashboard.

If the MOA was already sent, a popup will appear stating the MOA was already sent.

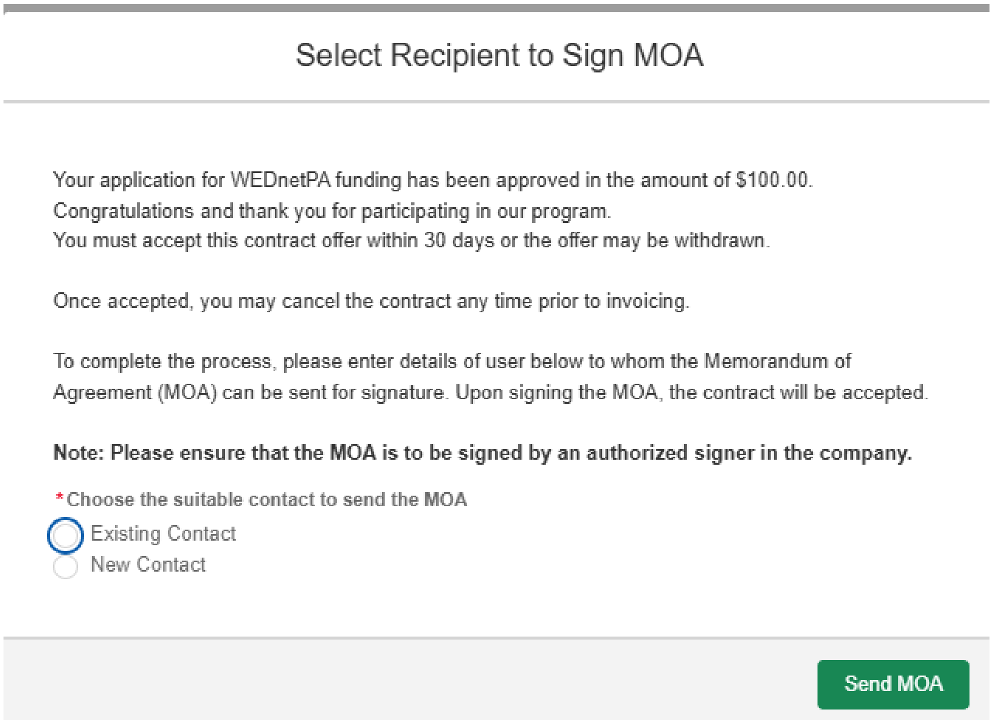


Click "Resend."
A prompt will appear requesting a reason for resending the MOA.



Enter the reason, such as "Executive changed" or "User retired," then click "Resend MOA."
This action voids the original MOA.

You can then select the new recipient.



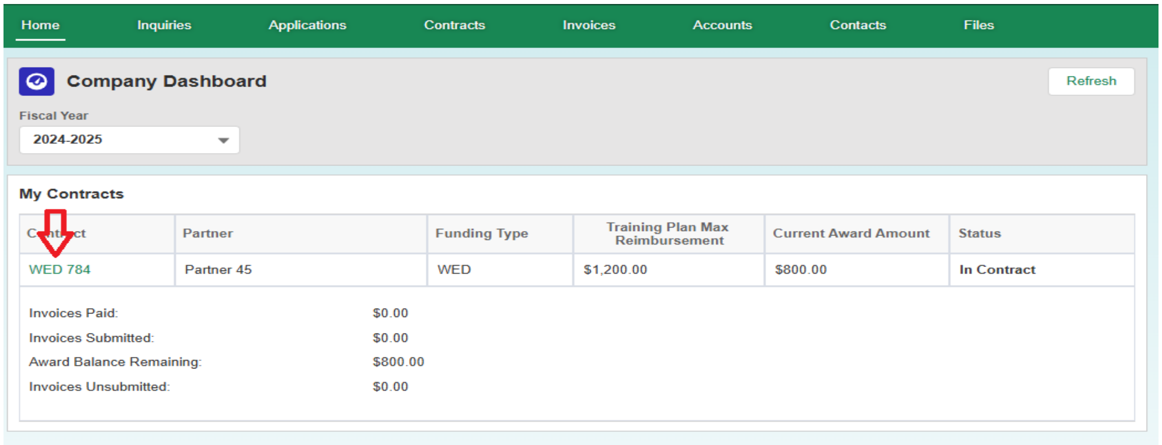
Select who should receive the MOA:

- Click “Existing Contact” to select someone already in the system, or
- Click “New Contact” to add a new recipient.

Click on "Send MOA". That will send the selected user an email from Docusign with the MOA to be executed.

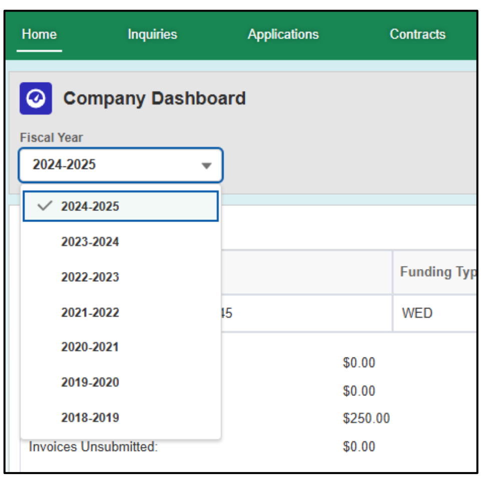
How can I view information about my contract?

Once an application is approved, users will see the active contract on their Home tab/Company dashboard. High-level information will be available on the Company dashboard. A user can click on the Contract number to see the contract details.



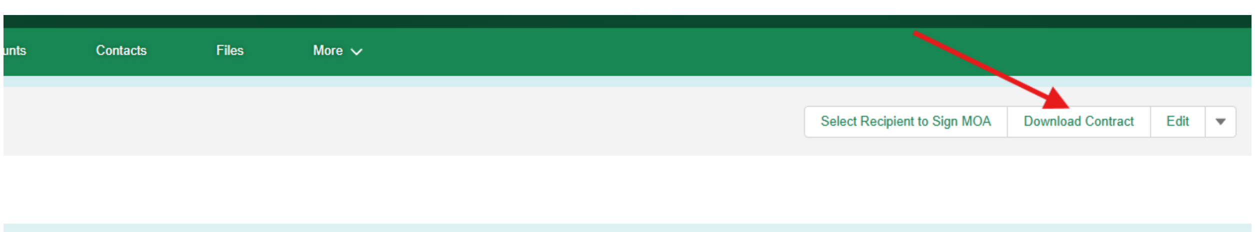
How can I see previous years' information?

Users can view previous years' information using the Fiscal Year Dropdown on the Home Tab/Company dashboard or by going to the Account's related tab.



Downloading the contract

You can download a copy of the contract information by clicking on "Download Contract" from the contract dashboard.



Creating/Viewing an Invoice

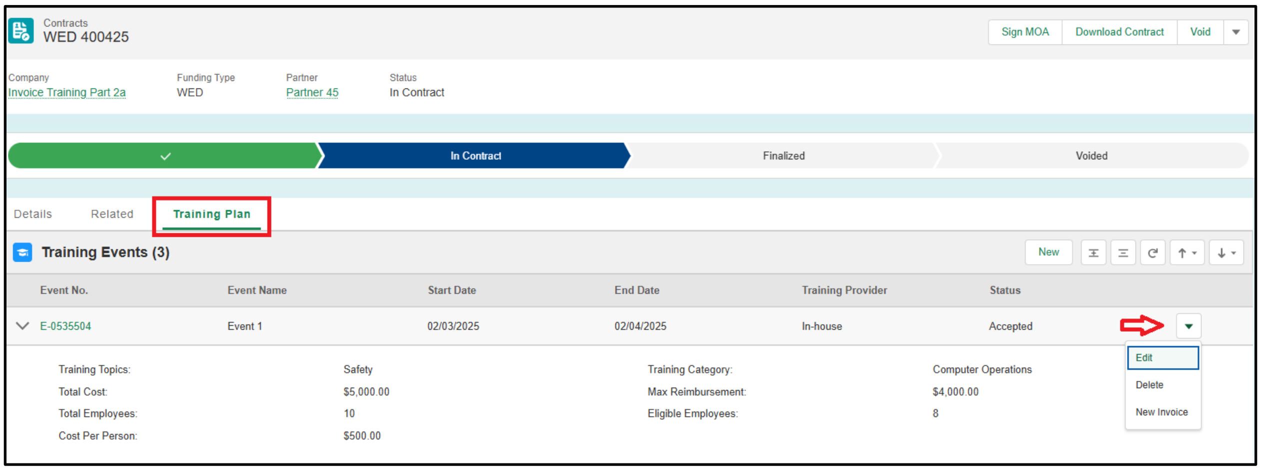
How do I create an invoice?

Users can create invoices on a pending application and while a contract is in **Pending Acceptance** status, but the contract will need to be promoted to **In Contract** status before a user can submit the invoice to **Partner Review** status.

Users can create an invoice from one of two locations:

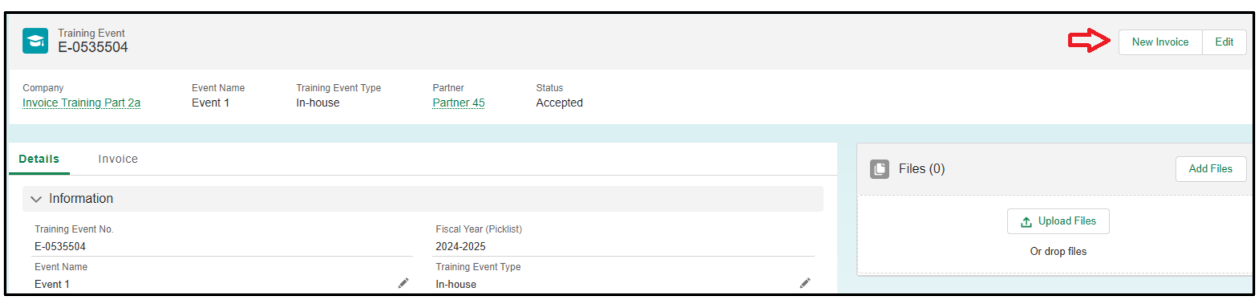
Option 1. Contract > Training Plan tab

Users can select New Invoice from the dropdown for a specific training event.



Option 2. Contract > Training Plan tab > click on training event number to bring up Training Event Details

Users can click on New Invoice from the top right corner.

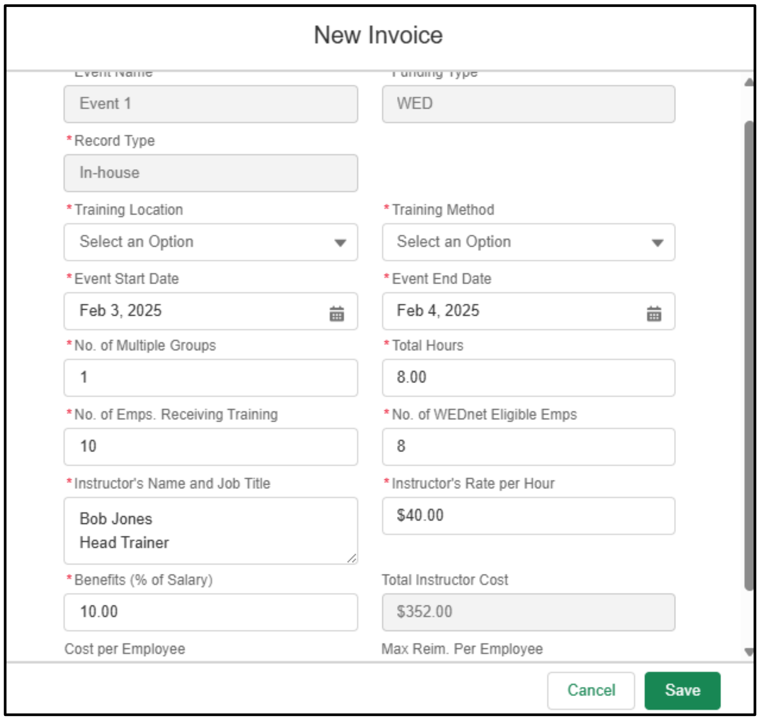


Need to replace this screenshot with the current view that does not allow files to be added on this page by companies.

After clicking New Invoice from either location, the user will be presented with a New Invoice form. The information from the training plan will pre-populate some fields which are grayed out and cannot be edited from this screen. To edit any of the grayed-out fields, it will require the user to Cancel the creation of the new invoice and edit the applicable training event details on the training plan before recreating the invoice.

Fields that have an * are required fields. Users will not be able to save an invoice until all required fields have been completed.

Clicking Save at the bottom of the screen will create the invoice.



How do I view an invoice?

Users can access invoices from a variety of screens. Below are a few of the most common ways to access an invoice.

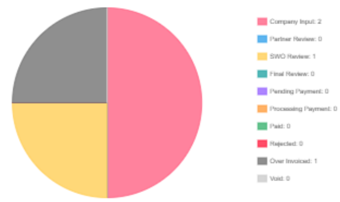
From the Company dashboard/Home tab, users can click on the appropriate piece of the invoice pie chart.

My Contracts

Contract	Partner	Funding Type	Training Plan Max Reimbursement	Current Award Amount	Status
WED 400425	Partner 45	WED	$17,000.00	$22,000.00	**In Contract**

Invoices Paid:	$0.00
Invoices Submitted:	$8,440.00
Award Balance Remaining:	$13,560.00
Invoices Unsubmitted:	$44,725.00

Invoice Status:

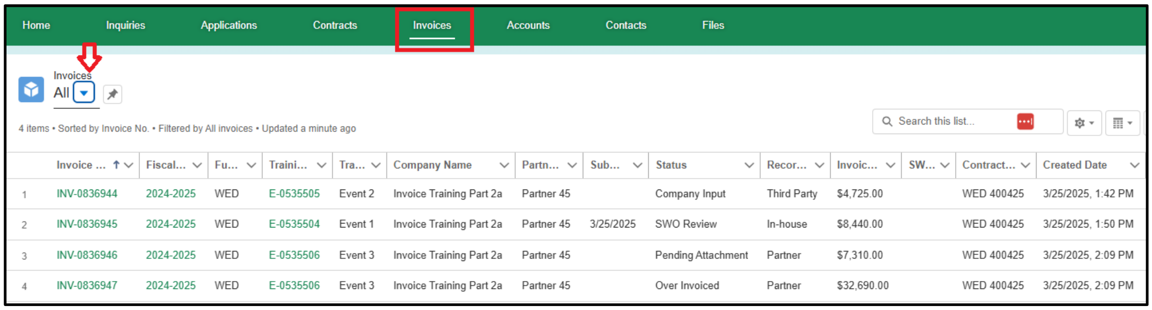


Users can view a list of invoices that match the status of the selected pie piece. The user can then click on the applicable Invoice number to view the details of the selected invoice.

Invoices at "Company Input" Status

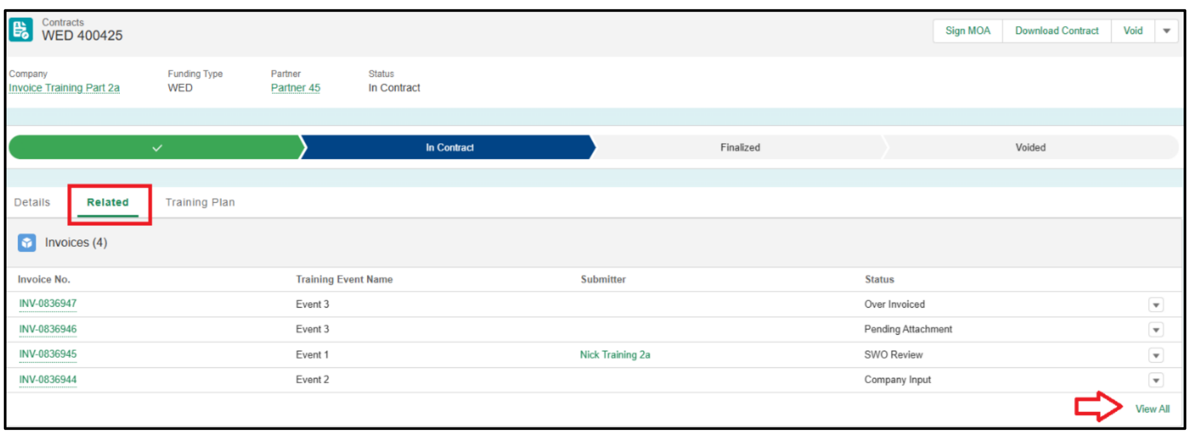
Invoice Number	Funding Type	Partner	Training Event Name	Invoice Reimbursement
INV-0836946	WED	Partner 45	Event 3	$7,310.00
INV-0836944	WED	Partner 45	Event 2	$4,725.00

From the Invoices Tab in the global navigation bar, users can view a full list of all invoices, regardless of fiscal year. If a user is unable to see a particular invoice, make sure the correct list view has been applied.



	Invoice ...	Fiscal...	Fu...	Traini...	Tra...	Company Name	Partn...	Sub...	Status	Recor...	Invoic...	SW...	Contract...	Created Date
1	INV-0836944	2024-2025	WED	E-0535505	Event 2	Invoice Training Part 2a	Partner 45		Company Input	Third Party	$4,725.00		WED 400425	3/25/2025, 1:42 PM
2	INV-0836945	2024-2025	WED	E-0535504	Event 1	Invoice Training Part 2a	Partner 45	3/25/2025	SWO Review	In-house	$8,440.00		WED 400425	3/25/2025, 1:50 PM
3	INV-0836946	2024-2025	WED	E-0535506	Event 3	Invoice Training Part 2a	Partner 45		Pending Attachment	Partner	$7,310.00		WED 400425	3/25/2025, 2:09 PM
4	INV-0836947	2024-2025	WED	E-0535506	Event 3	Invoice Training Part 2a	Partner 45		Over Invoiced	Partner	$32,690.00		WED 400425	3/25/2025, 2:09 PM

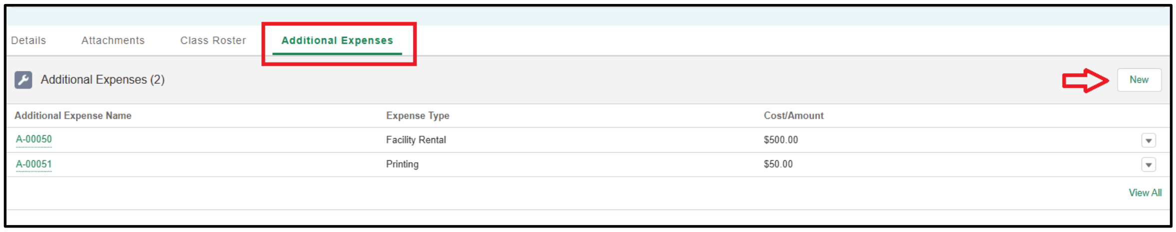
From the Related tab on the contract (not Account) screen, a user can view a full list of invoices for the contract. If there is a long list of invoices, the user may need to click on View All. Please note that no invoices will appear on the contract's related tab until the application is approved. To see invoices prior to contract approval, you can view them on the Account's related tab, which is not fiscal year specific.



Invoice No.	Training Event Name	Submitter	Status
INV-0836947	Event 3		Over Invoiced
INV-0836946	Event 3		Pending Attachment
INV-0836945	Event 1	Nick Training 2a	SWO Review
INV-0836944	Event 2		Company Input

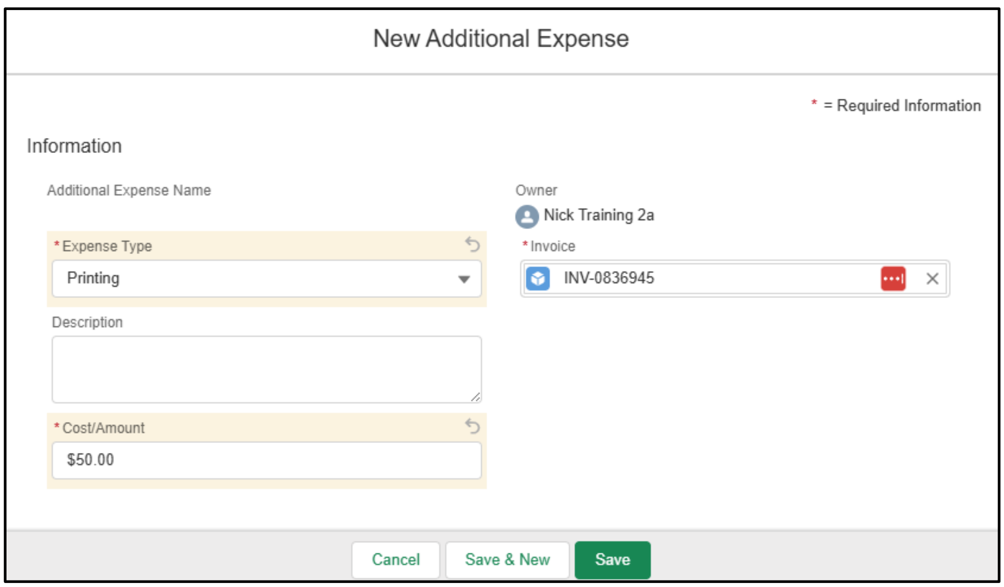
Adding Required Documentation for Invoices

How do I add additional expenses for in-house training events?
Additional Expenses is optional and not required. Users can add additional expenses by accessing the Additional Expenses tab (only available for in-house training events) on the invoice screen. Users click on New on the right side of the screen.



Users will fill out all required fields noted by an * on the form.

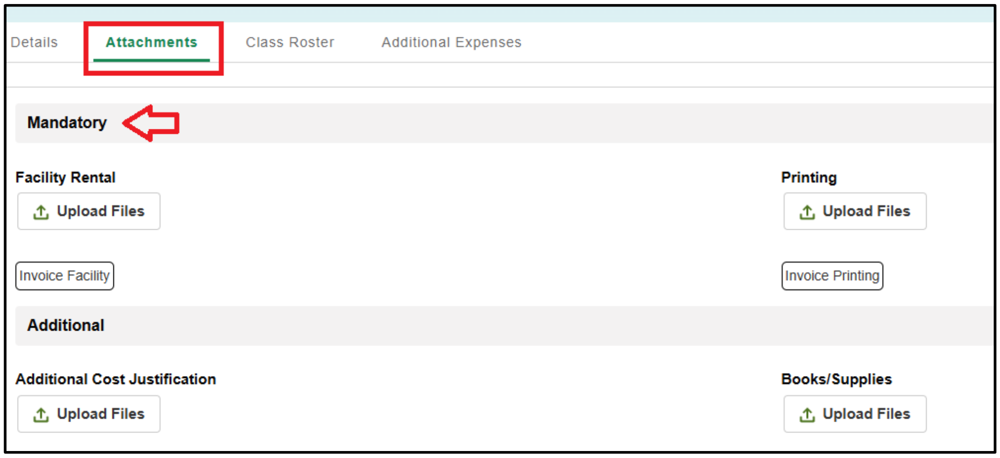
- Clicking Save will add the new additional expense and close the form.
- Clicking on Save & New will add the new expense and open a new form to fill out another New Additional Expense form.



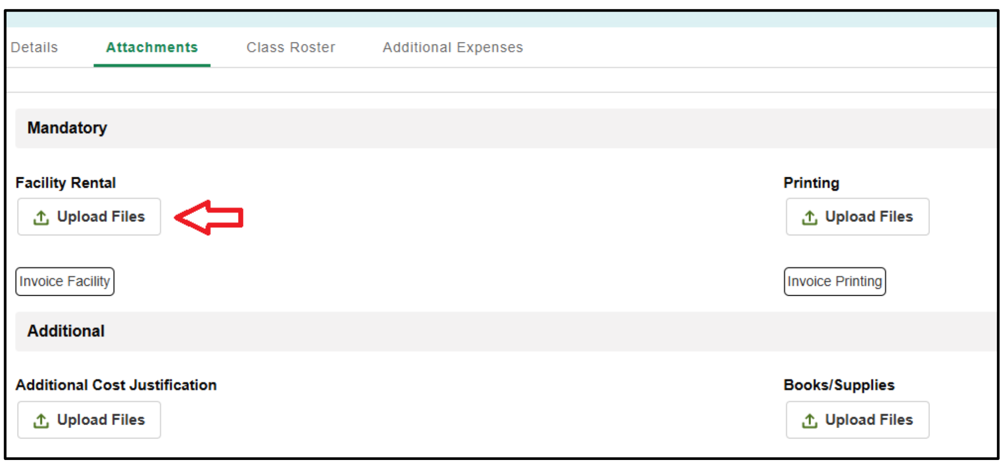
How do I add an Invoice Attachment?

Users can add attachments from the Attachments tab on the Invoice. Required attachments will be listed under the Mandatory section. The required attachments will be based on the training vendor type selected on the training plan along with any Additional Expense Types (if applicable).

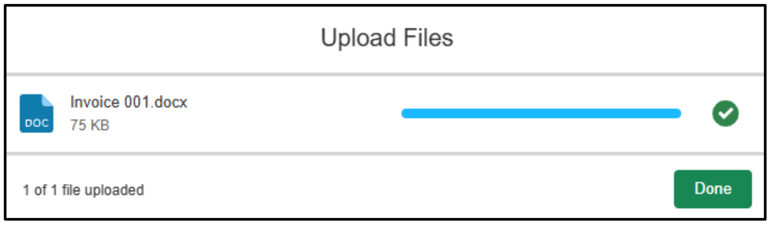
All sections listed as mandatory will require a file to be attached before a company user can submit the invoice to **Partner Review** status.



Users can click on the Upload Files button under the appropriate section to attach a file to the specified category.

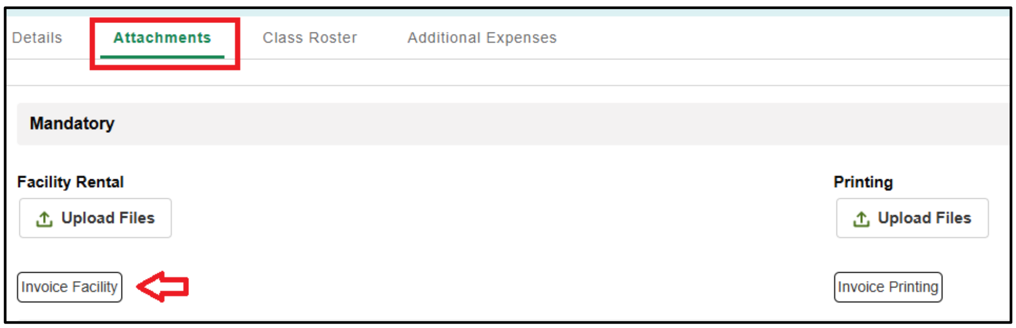


Users will be provided with a window to select the file they wish to upload. Once selected, the system will display an Upload Files window with the progress of the upload. Once completed, the user will be presented with a green check mark and have the ability to click Done.

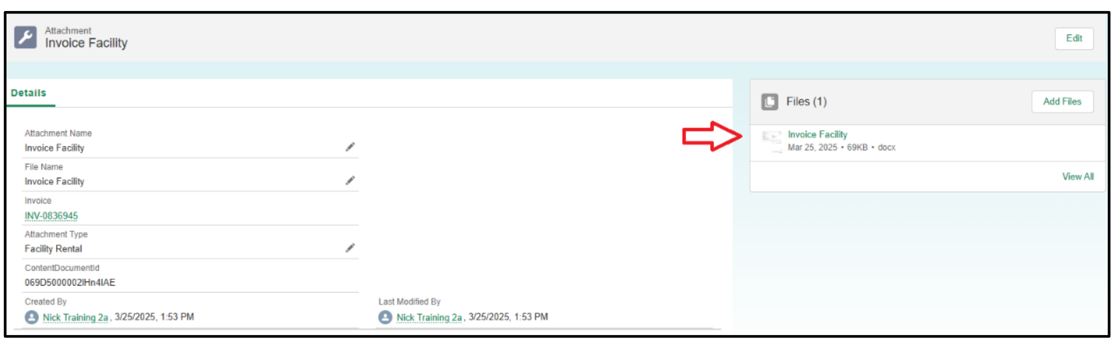


How do I view my Invoice Attachments?

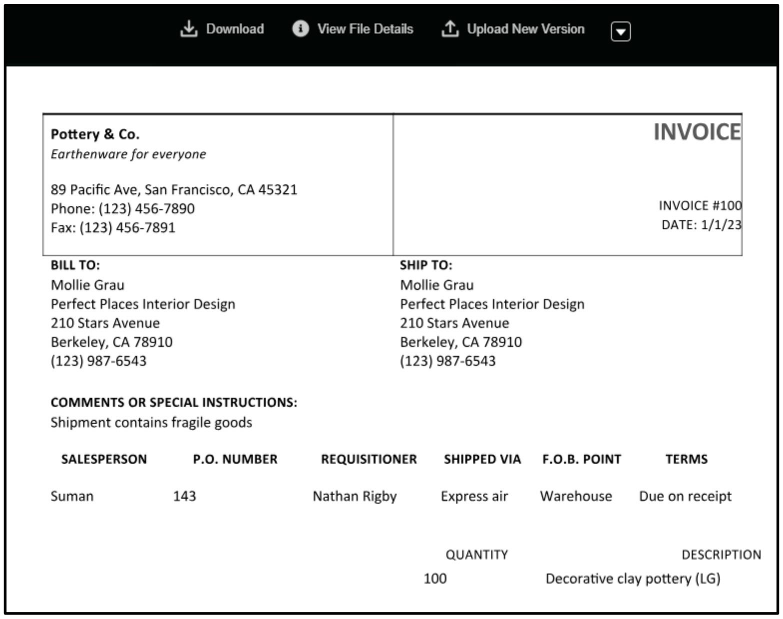
Users can view their attachments by accessing the Attachments tab on the invoice. On the Attachments tab, the user can click on any of the files that have been uploaded.



Users can then click on the appropriate file from the right side of the screen to open a preview of the file.



From the preview, a user can view and/or download the file.



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Phone: (123) 456-7890
Fax: (123) 456-7891

INVOICE

INVOICE #100
DATE: 1/1/23

BILL TO:
Mollie Grau
Perfect Places Interior Design
210 Stars Avenue
Berkeley, CA 78910
(123) 987-6543

SHIP TO:
Mollie Grau
Perfect Places Interior Design
210 Stars Avenue
Berkeley, CA 78910
(123) 987-6543

COMMENTS OR SPECIAL INSTRUCTIONS:
Shipment contains fragile goods

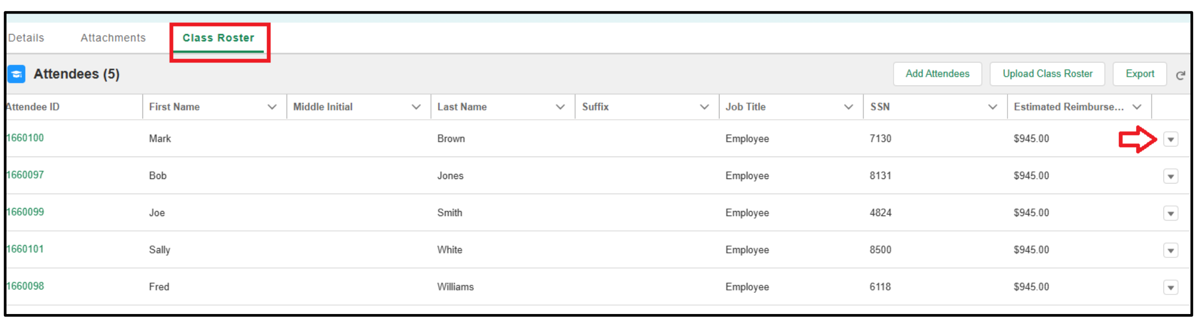
SALESPERSON	P.O. NUMBER	REQUISITIONER	SHIPPED VIA	F.O.B. POINT	TERMS
Suman	143	Nathan Rigby	Express air	Warehouse	Due on receipt

QUANTITY	DESCRIPTION
100	Decorative clay pottery (LG)

How do I add a Class Roster?

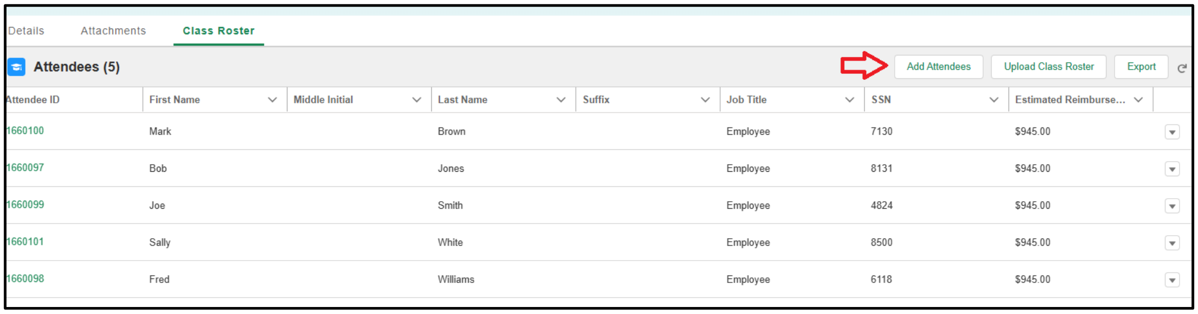
Users can add a class roster by accessing the Class Roster tab on the invoice. Users can add eligible attendees manually or through an upload file. Once the eligible attendees are added, the list of eligible attendees will be visible on the Class Roster tab. The number of eligible attendees added to the class roster must match the No. of WEDnet Eligible Emps. field on the invoice.

From this screen, a user can view/edit/delete eligible attendees using the dropdown next to the attendee's name.

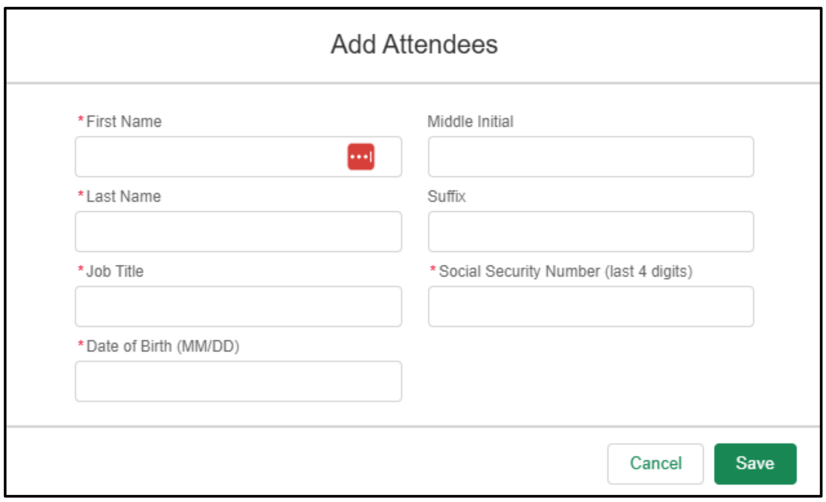


Attendee ID	First Name	Middle Initial	Last Name	Suffix	Job Title	SSN	Estimated Reimburse...
1660100	Mark		Brown		Employee	7130	$945.00
1660097	Bob		Jones		Employee	8131	$945.00
1660099	Joe		Smith		Employee	4824	$945.00
1660101	Sally		White		Employee	8500	$945.00
1660098	Fred		Williams		Employee	6118	$945.00

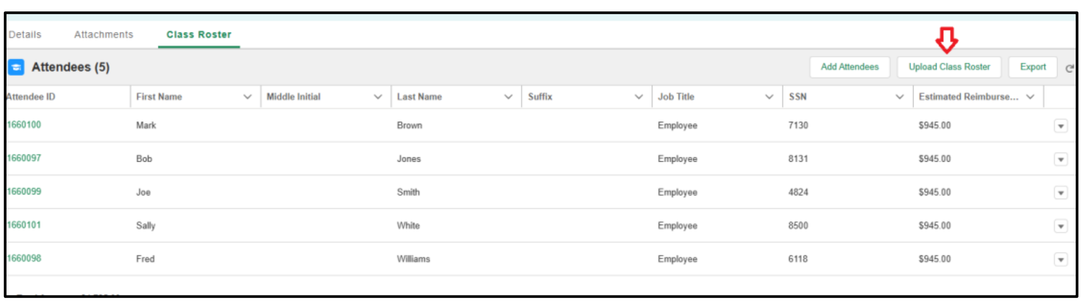
Manually Adding a User: A user can manually add eligible attendees by clicking the Add Attendees button.



Users will need to fill out all required fields indicated by an * on the Add Attendees form. When all required fields are filled out correctly, the user can click Save to add the eligible attendee.

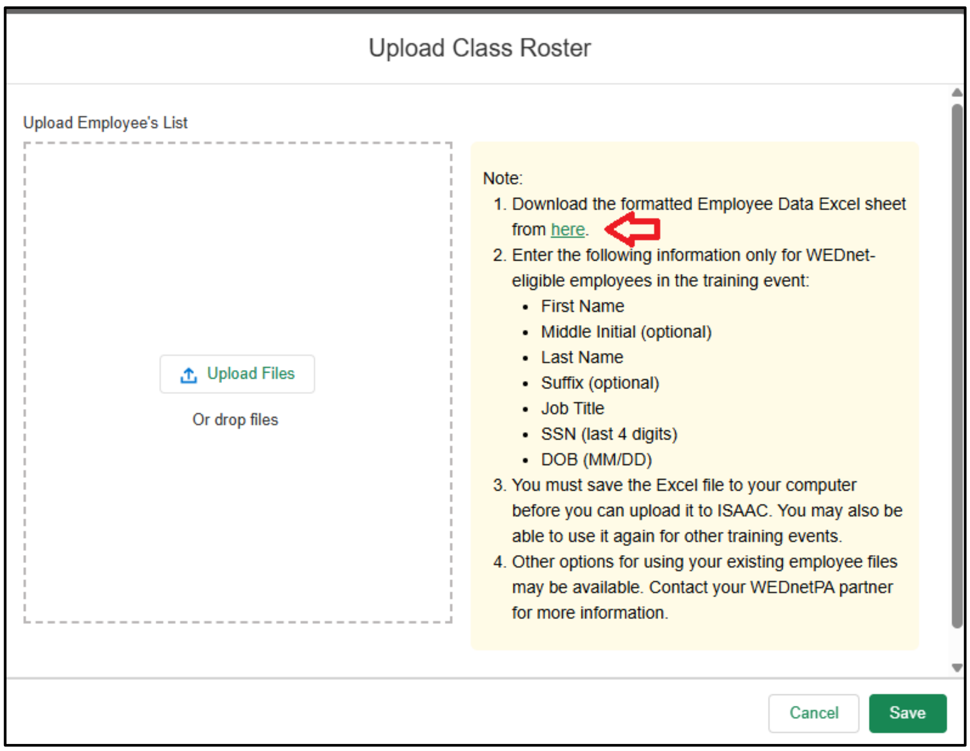


Uploading a Class Roster: A user can upload multiple eligible attendees by clicking on the Upload Class Roster button.

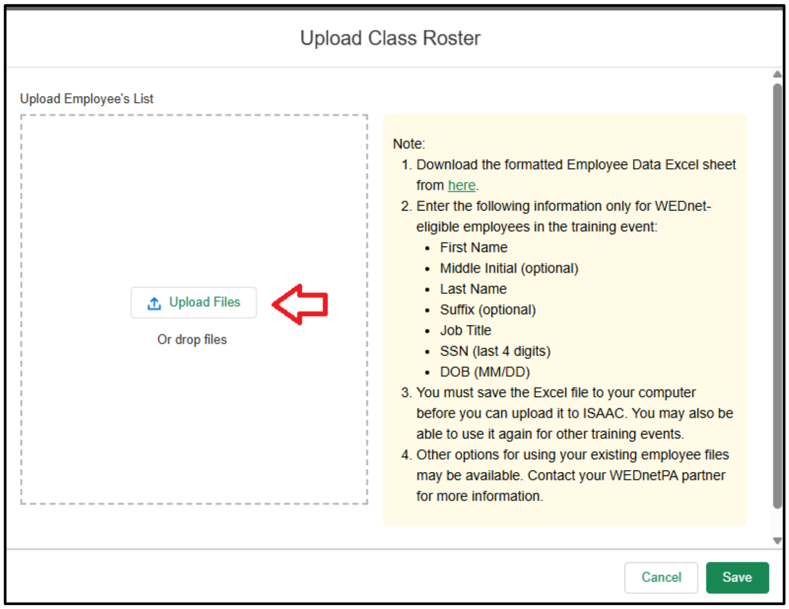


The user will be presented with an instructions page on how to use the upload class roster functionality. A few notes:

1. Employee names should not be entered in all CAPS or all lowercase.
2. First letter of legal first name, legal last name, suffix (if applicable) and job title should be capitalized. Lower case employees' names will be returned. Middle initials or middle names should not appear in Legal First Name field. Nicknames should not be used as an employee's Legal First Name. Suffix should not appear in Legal Last Name field.
3. The user can download the employee upload template from the instructions screen.
4. All required fields must be filled out for each eligible attendee. If any attendee is missing required information, the upload will fail. Middle initial and suffix are optional.
5. Users must **NOT** change the structure of the template. This includes changing the titles of columns, adding/deleting rows or columns and/or the order of columns.
6. Users must **NOT** leave any rows blank. The first attendee should be listed in the first available row.

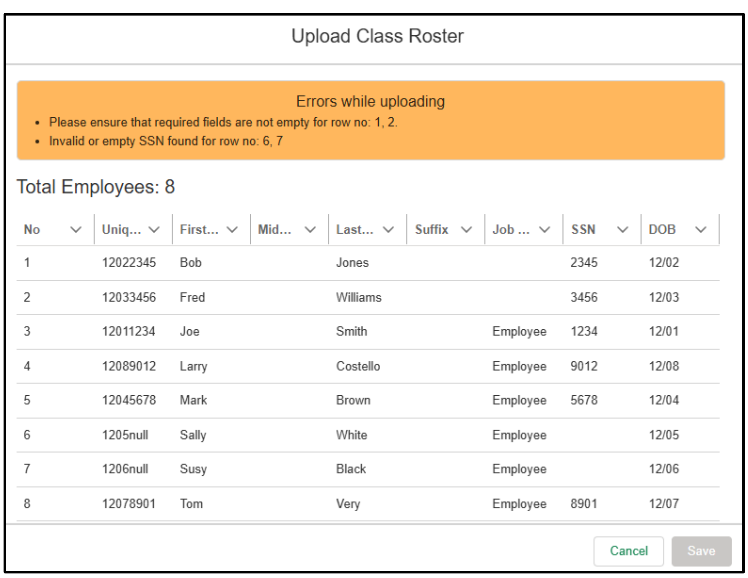


The user can add eligible attendees by clicking on the Upload Files button or dragging the saved file into the available space.



The Save button at the bottom of the screen will be available if an upload has been successful

- If the upload is successful, the user will be provided with a preview of the list of eligible attendees.
- If the upload is unsuccessful, the user will be provided with a list of errors the system encountered when trying to upload the file. In the event of failure, the file must be corrected and reuploaded before the eligible attendees appear on the class roster.

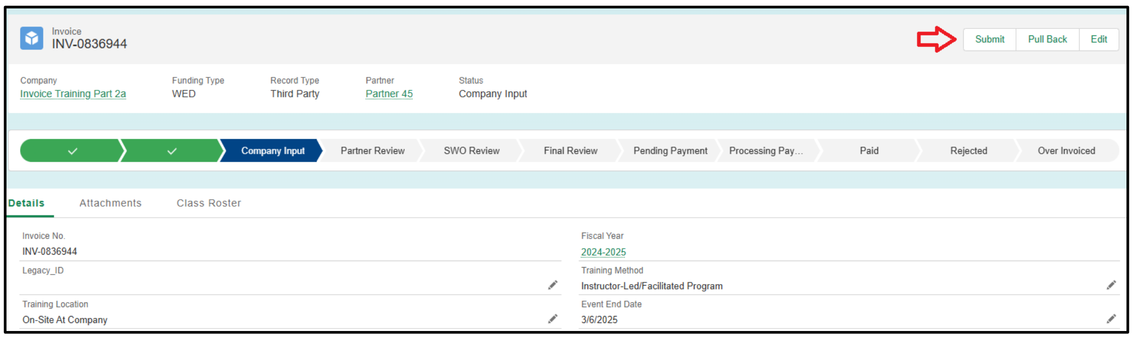


Submitting an Invoice

How do I submit an Invoice?

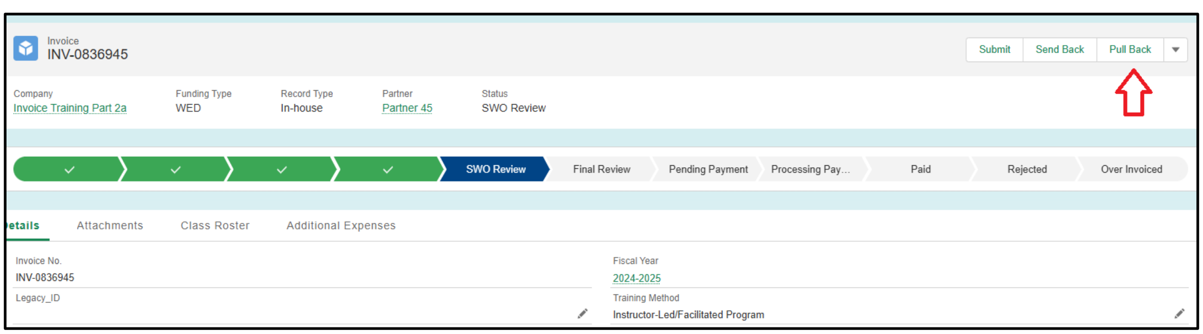
A user can submit an invoice from the Invoice screen by clicking on the Submit button. A user can only submit an invoice that is currently in **Company Input** status. This requires the invoice to meet the following criteria:

1. The Contract must be in **In Contract** status. If the contract status is Pending Acceptance, the MOA must be executed before invoices can be submitted to Partner Review.
2. All mandatory attachments have been uploaded successfully.
3. The class roster must match the number of eligible employees on the invoice.



How do I edit an Invoice that has been submitted?

Users can only edit an invoice that is in **Company Input** status or earlier in the workflow. If the invoice has not reached **Processing Payment**, the user can use the Pull Back button to pull the invoice back into **Company Input** status to make changes and resubmit. If the invoice has reached **Processing Payment** or **Paid** status, the user cannot make changes and will need to work with their WEDnetPA partner on a possible resolution.

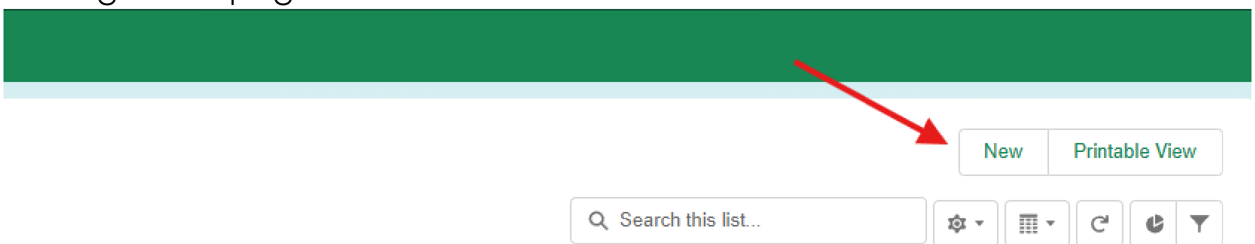


Issue Management

Companies may create tickets once they are logged onto ISAAC when they have encountered a problem or need assistance

Create a Ticket:

To create a new ticket, click the "New" button on the top right of the issue management page.

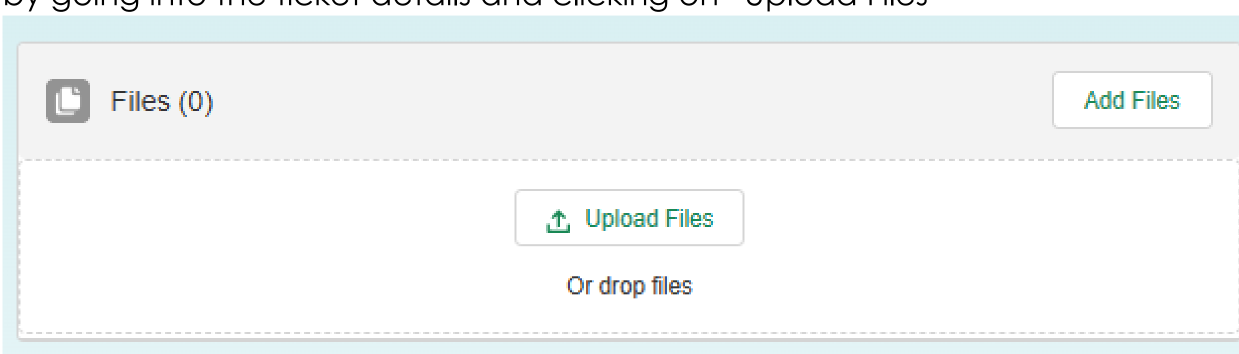


From here you can enter the information for the issue you're having.

Actual Result	The result that you see on screen, any errors received
Expected Result	The result you expected to see.
Type	The type of issue. (Bug, Error, Request Assistance)
Status	The status of the issue (Leave this as new)
Repro Steps	The steps you took to get the result
Priority	How important is this to you
Issue Detail	Summary of information
Assigned To	Who to send this report to (Select your partner)

Upload a File

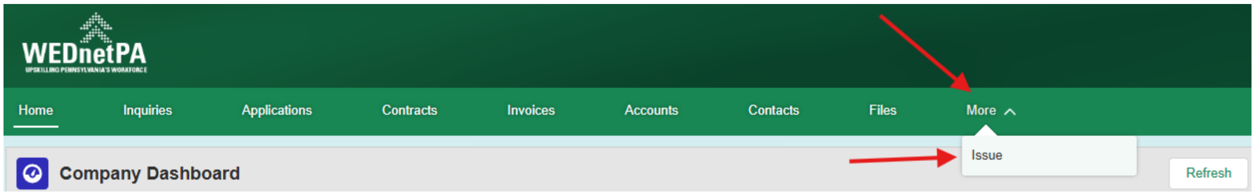
You can upload additional files (Pictures, Excel spreadsheets, Etc.) to your ticket by going into the ticket details and clicking on "Upload Files"



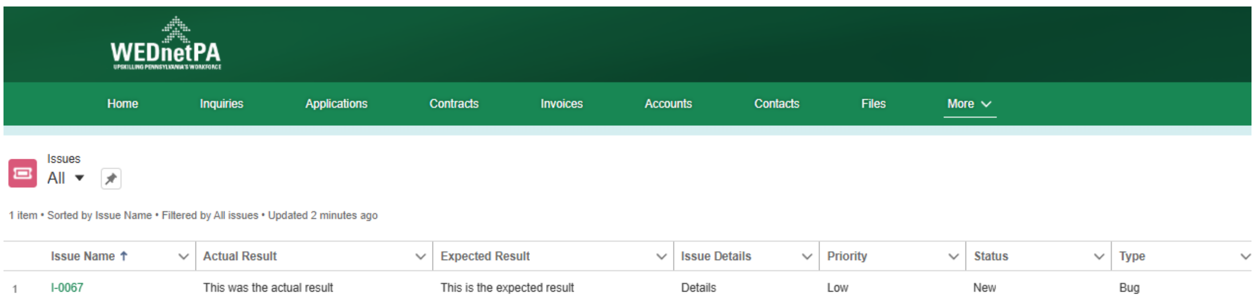
You will get a bell notification in ISAAC when your ticket is updated.

View your Ticket:

To start the process, you need to click on the "More" button on the action bar on top of the screen, then click "Issue".



This will open the issue management page where you can check previous issues.



Clicking on the issue name will open the issue details and will show you the status of the ticket.

Frequently Asked Questions

Can I create an invoice that will exceed my award amount?

Yes. Users can create an invoice that will exceed their award amount. If this happens, the system will split the invoice into two invoices, parent and child invoices. The parent invoice will reflect the remaining balance of the current award amount for the contract. The parent invoice can be submitted to Partner Review. The child invoice will reflect the over invoiced amount and will be set to **Over Invoiced** status. The child invoice cannot be submitted until additional funds have been added to the contract for the invoice to move from Over Invoiced status to Company Input status. At that time, the child invoice can be submitted to Partner Review. A partner may award additional funds to cover child invoices if additional funds become available.

What is the current cap for individual employee training?

The current cap for individual employee training for WED contracts is $2,000 per eligible employee; $3,000 per eligible employee for BusinessPA awards.

Can an employee attend more than one training event?

Yes. Employees can attend multiple training events and be reimbursed if they have not fully reached their employee cap. Employees cannot be reimbursed for duplicate identical training within the same fiscal year or partially completed training.

How do I know how much an employee will be reimbursed for?

From the Class Roster tab, a user can view the estimated reimbursement for each attendee. These figures will automatically recalculate based on several factors including, but not limited to:

1. If an employee is on multiple training events, the invoice furthest in the approval process will be given priority.
2. If the cost of training changes on an invoice.
3. If the number of eligible employees changes on an invoice.
4. If additional funds are added to the contract.
5. If an invoice is pulled back or sent back.
6. If an invoice is rejected.

This information can also be found on the Accounts' Home tab using the Company Employee Activity report.

Can I see how much each employee has left on their employee cap?

While it does not indicate what is left in an employee's cap, the Company Employee Activity report on the Account's home tab will list all the invoices that each employee is listed on and expected reimbursement.

The status of the invoice says paid, but I have not received my funds.

The status of an invoice shows that funds have been distributed to the WEDnetPA partner and the partner will process payment to the company. Payment from the WEDnetPA partner is expected to be made within 45 days to the company.

Additional questions

If you have any additional questions please contact your selected WEDnetPA partner.