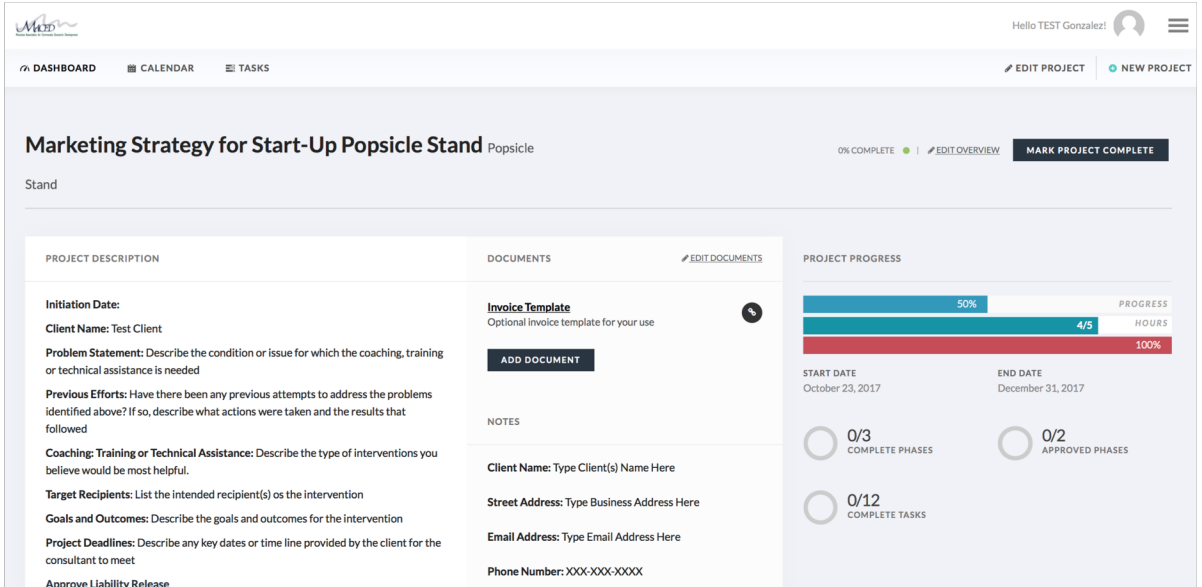


The MACED Enterprise Development team is excited to work on your technical assistance project. This project will be managed through our online project hub, where the MACED team, our consultants and clients can collaborate on projects together – providing more transparency, improving project management, and ensuring that goals and requirements have been met.



The screenshot shows a user interface for a project titled "Marketing Strategy for Start-Up Popsicle Stand". The interface includes a navigation bar with "DASHBOARD", "CALENDAR", and "TASKS". The project status is "0% COMPLETE" with an "EDIT OVERVIEW" link and a "MARK PROJECT COMPLETE" button. The main content area is divided into three columns:

- PROJECT DESCRIPTION:** Contains fields for "Initiation Date", "Client Name: Test Client", "Problem Statement", "Previous Efforts", "Coaching: Training or Technical Assistance", "Target Recipients", "Goals and Outcomes", "Project Deadlines", and "Approve Liability Release".
- DOCUMENTS:** Shows an "Invoice Template" document with an "ADD DOCUMENT" button. Below it is a "NOTES" section with fields for "Client Name", "Street Address", "Email Address", and "Phone Number".
- PROJECT PROGRESS:** Features a progress bar at 50% completion, a "PROGRESS HOURS" section showing 4/5 hours, and a "START DATE" of October 23, 2017, and "END DATE" of December 31, 2017. It also includes circular progress indicators for "0/3 COMPLETE PHASES", "0/2 APPROVED PHASES", and "0/12 COMPLETE TASKS".

TABLE OF CONTENTS

- [Getting Started](#)
 - [Logging In](#)
 - [Client Hub](#)
 - [Project Hub](#)
 - [Project Dashboard](#)
 - [Project Phases](#)
- [Approving](#)
 - [Phases](#)
 - [Invoices](#)
- [Communicating](#)
 - [Replying to project notifications](#)
 - [Commenting](#)
- [Completion](#)
 - [Consultant Evaluation](#)
- [FAQs & Troubleshooting](#)

The Technical Assistance Online Project Hub allows us to virtually collaborate throughout this project. You will need an internet connection and updated browser (Chrome and Firefox are recommended, sometimes Microsoft browsers experience glitches).

To get started with your project, please take the following steps:

1

Go to [LOANS.MACED.ORG](https://loans.maced.org) and log-in

(You can log-in via top right-hand corner by selecting log-in or by navigating to the "Individual Coaching & Consulting" page)

2

User Portal- click blue button [ACCESS MY TECHNICAL ASSISTANCE PROJECTS](#)

Now that you have a MACED account, anytime you log-in (or visit our site already logged in), you will be directed into your user portal, where you can easily navigate to your current projects or loans, update your account information, or find additional resources.

3

[CLICK ON YOUR PROJECT TO ENTER THE PROJECT DASHBOARD](#)

In this initial view you can navigate between active and completed projects in the teal menu. Most likely you will only have 1 active project at a time.

4

[REVIEW PROJECT DESCRIPTION](#)

The project description is a short summary of the problem we are solving, goals, and other pertinent information.

5

[REVIEW & APPROVE PHASE 2 PROJECT PROPOSAL](#)

Phase 1 was the initial background assessment carried out by the consultant. Phase 2 is where the consultant will outline the project goals and tasks based on their findings from the assessment. Review the project by scrolling to bottom and selecting tasks to see what the consultant has proposed. Based on your review, open the approvals section under tasks in Phase 2 and select either "Accept, Decline, or Changes Needed"

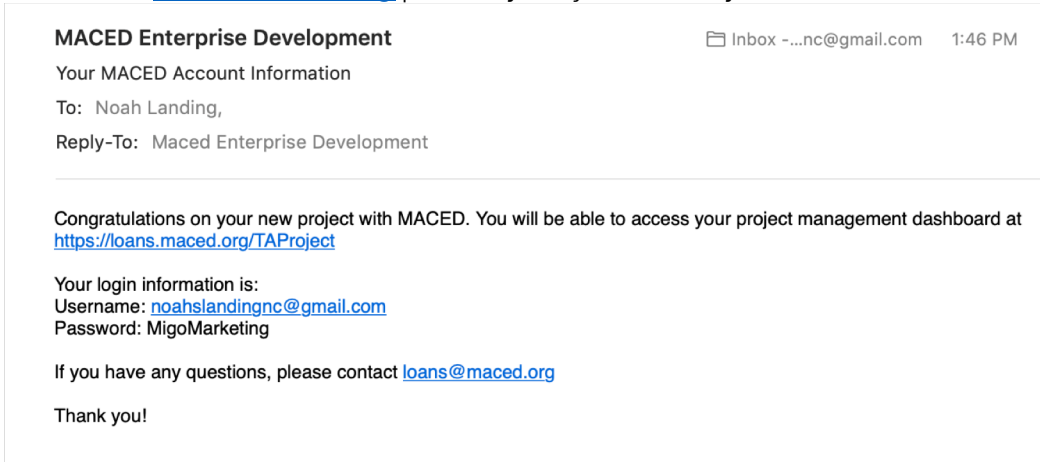
6

[MONITOR & APPROVE PROJECT](#)

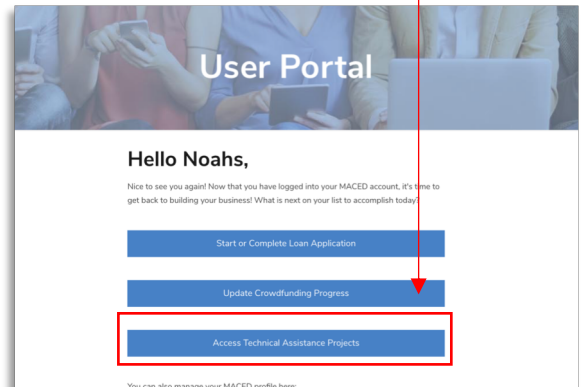
Once your project begins you will be able to monitor the progress made as the consultant checks off tasks completed vs the timeline. You will also be asked to approve invoices and work submitted by your consultant through the project dashboard

LOGGING IN:

- 1 You will receive an email with your account information
Sender: loans@maced.org | Check your junk mail if you don't see it



- 2 Log-in to your MACED Account at loans.maced.org in the top right of your screen (this is also where you can reset your password) and select Access Technical Assistance Projects from your client hub.

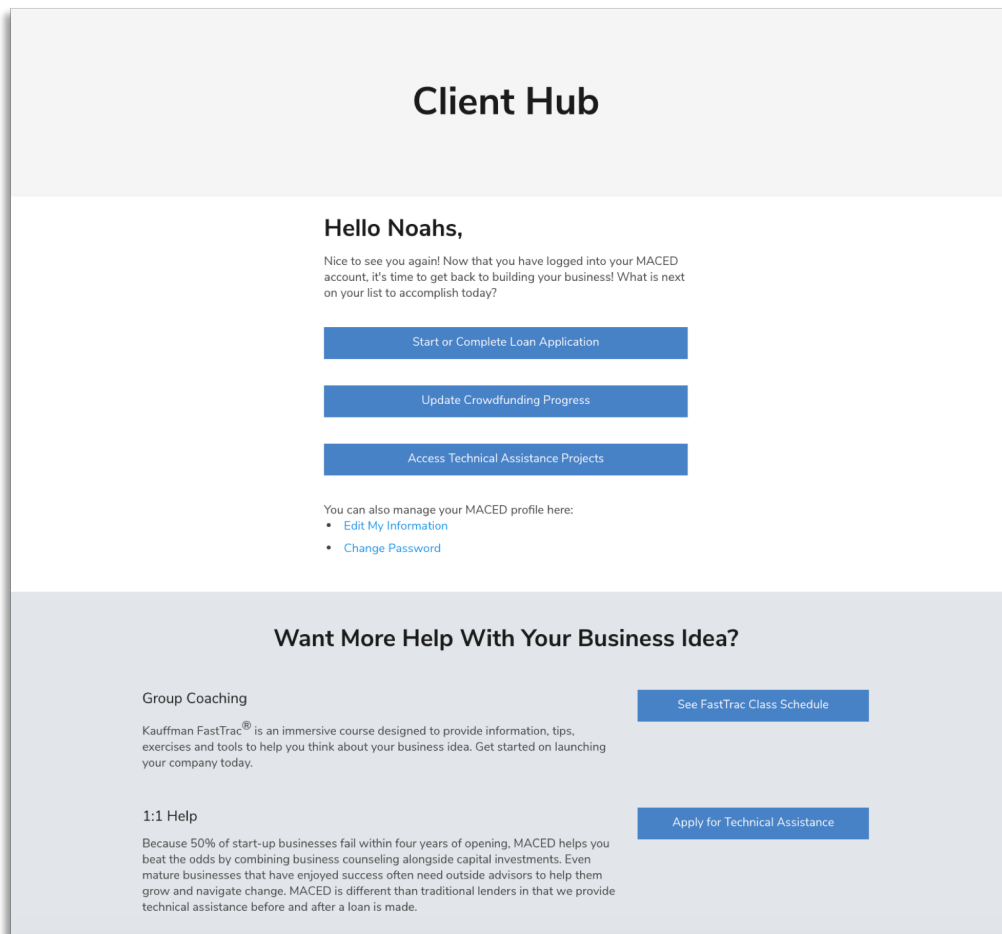


- 3 If you are already logged in when you arrive at loans.maced.org you can simply navigate to your client hub or to the Individual Coaching & Consulting page. Then click Access Technical Assistance Project Button.



MACED CLIENT HUB:

Whenever you log in at loans.maced.org you will be directed automatically directed into your user portal.



The screenshot shows the MACED Client Hub interface. At the top, it says "Client Hub". Below that, it greets the user "Hello Noahs," and provides a message: "Nice to see you again! Now that you have logged into your MACED account, it's time to get back to building your business! What is next on your list to accomplish today?". There are three blue buttons: "Start or Complete Loan Application", "Update Crowdfunding Progress", and "Access Technical Assistance Projects". Below these buttons, it says "You can also manage your MACED profile here:" followed by two links: "Edit My Information" and "Change Password". At the bottom, there is a section titled "Want More Help With Your Business Idea?" with two options: "Group Coaching" (with a "See FastTrac Class Schedule" button) and "1:1 Help" (with an "Apply for Technical Assistance" button).

You can access your client hub by logging in via the top right corner, or if you are already logged in just click "client hub".

Once inside, you can:

- Start or complete a loan application
- Update your Crowdfunding Progress (may not apply to you)
- Access Technical Assistance Projects
- Edit your profile
- Change password
- Access resources to help with your business development

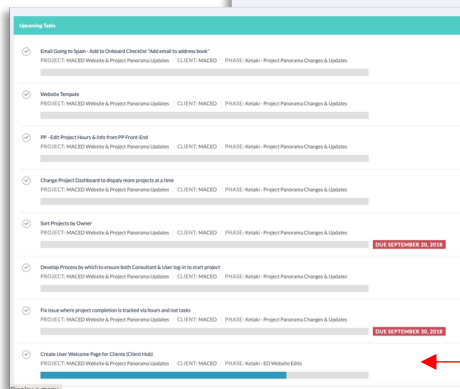
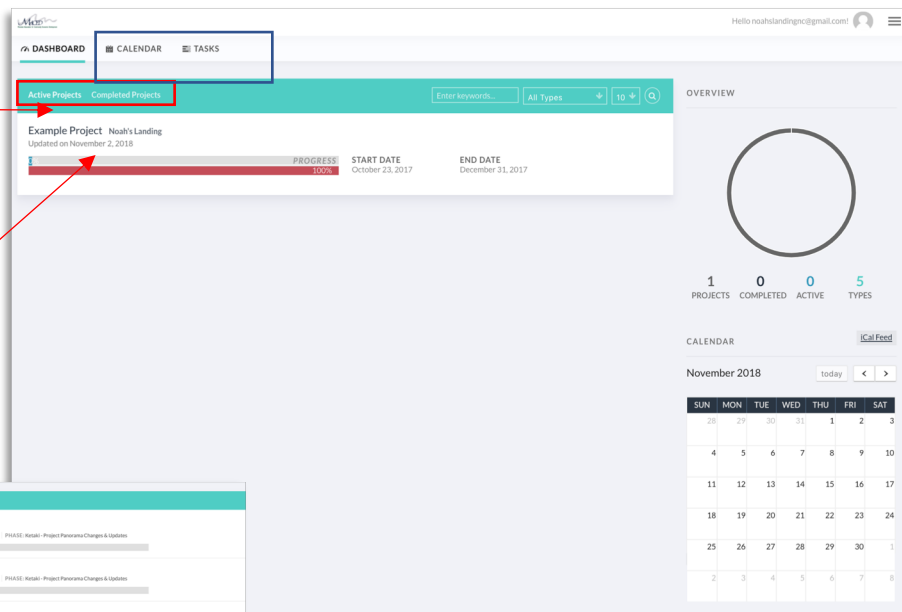
PROJECT HUB:

The project hub (www.loans.maced.org/TAProject) can be accessed by typing in the URL directly, or via clicking the “Access my TA Project” button inside your client hub or on the Individual Coaching & Consulting Page.

When you arrive in your Project Hub you will see a list of your active projects. Here you can navigate between active projects, completed projects, view the calendar for upcoming deadlines and see assigned tasks.

View active and completed projects

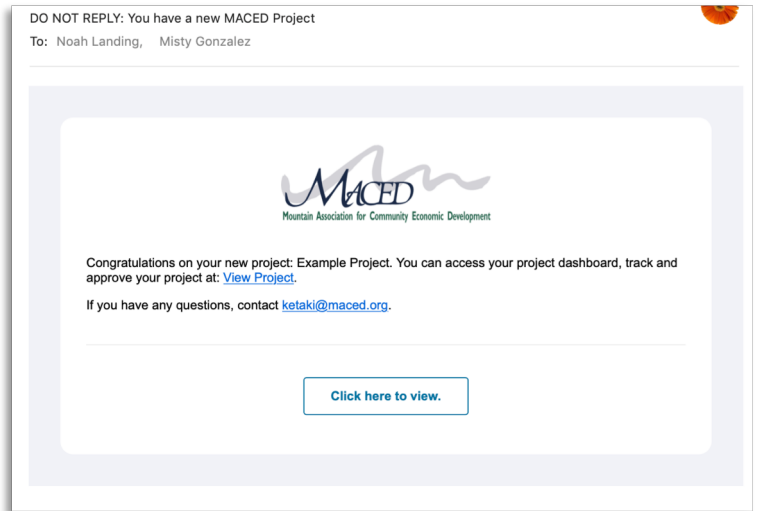
Click on a specific project to enter into the Project Dashboard



View tasks that have been set by your consultant and due dates by hitting the “Tasks” tab at the top (see blue square above).

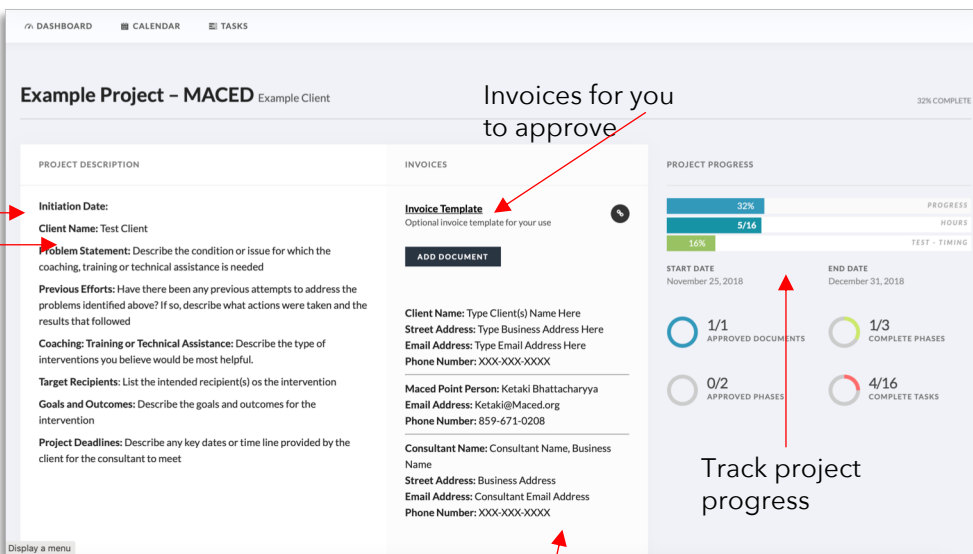
PROJECT DASHBOARD:

1 Once your project has been created, you will receive an email like the one below with links to access that project directly. If you are not already logged in when you click the link, you will be directed into your client hub and need to navigate to your project by clicking the "Access My TA Project Button" and then clicking on the title of your project in the project hub.



Inside the Project Dashboard you will be able to view and approve the project objectives, tasks, invoices and more. This is how you will track the project of your progress and communicate with parties involved.

2 At the top of the page you will see important information about your project, contact information and invoices (which you will need to approve).



Information regarding your project →

Invoices for you to approve →

Track project progress →

Contact information →

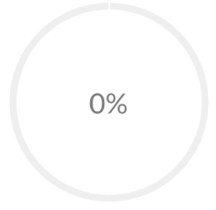
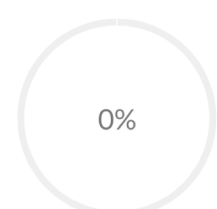
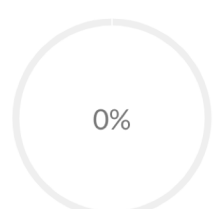
PROJECT PHASES:

3

As you scroll down, you will see your project – divided into 3 phases. You will primarily be working in Phase 2.

1. Phase 1 is the initial assessment that your consultant provided and should already be completed once you access the project. You will not need to do anything in Phase 1.
2. Phase 2 is where your consultant will propose the project based on the initial assessment that occurred in Phase 1. This will happen in the Phase 2 description and in the tasks laid out below. Be sure to review Phase 2 very closely and then approve the Phase if the project proposal meets your satisfaction.
3. Phase 3 is where the project is closed. You will be assigned a task in Phase 3 to complete a Consultant survey following the completion of your project.

Phases +EXPAND DISCUSSIONS | 0/3 COMPLETED

Phase 1 - Business Advisory Client Background Assessment	Phase 2 - Project Proposal & Management	Phase 3 - Project Delivery & Acceptance
<p>0 DOCUMENTS 0/4 TASKS 0 RESPONSES</p> <p>0/5 Hours 0/1 APPROVALS ● NOT APPROVED</p> <div style="text-align: center; margin: 20px 0;">  <p>0%</p> </div> <p>DESCRIPTION</p> <ol style="list-style-type: none"> The consultant shall conduct an on-site assessment with the client to determine the need and scope of services to resolve all identified issues as outlined in the client background assessment provided by MACED and attached herein. In addition to the background assessment provided by MACED the consultant shall consider information gathered through discussion with the client, inspection of the business facility and a review of any financial information and related material provided by the client in developing the on-site assessment. The consultant shall present a written assessment report to MACED staff outlining their findings and the course of action needed to resolve all issues. Said report shall include: <ul style="list-style-type: none"> A summary of their findings, a detailed description of the type of technical assistance needed and a projection of the number of hours needed to provide said services. If the type of technical assistance needed is beyond the expertise of the consultant said technical assistance needs shall be 	<p>0 DOCUMENTS 0/3 TASKS 0 RESPONSES</p> <div style="text-align: center; margin: 20px 0;">  <p>0%</p> </div> <p>DESCRIPTION</p> <p>Summary of business advisory scope of work: Type your project proposal outline here</p> <p>List of deliverables the consultant will provide the client during the course of providing technical assistance: Type your project deliverables here</p> <p>The outcomes the client is expected to achieve at the conclusion of the engagement: Type outcomes the client is expected to achieve here</p> <p>Timeline for Project:</p> <p>Project Hours:</p> <p>Hourly Rate:</p> <p>Total Project Cost:</p> <p>MACED Responsible Portion:</p> <p>Client Responsible Portion:</p> <p>Invoices: Consultant should upload invoices to the documents section to the right. Consistent with the MACED Scope of Work Guidelines, the consultant shall submit an invoice to MACED by the 15th day of each calendar month.</p> <p>Additional Expenses: List any additional expenses, like travel, software, etc.</p>	<p>0 DOCUMENTS 0/5 TASKS 0 RESPONSES</p> <div style="text-align: center; margin: 20px 0;">  <p>0%</p> </div> <p>DESCRIPTION</p> <p>Date of Project Delivery: What date is the project delivered</p> <p>Project Completion Summary: Consultant should provide a short summary of project completion, including any links to any deliverables or attach deliverables below as attachments</p> <p>Client: Upon reviewing deliverables, the client should approve or decline project completion. If client declines completion, please notify in the discussion what deliverables have not been provided up to standard. Upon final acceptance, client should complete survey here https://loans.maced.org/consulting-services-project-evaluation-form/</p> <p>MACED Point Person: Once all deliverables have been met, MACED Point Person should approve the project as completed. At this time the project will be considered closed, but link will remain available for client to access their deliverables.</p>

APPROVALS:

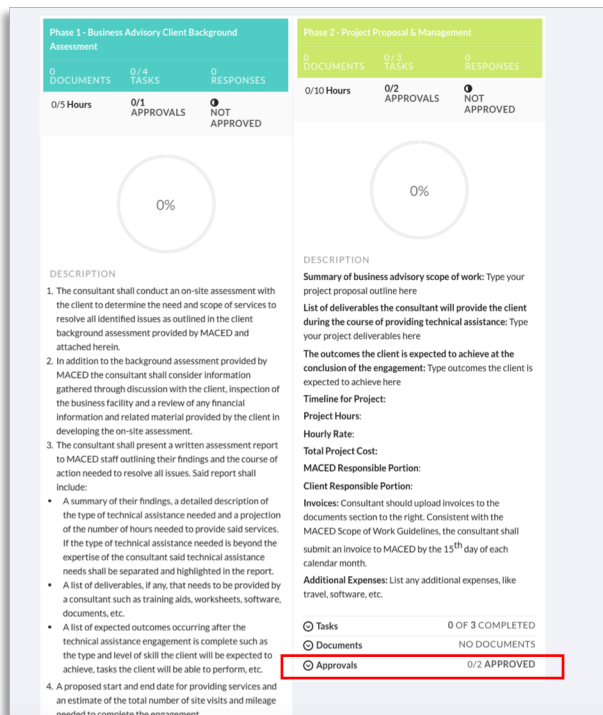
4

- As part of your project requirements, you must approve two things:
1. The project proposed by your consultant in Phase 2.
 2. Invoices submitted by your consultant for work completed.

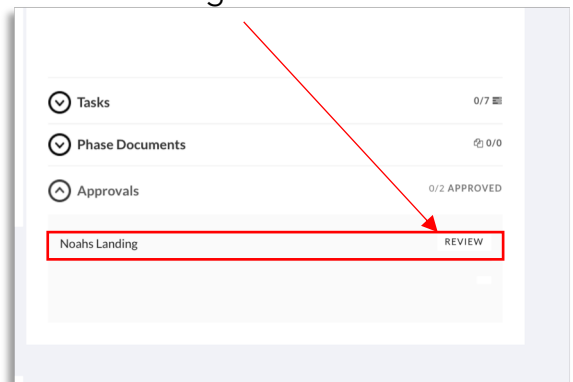
APPROVING PHASES

Navigate to the bottom of the phase you are approving (Phase 2).

Expand the approvals list by clicking on the arrow, find your name and click the button to the right of it.

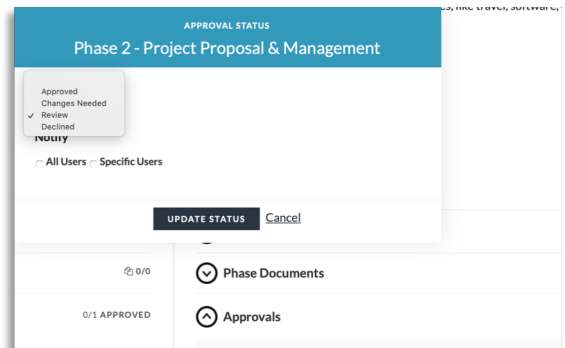


The screenshot shows two side-by-side panels for Phase 1 and Phase 2. Phase 2 is highlighted in green. At the bottom of the Phase 2 panel, there is a list of items: Tasks (0 of 3 Completed), Documents (NO DOCUMENTS), and Approvals (0/2 APPROVED). The Approvals item is highlighted with a red box.

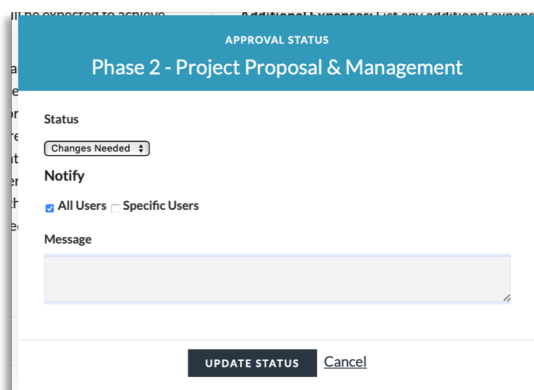


This screenshot shows a list of items under the 'Approvals' section. A red arrow points to a 'REVIEW' button next to the entry 'Noahs Landing'.

In the pop-up box select approve, decline or changes needed based on your assessment of the proposal



The screenshot shows a pop-up box titled 'APPROVAL STATUS' for 'Phase 2 - Project Proposal & Management'. It has a dropdown menu with options: 'Approved', 'Changes Needed', 'Review', 'Declined', and 'Cancel'. The 'Review' option is selected. Below the dropdown are buttons for 'UPDATE STATUS' and 'Cancel'.



This screenshot shows the bottom part of the 'APPROVAL STATUS' pop-up box. It includes a 'Message' field with a text area and a 'UPDATE STATUS' button with a 'Cancel' link next to it.

Once a selection is made, you will have the opportunity to notify the other project participants and can add a message explaining your reason for declining or the changes requested if you do not approve.

APPROVALS:

APPROVING INVOICES

Example Project - MACED Example Client

PROJECT DESCRIPTION

Initiation Date:

Client Name: Test Client

Problem Statement: Describe the condition or issue for which the coaching, training or technical assistance is needed

Previous Efforts: Have there been any previous attempts to address the problems identified above? If so, describe what actions were taken and the results that followed

Coaching: Training or Technical Assistance: Describe the type of interventions you believe would be most helpful.

Target Recipients: List the intended recipient(s) as the intervention

Goals and Outcomes: Describe the goals and outcomes for the intervention

Project Deadlines: Describe any key dates or time line provided by the client for the consultant to meet

INVOICES

Invoice 1 REVIEW
Please Approve

Invoice Template
Optional invoice template for your use

ADD DOCUMENT


Client Name: Type Client(s) Name Here
Street Address: Type Business Address Here
Email Address: Type Email Address Here
Phone Number: XXX-XXX-XXXX

Maced Point Person: Ketaki Bhattacharyya
Email Address: Ketaki@Maced.org
Phone Number: 859-671-0208

Consultant Name: Consultant Name, Business

Invoices will be located at the top of your project dashboard

INVOICES

Invoice 1 REVIEW 
Please Approve

Click on the invoice 1 text to download a copy of the invoice, and then click on the review text next to the invoice to update the status to approved or declined based on your review.

Update Status

Approved
Changes Needed
✓ Review
Declined

Notify

All Users Specific Users

Message

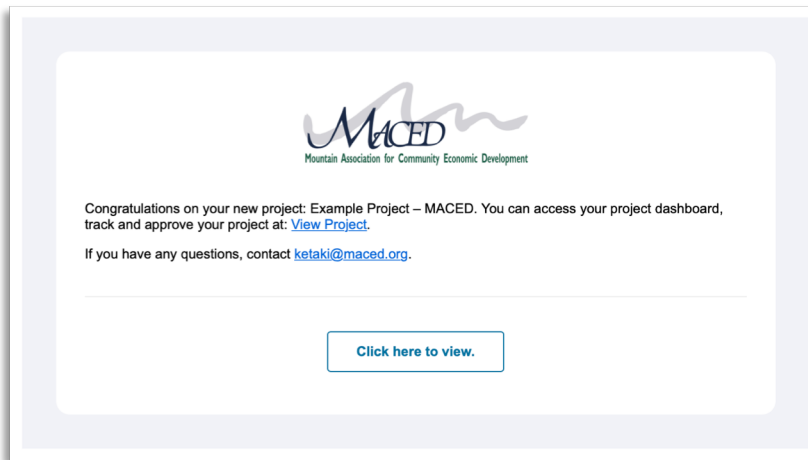
UPDATE Cancel

Change the status to approve, declined or changes needed based on your review of the invoice. Please then check to notify "ALL USERS" of your invoice update.

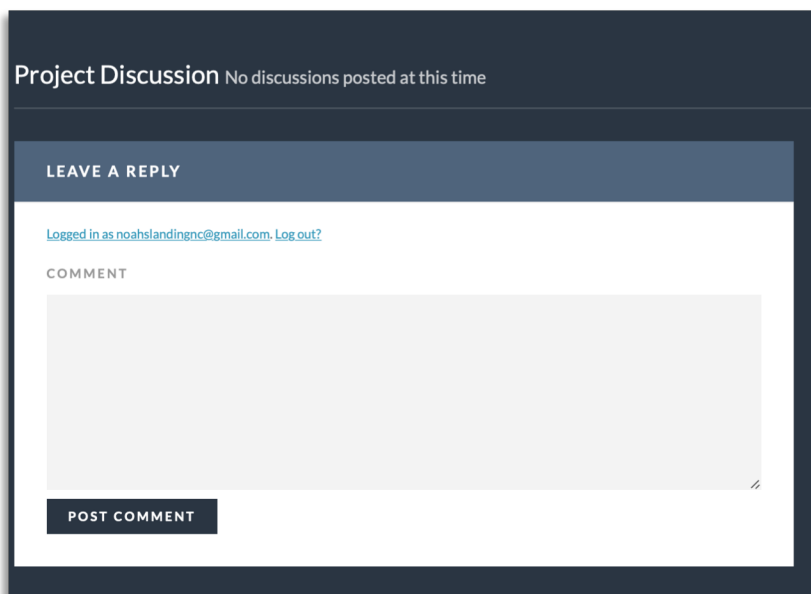
You can add a message regarding changes needed or any notes if you like.

COMMUNICATING

Communicating back and forth on your project is important for making sure your consultant and the MACED team know what your needs and expectations are. Below are helpful tips in communicating.



You will receive email notifications whenever new invoices have been added to the project or changes have been made. We ask that you not reply to the email notifications with your response, but rather navigate into the project dashboard and respond accordingly.



At the bottom of each project dashboard you will find a project discussion section where you can post and reply to comments. This is a great place to add notes regarding project tasks, timelines, expectations, changes so that they can be tracked and referenced by all parties involved.

When approving phases or invoices you also have the opportunity to send a message to your consultant and MACED team member. This message will be delivered via email as a project notification. If you would like it recorded in your project dashboard be sure to also copy your message to the project discussion section.

PROJECT COMPLETION

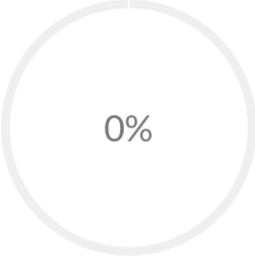
Upon completion of your project, all final invoices should be reviewed and approved by the you, the client. Be sure that you have received all project deliverables as expected:

- Do you have all necessary files relevant to your project.
- Do you have proper training for moving forward without your consultant.
- If applicable, do you have all necessary log-in information for any programs you may be utilizing.
- If applicable, have you been made the administrator of any programs you might be using.
- If applicable, have you set up any recurring billing for programs with your payment information.

Once you have received all items and information necessary to maintaining the success of your project, please complete the Consultant Evaluation Survey. You will find the link in Phase 3 - click on it, and complete the form.

Phase 3 - Project Delivery & Acceptance

0 DOCUMENTS
0/5 TASKS
0 RESPONSES



0%


DESCRIPTION

Date of Project Delivery: What date is the project delivered

Project Completion Summary: Consultant should provide a short summary of project completion, including any links to any deliverables or attach deliverables below as attachments

Client: Upon reviewing deliverables, the client should approve or decline project completion. If client declines completion, please notify in the discussion what deliverables have not been provided up to standard. Upon final acceptance, client should complete survey here <https://loans.maced.org/consulting-services-project-evaluation-form/>

MACED Point Person: Once all deliverables have been met, MACED Point Person should approve the project as completed. At this time the project will be considered closed, but link will remain available for client to access their deliverables.



Consulting Services Project Evaluation Form

Consulting Services Project Evaluation

Did you recently complete a business advisory project with one of our referred consultants? Please provide feedback on that project and your experience with the consultant here.

Your First Name

Your Last Name

Your Business Name

Point Person in Your Organization

Who was the person within your organization working directly with the consultant

Your Phone Number

Your Email Address

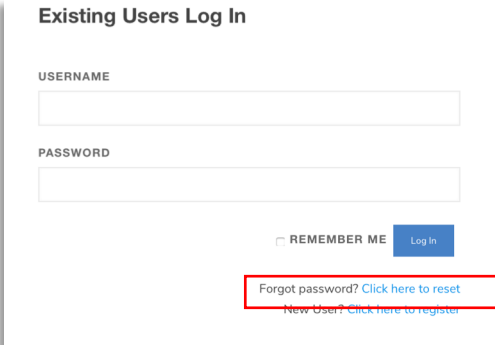
Consultant You Worked With

FAQs & TROUBLESHOOTING

How do I change my password?

There are 2 ways to change your password.

- 1) Click on the “log-in” button in the top right corner. Below the log-in area is “Forgot Password”, you can click to reset your password and an email with a reset password link will be sent to you.
- 2) If you are already logged in and would like to change your password, click on “Client Hub” in the top right corner and you will be able to do so within your client hub.



Existing Users Log In

USERNAME

PASSWORD

REMEMBER ME

Forgot password? [Click here to reset](#)
New User? [Click here to register](#)

What if I can't remember my username

Your username is your email address.

What if I can't remember the web address for my project?

That's fine, there are plenty of ways to locate your project when you log-in.

Refer to the slide on [logging-in](#) and [project hub](#)

Some quick links to guide you:

[Client Hub - https://loans.maced.org/user-portal/](https://loans.maced.org/user-portal/)

[Technical Assistance Project Hub - https://loans.maced.org/TAProject/](https://loans.maced.org/TAProject/)

[Log-in - https://loans.maced.org/login/](https://loans.maced.org/login/)

[Web Support - https://loans.maced.org/website-support/](https://loans.maced.org/website-support/)