



Beam Platform Training Guide

ECMC | Project Success

February 2025

ECMC | **beam**
Formerly edquity⁷

OVERVIEW

Beam has partnered with Educational Credit Management Corporation to help your college partners distribute emergency funds more quickly and efficiently. Beam helps partners create smart and automated infrastructure to administer financial assistance, direct cash assistance, and public benefits to those most in need. Our end-to-end technology platform simplifies applications and aids in decisioning and processing, while streamlining compliance, reporting, and case management into a single system.

The following Guide provides information on platform management, vendor payments, application tracking, applicant profiles, and the student-facing application.

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STUDENT APPLICATION SECTION

In this section we'll review:

- Creating a student account and log-in information
- The student emergency aid application
- The student application portal

Creating a student account and log-in information

Students must create an account through Beam to access the application.

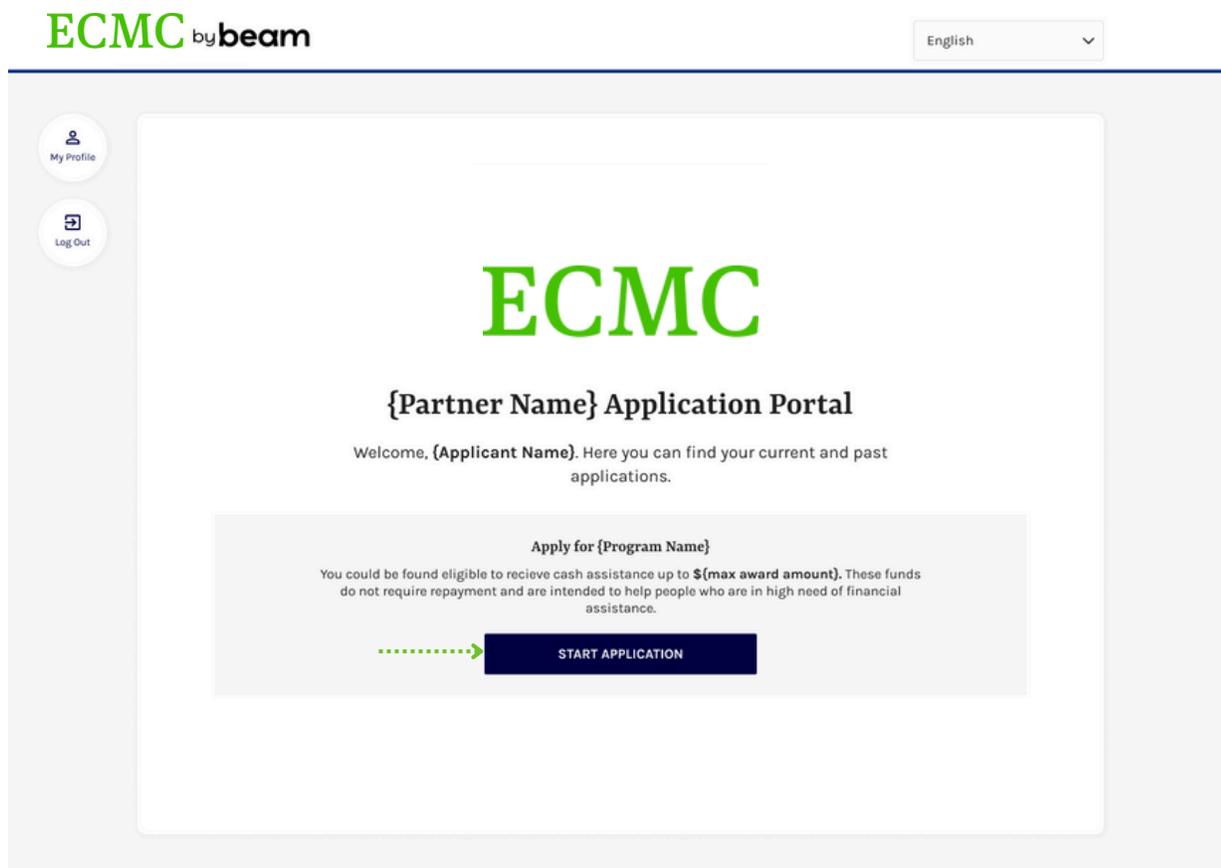
The screenshot shows the ECMC Applicant sign in page. At the top left is the ECMC logo. At the top right is a 'Select Language' dropdown menu. The main heading is 'Applicant sign in'. Below the heading is an 'Email Address *' input field. Below that is a grey box with an information icon and the text 'Are you reviewing cases?'. Underneath this is a link: 'The sign in page for case workers has moved → SIGN IN TO REVIEW CASES'. At the bottom are two buttons: a blue 'SEND ME A LINK' button and a white 'USE A PASSWORD' button.

Annotations on the right side of the page:

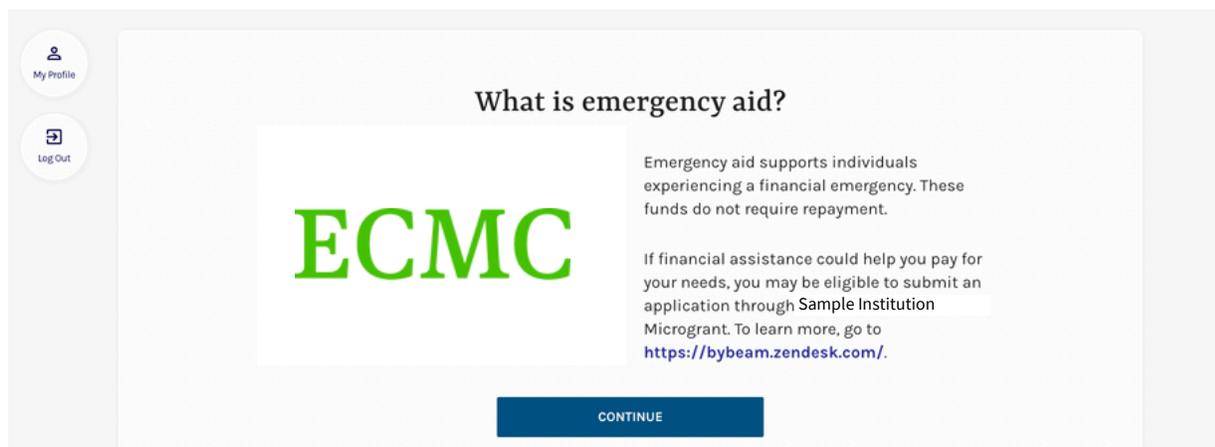
- An arrow points from the 'Applicant sign in' heading to the text: 'Each school will have their own **unique link** to the Beam platform.'
- An arrow points from the 'Email Address *' input field to the text: 'We recommend all applicants sign up using their school email address. **Students must use the same email address for each application.**'
- An arrow points from the 'SEND ME A LINK' button to the text: 'New students can send themselves a **link to log in** for a passwordless authentication.'

The student emergency aid application

Once students are logged in, they will be prompted to start an application.



Applicants will then be taken to the initial prompt screen.



The student application portal

Once students enter the application, they will be asked a series of questions pertaining to their situation.

Welcome, Mary Jane!

Below, you'll find an overview of the different sections of the application and what you can expect in each section.

Application Sections

Personal Info ^
You'll let us know what month and year you expect to graduate, if you've filed a FAFSA for the 2020-2021 academic year, if you receive financial aid and if you're responsible for taking care of any minors.
Financial Challenges v
You & Your Situation v
Document Upload v

Students will be asked questions based on the financial challenges that they select.

BEGIN APPLICATION

Supporting Documents

Please upload supporting documents related to the challenge area(s) indicated in your application. This is a required step.

Supporting Documents

Documents should clearly indicate the name and contact information of the company or payee, along with your name and account information. After you scan your document(s), please preview it to make sure that all key information is visible before uploading it. Ideally, the documents uploaded were received in the last 30 days.

The following types of documentation can be uploaded for our review process (but are not limited to):

- Current signed lease in your name (or your name on the lease) or a notarized statement from your landlord/rental company
- Current mortgage statement
- Itemized car repair estimate
- Car loan payment statement
- Utility bill
- Childcare

UPLOAD

EXAMPLE DOCUMENT.PNG X

Students will be able to upload documents to support their financial need request.

These documents will only be viewed by Milwaukee Area Technical College to verify your needs. This is a safe and secure portal.

CONTINUE

PROGRAM ADMINISTRATOR DASHBOARD

In this section we'll review:

- Admin Login
- Admin Dashboard View
 - Fund Metrics & Student applications
- Application Case Page
 - Application Overview
 - Change of Status/Expediting
- Applicant Profile

Logging in as an Admin

Program administrators have a **separate login page**, which can be accessed from the main applicant login page or directly through a link that follows the format: `app.bybeam.co/partner/{customschoolURL}`

Applicant sign in

Email Address *

i Are you reviewing cases?

The sign in page for case workers has moved → [SIGN IN TO REVIEW CASES](#)

SEND ME A LINK

USE A PASSWORD

Case Manager Sign In

ECMC

Email

Email

Email a sign in link

We'll email you a link for a secure password-free sign in. Or you can enter your password instead.

i Not a case manager? Go to the Applicant Portal to access your account.

Admins can send themselves a link to log in.

Admin Dashboard View

This dashboard provides a snapshot overview of fund availability, application statuses, and application volume. **Students must use the same email address for each application to mitigate the instance of duplication of applications.**

The screenshot shows the ECMC Admin Dashboard. On the left is a navigation menu with options: Programs Dashboard, Applicants, My assignments, Settings, Help, and Logout. The main content area is titled 'ECMC Project Success Partner' and 'Programs'. Under 'Project Success Emergency Aid Fund', there is a 'VIEW DETAILS' link and a summary table:

Available Funds	Obligated Funds	Awarded Amount
\$10,000	\$0	\$0

Below this is the 'All Cases' section with a search bar, a filter icon, and a table with columns: Name, Submission Date ↑, Program Name, Case Status, Tags, and Assignee. The table currently shows 'No data available'. At the bottom, there are pagination controls: 'Items per page 15', '1-0 of 0 items', and '1 of 1 pages' with navigation arrows.

Real-time tracking of fund disbursement and availability

Click here to **view all applications and their status**. This will open up the view below.

This screenshot shows the 'Cases' view for the 'Project Success Emergency Aid Fund'. The top navigation includes 'Cases' and 'Program Details'. Below the navigation are filters for application status: My Assignments (0), In Progress (0), Incomplete (0), **Ready To Review (0)**, In Review (0), and Approved (0). The main table has columns: Name, Submitted ↑, Case Status, Payment Status, Awarded Amount, Tags, and Assignee. It also shows 'No data available'. The pagination controls are 'Items per page 150', '1-0 of 0 items', and '1 of 1 pages'. On the right side, there is a 'Program Funding' summary table:

Program Funding	
Project Success - ECMC Fund	
Available Funds	\$10,000
Obligated Funds	\$0
Awarded Amount	\$0

Below the funding table is a 'Last 7 Days' summary table:

Applications Started	0
Applications Submitted	0
In Review	0
Payments Sent	0
Approved	0
Denied	0

Application Case Page

Program Administrators will be able to manage the status of a student's application from this page, including payment options. Access this page by selecting the student's name.

Applications **cannot be approved** until the amount is entered in the "Request Summary"

APPLICATION: READY FOR REVIEW

Testing applicant

INITIATE PAYMENT DENY

Student Emergency Assistant Grant Application Overview

APPLICATION ID	SUBMITTED	NEED LEVEL	STATUS
A000040361	06/30/2023	N/A	Ready for Review

ASSIGNEE	APPLICATION CREATED BY	PAYMENT STATUS	AMOUNT REQUESTED
Pending	Testing applicant	N/A	\$200

Applicant Details

USER ID	PHONE	EMAIL	MAILING ADDRESS
U000044377	(555) 555-5555	leticia.chao@...	2243red, 23erfg, GU 3322

TAX ID/SSN	ACCOUNT TYPE	ROUTING NUMBER	ACCOUNT NUMBER
-	-	-	-

Review the applicant's full set of responses or edit their application as needed.

Applications can also be denied or marked as "incomplete" if more information is needed from the applicant.

For applications marked, "incomplete", students will receive and email with details entered in the "Reason for Incomplete" screen

Request Summary

After saving the required information below, select the Initiate Payment button at the top of the page.

AVAILABLE FUNDS	-	APPROVED AMOUNT	=	REMAINING FUNDS
\$8,530.76		\$500.00		\$8,030.76

Fund * ClaimFun... Requested Amount \$ 200.00 Approved Amount * \$ 500.00 EDIT

To approve an application, add the amount they are approved for here.

Documents

UPLOAD DOCUMENT

Notes

+ ADD NOTE

Larry Hogan 1/18/2023 at 11:11 AM
Student in office mentioned that they also had food insecurity.

You can add documents to the application profile. To view documents uploaded by the student, select the "View/Edit Application" button.

Add notes as needed related to this case.

Application Case Page – Change of Status & Expediting

Program Administrators will be able to manage the status of a student's application from this page, including case management functionality. Access this page by selecting the student's name.

Testing applicant INITIATE PAYMENT DENY ⋮

MATC Student Emergency Assistant Grant Application VIEW/EDIT APP

Overview

APPLICATION ID	SUBMITTED	NEED LEVEL	STATUS
A000040361	06/30/2023	N/A ⓘ	Ready for Review
ASSIGNEE	APPLICATION CREATED BY	PAYMENT STATUS	AMOUNT REQUESTED
Pending	Testing applicant	N/A	\$200

By selecting "Change Status or Assignee", you can alter the status of the application to any of the statuses listed below (see more on the following page)

Update Workflow ×

Select a status:

- Incomplete
- Ready for Review
- In Review
- Denied
- Payment Sent
- Withdrawn
- Archive

By selecting "Expedit", you will be able to add an indicator to the application that denotes it as a high priority within the application dashboard.

Reason for Expediting ×

Reason for expediting*
Sample

EXPEDITE CANCEL

<input type="checkbox"/> Name	Submitted ↑	Need Level Tier ⓘ
<input type="checkbox"/> Testing applicant	06/30/2023	N/A
C000043775		

Application Case Page – Marking Incomplete & Denied

Applications can also be denied or marked as "incomplete" if more information is needed from the applicant. For applications marked, "incomplete", students will receive an email with details entered in the corresponding screens.

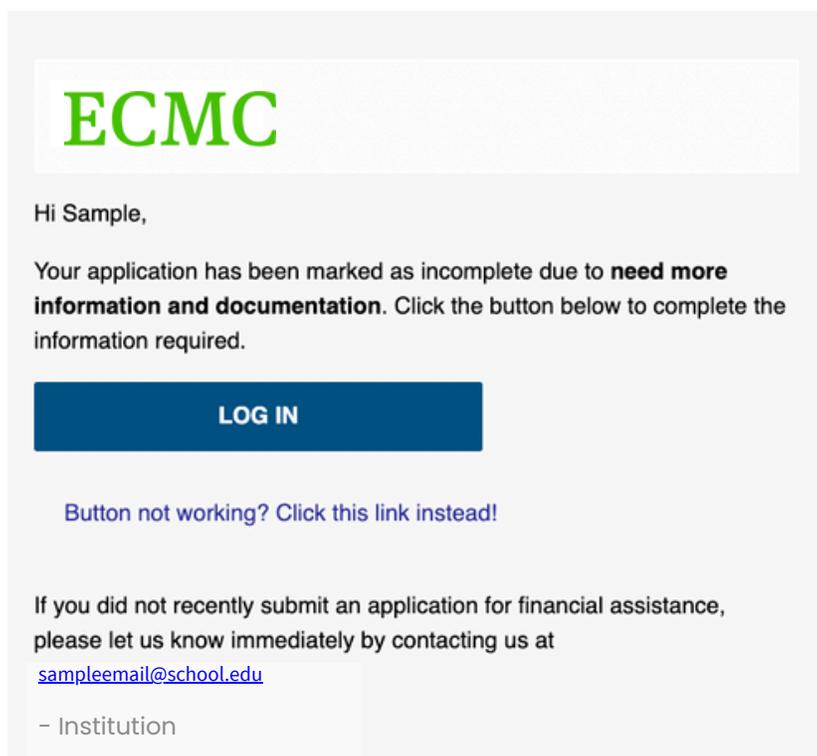
Reason for Incomplete Screen

A screenshot of a web form titled "Reason for Incomplete". It features a text input field with the placeholder text "Reason for Incomplete*". Below the field are two buttons: "MARK AS INCOMPLETE" (highlighted in orange) and "CANCEL".

Reason for Denial Screen

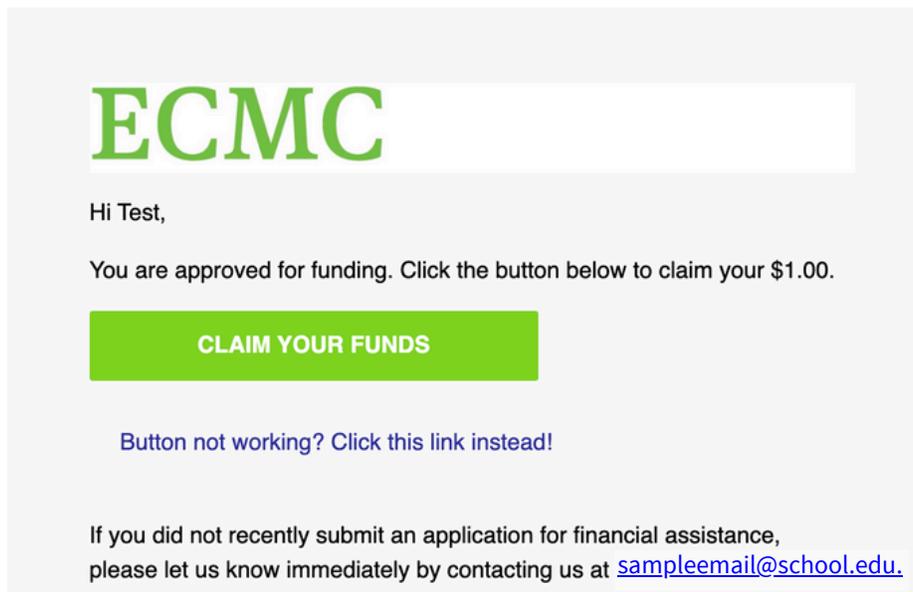
A screenshot of a web form titled "Reason for Deny". It features a text input field with the placeholder text "Reason for Deny*". Below the field are two buttons: "MARK AS DENY" (highlighted in orange) and "CANCEL".

The student will then receive the following email containing the message indicated in the text prompts **bolded**.



Application Case Page – Approving an Application

Applications that are approved through Beam will send an email notification to the student to let them know they were approved and to prompt them to log back into their account to claim their award.



When they log back into their account, they will see a “Claim your Funds” button. This is where they will get to select their preferred payment method to receive the funds.

ECMC

Application Portal

Welcome **Test Applicant**. Here you can find your current and past applications.

2023-2024 Project Success Emergency Aid Fund

Status: Application Approved

You are approved for funding! Click the button below to claim your \$1.00. These funds do not need to be repaid.

CLAIM YOUR FUNDS

Applicant Profile

Program Advocates can review an individual's full applicant profile, which contains details pertaining to the individual's details, any applications submitted, payments received, Program Advocate notes, and documents uploaded. The sections can be seen below:

Applicant overview: This section contains the user ID associated with the individual's organization, phone number, email address, and mailing address (if applicable).

APPLICANT PROFILE

Tommy Pickles

Applicant Overview		EDIT APPLICANT DETAILS	
USER ID	PHONE	EMAIL	MAILING ADDRESS
U000045606	(901) 359-2802	zeke.sansing+...	-

Additional information: Program Advocates will be able to review information based on their configuration preferences, including supporting documentation (such as Photo ID).

Additional Information ^

RACE American Indian or Alaskan Native Other or Mixed Asian Japanese Cambodian Native Hawaiian or Other Pacific Islander Native Hawaiian	PREFERRED READING LANGUAGE English	PREFERRED SPEAKING LANGUAGE English	PHONE NUMBER (347) 363-0212
HOUSEHOLD REPRESENTATIVE Yes	CURRENTLY EMPLOYED No	HOUSEHOLD MEMBERS First Name: Test Last Name: Support Date of Birth: 02/10/2023 What is your relationship with this person?: Dependent	
EMPLOYMENT Job Title: Batman Employer Name: Gotham Type of employment is this?: Full-time Employer Address: Gotham City Employer phone number: (712) 392-0923		SUPPORTING DOCUMENTATION <div style="border: 1px solid #ccc; border-radius: 5px; padding: 5px; display: inline-block;"> GRIN_SMILE.PNG </div>	

Notes + ADD NOTE ^

- Mary Sherman** Applicant Profile on 6/30/2023 at 10:07 AM
 Sample 3 (edited)
- Mary Sherman** Cash Assistance on 6/30/2023 at 10:07 AM
 Sample 2
- Mary Sherman** Applicant Profile on 6/30/2023 at 10:07 AM
 Sample 1

Applicant Profile

Application Overview Tab: All Programs, Applications, and Payments can be accessed through the multi-tab Application Overview Tab. You will be able to view all programs, applications, and payments associated with the individual.

Programs		Applications	Payments		
<input type="text" value="Search"/> + ADD NEW APPLICATION					
Application ID	Program Name ↑	Case Status	Decision Date	Payment Status	
A000070327	Cash Assistance	Payment Sent	06/22/2023	-	
A000070328	Cash Assistance	Archive	-	-	
Items per page: 5 1-2 of 2 items		1 of 1 pages ← →			

Adding a New Application on Behalf of Individual: If A new application is added, pre-filled answers will appear for the applicant profile fields. Program Advocates can also select which program they would like to complete for the individual.

- o **Creating new versions:** If a new application version is created for an application the advocates answers will be the new source of truth and what will be presented to the applicant.

Add New Application

Please select the program(s) you'd like to create an application for **Prime Test**.

Program Name *

Cash Assistance

Cash Assistance

ADD NEW APPLICATION
CANCEL

Prime Test

ⓘ You are now creating a new application SAVE AS NEW APPLICATION CANCEL

Applicant Information Section Completed ● EDIT

What is your race and/or ethnicity?

Race*
American Indian or Alaskan Native, O...

What language do you prefer to read?

Preferred language for reading*
English

What language do you prefer to speak?

Preferred language for speaking*
English

What is your phone number?

The new application will now show under the "Applications" tab in the Applicant Profile

Programs		Applications	Payments		
<input type="text" value="Search"/> + ADD NEW APPLICATION					
Application ID	Program Name ↑	Case Status	Decision Date	Payment Status	
A000070327	Cash Assistance	Payment Sent	06/22/2023	-	
A000070328	Cash Assistance	Archive	-	-	
A000071806	Cash Assistance	Incomplete	-	-	
Items per page: 5 1-3 of 3 items		1 of 1 pages ← →			

← New Application

RELEVANT FAQ PAGES

Application Configuration

- [Application Tiering & Scoring](#)

General Application Questions

- [Viewing Submitted Application Documents](#)
- [Changing the Decision on an Application](#)
- [Viewing Payment History](#)

POINTS OF CONTACT

ECMC | Project Success

Brenda McCafferty - ECMC Outreach Director | bmccafferty@ecmc.org

Bridget Ellis - ECMC Outreach Director | bellis@ecmc.org

Tom Bailey - ECMC Outreach Director | tbailey@ecmc.org

Beam

Program questions should be directed to your ECMC Outreach Director but any technical inquiries about the Beam platform can be sent to support@bybeam.co.

SUPPORT RESOURCES

Beam Zendesk for Program Administrators (College Admins)

<https://beampartners.zendesk.com/hc/en-us>

Beam Zendesk for Applicants (College Students)

<https://bybeam.zendesk.com/hc/en-us>