



HOW TO USE GENIE

User Manual

Yukon Education - Labour Market Programs and Services

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1 What is Genie?

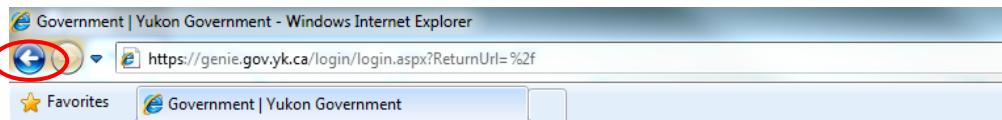
Genie is a web-based system that helps the Yukon government to manage labour market program funding agreements with organizations. It also helps service providers meet their obligations more efficiently by allowing them to do a variety of functions online, such as

- Submit funding applications for specific programs
- Submit activity and financial reports
- Maintain the organization's contact information
- Share information securely, privately and efficiently
- View current and past (Genie administered) agreements
- Online case management for organizations that provide Employment Assistance Services (EAS) to Yukoners;
- View payment/cheque history
- Gain access to ongoing program and IT support.

System requirements:

- Internet Explorer - for Explorer 9 or newer versions, please use the Compatibility Mode
- Adobe Reader version 9.3 or higher
- Do not use Google Chrome as it is not compatible with Genie.

TIP: Note that the “Back” button of the internet browser does not work when using Genie.



2 How do I apply to use Genie?

If you are not a Genie user at this time, please contact the Yukon Education Advanced Education Branch at 867-667-5131 or toll free 1-800-661-0408, local 5131, to obtain more information. You will be asked to complete the Genie Organization Registration Form and to return the form and any supporting documentation to Labour Market Programs and Services. Once registered in Genie, the system will send you an email entitled “Genie Self Service Registration” with instructions, including your login information, i.e., your organization ID, user ID and temporary password.

3 How do I log into Genie?

To access your Genie User Home Page, log into the Genie application located at the following address:
<https://genie.gov.yk.ca>

TIP: Add <https://genie.gov.yk.ca> to your trusted sites in the Internet Option Tools

Enter the information provided in the email as follows.

The screenshot shows a login form with the following fields:

- Organization / Organisme: 123456
- User ID / Identifiant d'utilisateur: smithj
- Password / Mot de passe: (redacted)

Below the fields is a terms of use agreement section:

This is a private network for authorized use only and is the property of the Yukon Government. Unauthorized or improper use of this network is prohibited. Users understand and accept that any and all use
Le présent réseau est privé, il est réservé aux usagers autorisés et il appartient au gouvernement du Yukon. L'utilisation inappropriate ou sans autorisation du réseau est interdite. Les usagers

Agree to terms of use
Accepter les modalités d'utilisation

At the bottom right are two buttons: **Login** and **Connexion**.

Do not forget to read the Terms of Use and click the box to confirm that you agree with them.

TIP: It is recommended that you copy your temporary password from the email sent by Genie. However, note that any empty spaces copied will invalidate your attempt to login. In the second example pictured below, login will fail:

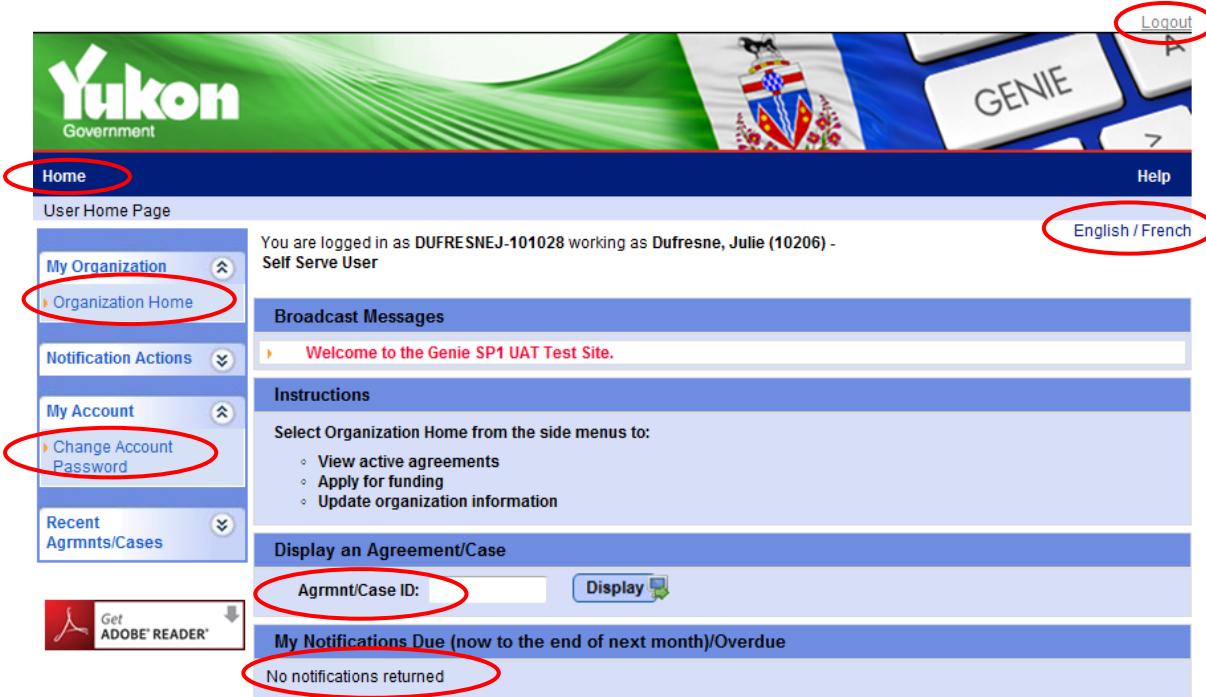
Password: ZkXunBmev8sK Password: ZkXunBmev8sK

What if I forgot my password?

If you do not remember your password or you need to reset it, click on the “Forgot your Password?” link on the Genie login page at <https://genie.gov.yk.ca>. You will need your Organization ID and User ID in order for Genie to verify your identity. A new password will be sent to your email address.

4 Getting to know my User Home Page

This is your starting place, and it is also where you can logout or change the language from English to French.



The self-serve **User Home Page** has four main sections:

Broadcast Messages: displays important messages to all Genie users

Instructions: describes some functions of Genie

Display an Agreement/Case: allows quick access to a specific agreement based on the entered ID

My Notifications Due/Overdue: displays all current and overdue notification items. "Current notifications" refers to the day of login until the end of the next month.

From the left side navigation menu, you can access **Organization Home**. Organization Home is where you can retrieve and change information regarding your organization, get information about your active and past agreements and apply for funding to one of the Labour Market Programs that Yukon Education manages through Genie.

From the left side navigation menu, you can also access **My Account**, where you are able to change your password.

5 How do I change my password?

The screenshot shows a 'Change Account Password' form. On the left, a vertical navigation menu is visible with 'Change Account Password' circled in red. The main area is titled 'Account Information' and contains three input fields: 'Current Password', 'New Password', and 'Confirm New Password'. At the bottom right of the form, there are two buttons: 'Save' with a green checkmark and 'Cancel' with a red X. The 'Save' button is also circled in red.

It is highly recommended that you change your password the first time you log into Genie. Choose something that is easy for you to remember. Use the left side navigation menu, **My Account**, and click **Change Account Password**. You will be asked to type in your current password and then your new password twice, to ensure there are no typographical errors.

Click the “Save” button and wait for the message to confirm that your password has been saved. Note that passwords will expire every 6 months. The system will not send notifications of password expirations. If your password expires, please click the “Forget your Password” button to have a new password generated for you.

6 Getting to know my Organization Home page



Using the left side navigation menu, click on **Organization Home** under My Organization. The left side navigation menu will change accordingly and you will now notice a new extended menu. The self-serve **Organization Home** page provides an up-to-date overview of your organization's agreements. This page is one of the entry points for accessing information about those agreements. The self-serve **Organization Home** page has three sections:

Organization Header: Displays the organization name and other key information related to your organization. This header is display-only and appears on a variety of screens.

Active Agreements: shows a list of your organization's agreements. Only active agreements are listed when you initially log into the page. Click on “Show History” in the bottom right of this section to see previous agreements. If you click on the agreement ID number hyperlink (indicated in blue), the **Agreement Homepage** will appear. The **Agreement Homepage** will provide you with information on specific agreements that your organization has with Advanced Education.

[Organization] Notifications: Genie presents a list of all notifications sent to your organization. Every self-serve user in your organization can view these notifications. Notifications are indicated as information or “action required.” To scroll through the notifications, click the next/previous page icons: To jump to the first/last page of the list, click the first/last page icons:

The Genie system will send you a notification when the financial and activity reports are due to be sent to the Government of Yukon. Notifications are listed in order of priority (under the column ‘P’):

- = Red is high priority
- = Yellow is medium priority
- = Green is low priority

Within a priority, the notifications are listed by date – oldest first.

A checkbox will appear against those notifications that may be deleted by you. If no checkbox appears, the Genie system will delete after a system process is completed.

In the following example, if you click on the “**Action Required**” type field, the hyperlink directs you to the screen that is used to complete the action. Once you execute a notification, the notification is automatically deleted.

To access a specific agreement, click on the hyperlinked **Agmnt ID** number hyperlink (indicated in blue). The **Agreement Homepage** appears.

The screenshot shows the LAMPSS system interface. On the left, a navigation menu includes links for Organization Home (circled in red), Organization Details, Organization Contracts, Org. Published Services, Apply for Funding, Programs and Services, My Account, Change Account Password, and Recent Agreements/Cases. A 'Get ADOBE READER' button is also present. The main content area displays organization details for 'LaMPSS Organization #: 101029' with the name 'MY ORGANIZATION'. It shows the organization is Public, located at ADDRESS LINE 2, ADDRESS LINE 3, WHITEHORSE, YT Y1A 0A0, CANADA, with a Vendor ID of CDMYORG. Below this is a table titled 'Active Agreements' showing two entries: one for Agreement ID 100967 (Start Date Sep 01, 2012, End Date Mar 31, 2014, Status Active, Program EAS(EDU-LMPS), Manager Dufresne, Julie) and another for 101832 (Start Date Jun 15, 2013, End Date Sep 15, 2013, Status Approved, Program SCP(EDU-LMPS), Manager Huggard, Eric). A 'Show History' link is available. The next section, 'MY ORGANIZATION Notifications', lists three items: 1) Action Required (100967) for EAS (EDU-LMPS) due Dec 15, 2012, regarding a Financial Report covering Sep 01, 2012 to Nov 30, 2012. 2) Action Required (100967) for EAS (EDU-LMPS) due Dec 15, 2012, regarding an Activity Report covering Sep 01, 2012 to Nov 30, 2012. 3) Info (101832) for SCP (EDU-LMPS) due Jun 13, 2013, regarding an Application verified and now being assessed. A 'Select All' checkbox and a 'Delete' button are at the bottom of the notifications table.

7 How do I update My Organization Information/Details?

From the **User Home Page** on the left side navigation menu, click the **Organization Home** and then on the **Organization Details** link. Details about your organization will be displayed.

The **Genie (LAMPSS) Organization** number is a unique identifier assigned by the system when an organization is added to the Genie organization registry. The **Organization Name** is retrieved from the Yukon Government financial system. The **Vendor ID** is attributed by the Yukon Government.

LaMPSS Organization #: 101028

Name: My Organization

Type:	Address: CALGARY, AB T2M 0L4, CANADA	Vendor ID: CDMYORG	Active Vendor: Yes
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Organization Details:

Corporate Affairs Registry #:	GST Rebate %:				
Legal Name:	My Organization				
Org. Type:	- select -				
Established Date:	31/12/2000				
Website:					
Preferred Comm. Method:	Email	# of Employees:			
Accounting Details:	Practices: - select -	Fiscal Year End:	DD/MM		
	System: - select -	Software:			
Insurance Coverage:	<input type="checkbox"/> Accident	<input type="checkbox"/> Liability	<input type="checkbox"/> WCB	WCB Rate / \$100:	

Addresses

Address Type: Mailing	<input checked="" type="checkbox"/> Default Address	
Care Of:		
Line 2:		
City: CALGARY	Country: CANADA	
Postal Code: T2M 0L4	Province/Territory: Alberta	
Address Type: Civic		
Care Of:		
Line 2:		
City:	Country: - select -	
Postal Code:	Province/Territory: - select -	
Phone Type: Primary	Number: <input type="text"/>	<input checked="" type="checkbox"/> Default Phone
Phone Type: Fax	Number: <input type="text"/>	

Save  Cancel 

Make sure that the information fields on your business/organization are current and accurate. You can modify the information yourself and save the page before moving to the next one.



8 How do I update my Organization Contacts/users?

From the **User Home Page** on the left side navigation menu, click the **Organization Home** and then on the **Organization Contacts** link. Information about Genie users within your organization will be presented.

The **Organization Contacts** page has two main sections:

Organization header: displays the organization name and other key information related to the organization. This header is display-only and appears on numerous screens.

Contacts: displays contact information for your organization's registered Genie users, including the email address and phone numbers if available.

User profiles

All organizations using Genie require a Self-Serve Full Update User. This person is the primary contact and is the only person who can add, activate and de-activate Genie users for their organization. Only one primary contact is permitted.

Before you add a new self-serve user, you need to consider what kind of access that user will require in order to do their job. Genie offers the choice of three self-serve user levels of access.

Genie Security Role	User Profile	Level of Access
ORGSSUSRPC	Self-Serve Full Update (primary user)	Is identified as the primary contact Able to update your organization information Able to add/de-activate self-serve users Able to submit applications for funding Able to submit activity and financial reports
ORGSSUSR	Self-Serve Partial Update	Able to view your organization information Able to submit applications for funding Able to submit activity and financial reports
ORGSSUSRINQ	Self-Serve View	Able to view your organization information Able to view agreement information

Your **Self-Serve Full Update** user profile should be assigned to one individual with the knowledge and responsibility for managing who can do what in your organization. Ideally the person with this profile will also have good computer skills.

The **Self-Serve Partial Update** user profile should be assigned to those individuals who will be responsible for submitting electronic applications for funding and scheduled financial reports and activity reports. These would be the people who interact with the department during the agreement management lifecycle.

The **Self-Serve View Only** user profile can be used for any person in your organization who needs to be aware of what's going on with your agreements but is not responsible for any of the actions required for those agreements. These could include administrators who reconcile money or who need to be aware of certain information, but are not responsible for filing reports with Yukon Education.

How do I add & de-activate user contacts?

The screenshot shows the Yukon Government LaMPSS Organization Contacts page. The left sidebar includes links for My Organization, Apply for Funding, Programs and Services, My Account, and Recent Agreements/Cases. The main content area displays organization details (LaMPSS Organization #: 101028, Name: My Organization) and a contacts table. A new contact is being added: Last Name / Email: Dufresne, julie.dufresne@gov.yk.ca; First Name / Title: Julie, President; Phone / Mobile: (867) 123-4567; Primary: checked; Self-Serve User Id: DUFRESNEJ-101028. The 'Add Another' button is highlighted with a red circle.

To set up a new self-serve user ID, click the “Add Another” button. Note that only users with Self-Serve Full Update profile can add contacts and therefore, see the “Add Another” button.

The screenshot shows the same Yukon Government LaMPSS Organization Contacts page after adding a new contact. The contacts table now includes a third row: Last Name / Email: Smith, julie.dufresne@gov.yk.ca; First Name / Title: John, co-President; Phone / Mobile: (867) 123-4567; Primary: unchecked; Self-Serve User Id: Create User Id. The 'Create User Id' link is highlighted with a red circle. The 'Save' button at the bottom right is also highlighted with a red circle.

Enter the user information details and save the changes. Genie will close the **Organization Contacts** page and bring you back to the **Organization Home** page. Click again on **Organization Contacts** from the left side navigation menu. You will notice that a new “Create User ID” link is now created. Follow this

link, which will lead you to a new page called **Self-Serve User Details** in order to select the user profile. Once you clicked on “save,” Genie will create the user ID and will send an email with the login information to the user.

There is no limit to the number of User IDs you may create; however, only one user can be identified as the primary contact. If you identify a new user as the primary contact, the previous primary contact will be replaced. The user profile is still valid, but is no longer the primary contact.

The **Organization Contacts** screen is also where you can de-activate user IDs. If an individual leaves your organization, you should de-activate his/her user ID. Do not forget that individuals may access information in Genie; e.g., information about your organization and related agreements, as long as they are Genie users.

Last Name / Email	First Name / Title	Phone / Mobile	Primary	Self-Serve User Id
Dufresne julie.dufresne@gov.yk.ca	Julie President		<input checked="" type="checkbox"/>	DUFRESNEJ- 101028
Smith julie.dufresne@gov.yk.ca	John co-President	(867) 123-4567	<input type="checkbox"/>	Create User Id

Displaying records 1 - 2 of 2

Add Another De-Activate

Save Cancel

9 How do I apply for funding?

From the left side navigation menu, click on the **Organization Home** link. The left side navigation menu will change accordingly, and you will now notice a new section called **Apply for Funding**. Click on "Programs and Services."

The screenshot shows the Yukon Government Organization Home page. The left sidebar has a section titled 'Apply for Funding' with a sub-item 'Programs and Services' circled in red. The main content area displays organization details (LaMPSS Organization #: 101028, Name: My Organization) and active agreements (Type: CALGARY, AB T2M 0L4, CANADA, Vendor ID: CDMYORG). Below this is a table for 'Active Agreements' with one record listed. At the bottom, there's a section for 'SAIT 1301 16 AVE NW G109 Notifications' with one notification entry. A 'Get ADOBE READER' button is also visible.

Programs that Yukon Education manages via Genie will be displayed. Click on the name of one of the programs listed for more information, and a **Self Serve Program Popup** appears.

The screenshot shows the Yukon Government Organization Home page with the 'Programs and Services' link circled in red. The main content area displays organization details (LaMPSS Organization #: 101028, Name: My Organization) and a 'Programs' section. Under 'Programs', there is a list of items including 'Community Training Fund (CTF) - Communities', 'Community Training Fund (CTF) - Projects' (which is also circled in red), 'Employment Assistance Services', and 'Labour Market Agreement'. The 'Community Training Fund (CTF) - Projects' item is highlighted with a red circle.

*** Please note that the list of programs above is an example.

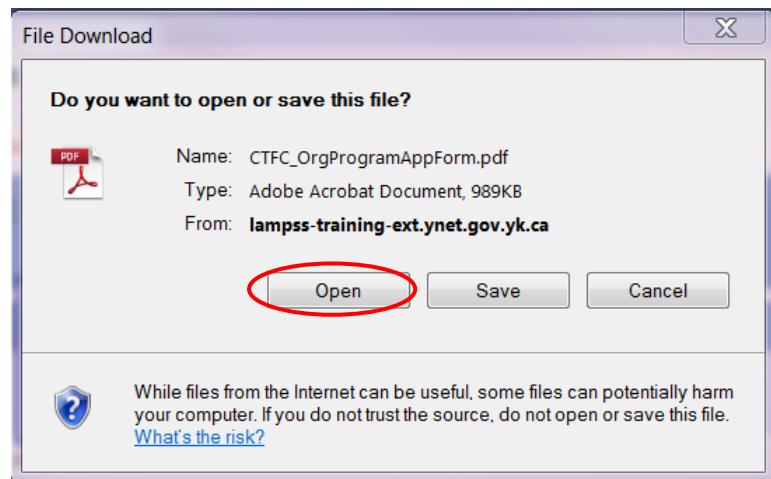
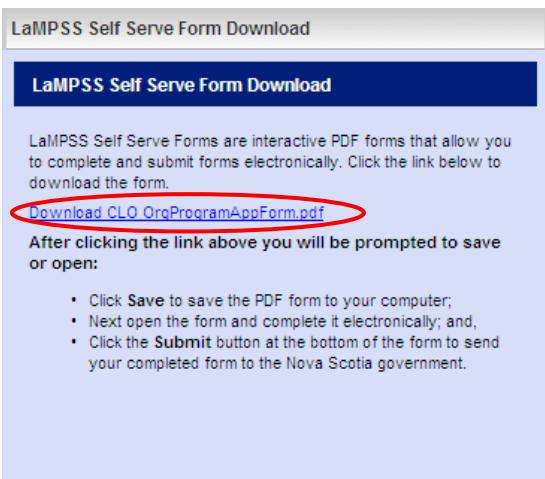
From the Self-Serve Program Popup you can:

- navigate to programs' public websites for more information or to access program guidelines
- click **Apply Now** to access the electronic application form



When you click on **Apply Now**, Genie will generate an electronic application form for this program. Genie will automatically fill in basic information such as the organization's name and contact information.

Another popup window will instruct you to click on a link to download the form. *Note: Depending on how your browser is configured, you may see a message at the top of your screen asking you to allow the download. If that happens, click as instructed and the form will download.* You must have Adobe version 9.3 or higher to use Genie self-serve forms.



When the download is completed you will be prompted to choose from the options "Open," "Save" or "Cancel." We recommend that you choose "Save," which will allow you to specify both a file name and a location on your PC to save your customized application form. One of the benefits of Genie e-forms is that you can work off-line and develop your application without being logged into Genie.

In the "Before You Begin" section, you will be directed to a website where you will be invited to download/print a copy of the program's guidelines.



Community Training Fund (CTF) - Projects Application

Before You Begin

Please visit the program's home page at http://www.education.gov.yk.ca/employers/community_training_funds.html and download the Program Guidelines document. Review the Guidelines document carefully and prepare or gather any supplemental documents required to submit along with the application.

Complete this form electronically. You may save it to your local computer or even transfer it between computers. You may continue to edit this form over multiple editing sessions until you are satisfied that the information is complete and all supplemental documents are attached. Once complete, follow the instructions at the end of this form to submit this application.

Organization Information

My Organization
1234 rue des organisations
CALGARY, Alberta
T2M0L4
CANADA

Project Details

Department/Area	Program
EDU-LMPS	Community Training Fund (CTF) - Projects

Project title *

Please enter the date range you are seeking funding for related to this project. Click in the date boxes below to access the calendar selection tool.

Agreement start date (DD/MM/YYYY) *

Agreement end date (DD/MM/YYYY) *

Past Agreements

Yes, this application is a renewal of a past agreement

Previous agreement number or project name *

As a best practice we suggest you gather all the information required to complete your agreement application *before* you start entering the details. The guidelines will help you determine what information you should be gathering.

When you have completed your application, enter your login information on the last page of the PDF form and click "Submit Application."

You do not need to log back into Genie to submit the application. When you enter your login information and click the "Submit Application" button, the form is automatically submitted to Genie.

When you submit an e-form, Genie will do some basic validation. The system will check that the form is not older than 120 days and will verify that all required fields are populated, including the attached mandatory supporting documents. Yukon

Warning: JavaScript Window - Submission Received



Your application was submitted successfully. Your agreement number is 100584.

Please note, while your application has been received, it has not yet been approved. Please refer to the LaMPSS self-service web site for information on the status of your application at: <https://lamps.gov.ns.ca/self-service>

Genie will automatically fill in the fields for your Organization Information and Program name. Your application form is customized to you and the program to which you are applying. The areas highlighted in red are fields in which you need to provide information that is specific to your project.

There are situations in which you are required to include additional materials with your application. The e-form allows you to attach documents to your application. A popup window will appear that allows you to locate from your directory the file that you need to attach. Simply find the document, select it and click on the "Open" button to return to the form. If you've attached the wrong file you may remove the file using the "Remove" button.

The screenshot shows the "Community Training Fund (CTF) - Projects Application" form. In the "Supporting Documentation" section, it says: "Please review your program guidelines for instructions related to attachments. The following documents are mandatory and must be submitted with this application." A list of mandatory documents includes: HR Policy, Itemized Budget Breakdown, Job Description, Labour Market Relevance, Letter of Support, Organization Overview, Other Sources of Funding, Service Standards, and Supplementary Information. Below this, there is a section for attaching documents, with a dropdown menu for "Select a document type" and a "Attach a Document" button. The "Attached Documentation" section shows a table with columns for "Document name" and "Type". The "Submit Application" section contains fields for "Organization ID" (101028), "Username" (dufresnej), and "Password" (*****). A "Submit Application" button is also present.

Education staff will verify that the application is complete and includes all the necessary documentation. If you have provided all the information required, you will also receive a message indicating that your submission has been received. Your **Agreement ID** will be in the first line of this message. It may take

OK

several minutes for an application to submit, especially if large files are attached.

As soon as Genie receives your application, you will see the new application on your **Organization Home** page. New applications will have a status of “application.” As your agreement application moves through Yukon Education’s business processes, you will receive notifications in situations in which you need to take action, such as requests for additional information or documentation.

If you click on the **Agreement ID**, you will be taken to the **Agreement Homepage**, where you can view information about your agreement.

10 Getting to know my Agreement home page

The **Agreement Homepage** can be accessed in three ways:

- From the **User Home Page** by entering an Agreement ID in the **Agmnt/Case ID** field of the **Display an Agreement/Case** section.
- From the **User Home Page** by clicking on a hyperlinked Agrmnt ID in either the **My Task Items Due/Overdue** or the **My Notifications Due/Overdue** items.

You are logged in as SUGDENL-101008 working as Sugden, Luke (10202) - Self Serve User

Welcome to the Genie SP1 UAT Test Site.

Select Organization Home from the side menus to:

- View active agreements
- Apply for funding
- Update organization information

Display an Agreement/Case

Agmnt/Case ID: Display

My Task Items Due (now to the end of the next month)/Overdue

No task items returned

My Notifications Due (now to the end of next month)/Overdue

P	Type	Agmnt/Case ID	Org/Player	Program	Created By	Due Date
!	Reminder	101857	My Organization	CTFS (EDU-LMPS)	JNDUFRES	Nov 18, 2013

Please update your Organization Details screen. Thank you

Displaying notifications 1 of 1

- From the **Organization Homepage** by clicking on a hyperlinked **Agrmnt ID** link.

The screenshot shows the Yukon Government LaMPSS Organization homepage. The top navigation bar includes links for Home, User Home Page, Organization Home, Logout, and Help. The main content area displays the LaMPSS Organization # (101028) and the organization's name (My Organization). It shows basic information like Type (Self Serve User), Address (CALGARY, AB T2M 0L4, CANADA), and Vendor ID (CDMYORG). Below this is a section titled "Active Agreements" with a table:

Agreement ID	Start Date	End Date	Status	Program	Agreement Manager
101851	Mar 02, 2014	Apr 30, 2015	Assessment	CTFP(EDU-LMPS)	Dufresne, Julie

Below the table, it says "Displaying records 1 of 1" and there is a "Show History" link. The next section is "My Organization Notifications" with a table:

P	Type	Agreement Case ID	Program	Assigned To	Created By	Due Date
	Info	101851	CTFP (EDU-LMPS)	My Organization NW G109, CALGARY	JNDUFRES	Oct 16, 2013

Below the table, it says "Application was verified and is now being assessed" and there is a "Select All" checkbox. At the bottom, it says "Displaying notifications 1 of 1" and there is a "Delete" button.

TIP: Click on the Show History link to see past agreements

The **Agreement Homepage** has three sections:

Agreement header: displays basic agreement information

Program Area Essentials: displays program related details for the selected agreement such as the agreement's status, start and end dates of the agreement, the name of the Yukon Education agreement manager, the program under which you have an agreement, due date for the upcoming reports as well as the requested/approved budget amounts and the project/agreement description.

Agreement Notification Items: displays notifications that are directly related to the agreement.

On the left side navigation menu, you can access the **Agreement Documents** and **Cheque History** for this Agreement.

You are logged in as DUFRESNEJ-101028 working as Dufresne, Julie (10206) - Self Serve User

Agrmnt ID: 101851

Program: CTFP(EDU-LMPS) **Status:** Assessment - Oct 16, 2013
Agreement Manager: Dufresne, Julie (10021) **Start Date:** Mar 02, 2014
Office: Whitehorse (EDU-LMPS) **End Date:** Apr 30, 2015

Program Area Essentials

Agmnt Name:	Genie Training Project	Next Activity Report Due Date:
Next Financial Report Due Date:	Requested Amount:	\$0.00
Next Payment Issue Date:	Budget Amount:	\$ 50,000.00
Amount Disbursed To Date:	O/P Amount:	
Number of Amendments:	0	
Agmnt Duration:	60 week(s), 5 day(s)	
Agmnt Description		

Agreement Notification Items

P	Type	Assigned To	Created By	Due Date
●	Info	My Organization G109, CALGARY	JNDUFRES	Oct 16, 2013
Application was verified and is now being assessed				

Displaying notifications 1 of 1

LAMPSS-TRAINING-INT Privilege Set IDs: 100203 YukonAppBuild_20130314.2

How do I find out what payments were made under an agreement?

Through the **Cheque History** screen you can see the payments that have been processed under a selected agreement. You can also search for a specific payment based on certain key fields. Through this interface you can confirm if a payment you are expecting has been processed.

It should also be noted that the Department of Finance consolidates payments. If the nightly direct deposit processing or the weekly cheque run contains multiple payments for your organization, those payments will be consolidated into a single direct deposit/cheque for the sum of the payments. The cheque history visible on Genie is specific to Genie payments only.

How do I access the agreement documents?



The screenshot shows the Yukon Government Genie system interface. At the top, there's a green banner with the Yukon Government logo and a keyboard graphic. Below it, the main navigation bar includes 'Home', 'User Home Page', 'Agreement Homepage', 'Maintain Agreement Documents', and 'Help'. A message at the top right says 'You are logged in as DUFRESNEJ-101028 working as Dufresne, Julie (10206) - Self Serve User' with a 'Cancel' button.

The left sidebar has a 'Financial Actions' section with 'Cheque History', 'Agreement Tools' (which is circled in red), and 'Agmnt Documents'. Below that is a 'Recent Agmnts/Cases' section. The main content area displays 'Agmnt ID: 101851' and details about the program, manager, office, status, start date, and end date. It also includes a 'Document Search' section with fields for Topic, Name, Date Range (Created Date), and search buttons. The 'Search Results' table lists one document entry:

Module	Type	Document Name	Topic	View	Created / Changed
Agrmnt Production	Application Verification	CTFP_OrgProgramAppForm	Agreement Contract	PDF	Jul 09, 2013 Jul 09, 2013

At the bottom, there are 'Delete' and 'Replace' buttons, and a 'Save' button with a checkmark and a 'Cancel' button.

Through the **Agreement Tools**, you can access any documents attached to your agreement. One of the documents you will find on this page is a PDF of your submitted application. Also, all the **Financial and Activity Reports** submitted to Advanced Education can be found here. Note that any document added to Genie is automatically converted to a PDF (Adobe) format.

11 How do I submit financial and activity reports?

Starting from your organization home page you can download your customized Financial and Activity Reports. Click on the “Action Required” link and follow the instructions.

You are logged in as DUFRESNEJ-101029 working as Dufresne, Julie (10100) - Self Serve User

LaMPSS Organization #: 101029
Name: MY ORGANIZATION

Type: Public
Address: ADDRESS LINE 2
ADDRESS LINE 3
WHITEHORSE, YT
Y1A 0A0, CANADA
Vendor ID: CDMYORG

Active Agreements

Agreement ID	Start Date	End Date	Status	Program	Agreement Manager
100987	Sep 01, 2012	Mar 31, 2014	Active	EAS(EDU-LMPS)	Dufresne, Julie
101832	Jun 15, 2013	Sep 15, 2013	Approved	SCP(EDU-LMPS)	Huggard, Eric

Displaying records 1 - 2 of 2

[Show History](#)

YTG LMDA - DO NOT PAY ADDRESS LINE 1 Notifications

P	Type	Agrmnt/Case ID	Program	Assigned To	Created By	Due Date
<input checked="" type="checkbox"/>	Action Required	100987	EAS (EDU-LMPS)	My Organization ADDRESS LINE 1, WHITEHORSE	AJSOLOMO	Dec 15, 2012
<input checked="" type="checkbox"/>	Action Required	100987	EAS (EDU-LMPS)	My Organization ADDRESS LINE 1, WHITEHORSE	AJSOLOMO	Dec 15, 2012
<input type="checkbox"/>	<input checked="" type="checkbox"/> Info	101832	SCP (EDU-LMPS)	My Organization ADDRESS LINE 1, WHITEHORSE	EJHUGGAR	Jun 13, 2013

Financial Report covering Sep 01, 2012 to Nov 30, 2012 is due.

Activity Report covering Sep 01, 2012 to Nov 30, 2012 is due.

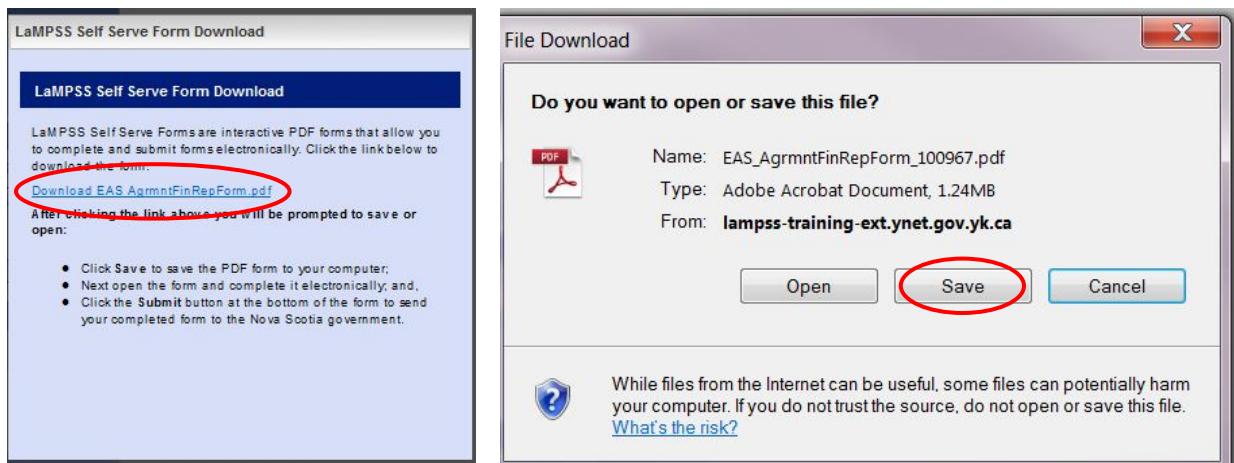
Application was verified and is now being assessed

Select All
Displaying notifications 1 - 3 of 3

[Delete](#)

LAMPSS-TRAINING-INT Privilege Set IDs: 100210,100311,100317,100322,100325 YukonAppBuild_20130314.2

Click on the “Action Required” hyperlink. Genie will invite you to download a PDF form. Similar to the agreement application, Genie will generate a customized financial or activity report for your project/agreement. Both the activity and financial reports are also customized to your organization. Basic information such as organization name and address are automatically included in all Genie reports.



It is recommended that you save this form on your computer. Completion of this application may require input from multiple people, and having a copy on your local computer allows you to work on completing the information without being connected to Genie.

When you're done, you simply enter your login information [the same login information you use to access Genie] and use the "Submit Report" button to send the completed report to Yukon Education. Similar to the application process, Genie will do some basic validations to ensure the expected fields contain the necessary data.

The screenshot shows a 'Submit Report' page. It has three text input fields: 'Organization ID *', 'Username *', and 'Password *'. Each of these fields is highlighted with a red rectangular border. To the right of the fields is a large grey 'Submit Report' button.

12 Who do I contact for help?

For more information on Genie, please contact an Officer at Yukon Education/Advanced Education Branch at 867-667-5131 or toll-free 1-800-661-0408, local 5131.