GUIDE 7 — RMK STAFF: WHAT YOU APPROVE AND HOW

Who this is for. You work at RMK and you decide things other people are waiting for.

Every procedure here changes something a customer can see. Each one says what to check BEFORE you approve, what the customer then sees, and whether you can undo it. Where you cannot undo it, that is said in capitals, because it is the thing worth knowing before you click.

WHO IS WAITING, AND FOR HOW LONG

Start here. Everything else in this guide is reached from it.

1 **Open Today's queue.**

What you will see: Every queue with a count beside it, and the oldest thing waiting in each.

If it goes wrong: A queue with a count of zero is shown anyway, so you can tell 'nothing waiting' from 'the queue is broken'.

Step 1 of 1

VERIFY READINESS EVIDENCE

A check a business backed with a document can be marked RMK-verified. Its confidence level then goes up.

1 **Open Verify readiness evidence and find the business.**

What you will see: The newest uploaded documents, each with its business.

Step 1 of 2

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2 **Open the document, then mark the check RMK-verified or Not accepted, with a note if needed.**

What you will see: Your name and the time are logged. You can change it later: the newest choice counts.

If it goes wrong: Leave names, ID numbers, phone numbers and bank details out of the note.

Step 2 of 2

REVIEW CALIBRATION

How well the readiness 2.0 funding score predicted the funding outcomes businesses recorded.

1 **Open Review calibration and read the counts.**

What you will see: Approved and declined, average scores, approval rate by band, and each area's gap.

If it goes wrong: With fewer than five approved and five declined outcomes there is no suggestion.

Step 1 of 3

2 **Approve or reject a proposed weight set, with a note.**

What you will see: Approving gives a new version in use; both are logged.

If it goes wrong: A suggestion is NEVER used until you approve it.

Step 2 of 3

3 **Switch which score the gates read only after reading the switch report.**

What you will see: RMK Retail, funders' minimum scores and Honey-Guide read the version you chose. The switch is logged.

If it goes wrong: Switch back the same way.

Step 3 of 3

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APPROVING AN ACCOUNT

1. **Open the account approvals queue.**

   What you will see: Who is waiting, what they asked for, and when.

   Step 1 of 3

2. **Before approving: check the business exists at CIPC and the email is the person's own.**

   Step 2 of 3

3. **Approve. Your name is recorded against it.**

   What you will see: The customer's tools open. They are not told automatically -- send them a line.

   Step 3 of 3

WHAT THIS DOES NOT DO YET

APPROVING AN ACCOUNT CANNOT BE UNDONE ON THIS SCREEN.

Nobody is told automatically when you approve. If you do not write to them, they find out by trying again.

APPROVING A FUNDER

A funder registers their institution and their mandate, and cannot see a single business until you approve them.

1. **Before approving: check the institution is registered and that the person asking works there. Phone the switchboard, not the number on the form.**

   Step 1 of 4

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2 **Signed in as the RMK account, open the list of claims, pick the person, and confirm them -- writing down how you checked they work there.**

What you will see: They become a funder on the platform and can see businesses that have agreed to be seen. Your name and how you checked are recorded.

If it goes wrong: If it says 'This list is for RMK', you are signed in as yourself: claims are decided from the RMK account. It will not let you confirm without writing how you checked -- that line is the only record of why they were let in.

Step 2 of 4

3 **If you cannot confirm them, refuse the claim and say why.**

What you will see: The claim is closed and the stand-in (the first superuser) keeps looking after that fund's details.

Step 3 of 4

4 **Their listing has its own approval box. Tick it to mark the listing checked; untick it to take that back.**

What you will see: The listing shows as approved, with your name. This box does NOT open the funder screens -- confirming the claim does.

Step 4 of 4

WHAT THIS DOES NOT DO YET

CONFIRMING A FUNDER CANNOT BE UNDONE ON ANY SCREEN, and the funder is not told when you confirm them. If a funder must lose access, a developer removes it by hand -- ask before you confirm, not after.

APPROVING A CONSULTANT OR PROFESSIONAL

1 **Open the consultant applications.**

What you will see: Who has applied, what they do, their registration and their references.

Step 1 of 5

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2 **Before approving: check the professional registration number with the body they name, and phone one reference.**

Step 2 of 5

3 **Approve, decline or ask for more -- and write down why. Your name and the date are recorded with it.**

What you will see: Approved: businesses can find them. The applicant's own page tells them what you decided and why.

If it goes wrong: It will not record a decision without a reason. That line is the only record of why somebody was let in, or kept out.

Step 3 of 5

4 **To take somebody off the panel, withdraw them there, with the reason.**

What you will see: They lose access to every business at once. Work they already did stays with the business.

Step 4 of 5

5 **When a business has paid and the work is signed off, pay the consultant by EFT and record the reference.**

What you will see: The payment leaves the owed list. Banking details are shown only as the bank and the last three digits.

Step 5 of 5

RUNNING A COURSE INTAKE

1 **Create the intake and put it in the diary.**

What you will see: It appears to learners as a date with seats.

Step 1 of 5

2 **Staff it: a facilitator, and an assessor.**

What you will see: Those people get the intake on their screens.

If it goes wrong: An intake with no facilitator cannot record attendance.

Step 2 of 5

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3 **Confirm paid seats as the money arrives.**

What you will see: The learner is on the course list.

If it goes wrong: Confirm against the bank, not against what the learner says.

Step 3 of 5

4 **Record attendance on the day.**

What you will see: The learner's record shows it.

Step 4 of 5

5 **Issue certificates at the end.**

What you will see: Each learner who is ready is listed; those who are not say why.

Step 5 of 5

ALLOCATING A MENTOR

1 **Open the allocation queue.**

What you will see: Who is waiting and for how long.

Step 1 of 2

2 **Build a shortlist for a mentee.**

What you will see: Candidates, with a reason beside each.

Step 2 of 2

WHAT THIS DOES NOT DO YET

THERE IS NOT ONE HUMAN MENTOR ON THE PANEL. Every mentorship is RMK standing in. The shortlist builder works and has nobody to shortlist.

RESETTING A LOCKED QUIZ

1 **Open the quiz resets queue.**

What you will see: Who is locked out and after how many attempts.

Step 1 of 2

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2 **Before resetting: ask whether they have read the topics. A reset without reading is a fourth failure.**

Step 2 of 2

THE CHART OF ACCOUNTS

1 **Look at the accounts a business has chosen.**

What you will see: The chart, with their ticks.

Step 1 of 2

2 **When a business adds an account of its own, it lands under a group. Check it is in the right place.**

If it goes wrong: An account in the wrong group makes the balance sheet wrong in a way the business cannot see.

Step 2 of 2

CONSENT WITHDRAWALS

1 **A business withdraws its own consent; you do not do it for them.**

What you will see: They disappear from every funder list from that moment.

If it goes wrong: If a business asks you to withdraw for them, walk them to the screen instead. It is their decision and it should be their click.

Step 1 of 1

THE APPROACHES LIST

1 **See funder approaches and their answers.**

What you will see: Who approached whom, and what came back.

Step 1 of 1

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WHAT YOU CAN CHANGE YOURSELF, AND WHAT YOU MUST NOT

Some things you change on a screen, with your name recorded. Some need a developer. And a few rows in the site administration must never be deleted by hand, because deleting one deletes customers' records with it.

1. **Decide consultant applications: approve, decline, ask for more, or take somebody off the panel.**

   What you will see: Your name, the date and your reason are recorded.

   Step 1 of 9

2. **Keep each industry's list of licences and permits: add one, make a business's suggestion standard, stop one counting, or merge two.**

   What you will see: Every business in that industry sees the change on its checklist.

   Step 2 of 9

3. **Confirm or refuse a funder's claim on their fund.**

   Step 3 of 9

4. **Keep the spending figures a business plan reads, on the spending screens under Stats.**

   Step 4 of 9

5. **Record that a consultant has invoiced, and that RMK has paid them.**

   Step 5 of 9

6. **Ask a developer to change: the words in these guides, the readiness questions and how much each counts, the prices, the chart of accounts, the wording of emails, and the consent and terms wording.**

   What you will see: These are written in the platform's code. A change goes out with the next release.

   If it goes wrong: Consent and terms wording is a legal decision before it is an edit -- agree it first.

   Step 6 of 9

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7 **Change lesson text and quiz questions only in the site administration, and only the words.**

What you will see: There is no screen for lessons or quiz questions yet.

Step 7 of 9

8 **NEVER DELETE, in the site administration, an industry, a sector, a province, a country, a qualification or a training programme.**

What you will see: Deleting one row deletes every business record that points at it -- more than 170 kinds of record for an industry, more than 250 for a qualification. If one is wrong, rename it and ask a developer.

If it goes wrong: If one has been deleted, stop and tell a developer at once: the records can only come back from a backup.

Step 8 of 9

9 **Never edit a readiness score by hand. It is worked out from the answers; change an answer and the score follows.**

Step 9 of 9

WHAT THIS DOES NOT DO YET

NOTHING ON THE PLATFORM STOPS A DELETE IN THE SITE ADMINISTRATION FROM TAKING CUSTOMERS' RECORDS WITH IT. Deleting one industry removes records of more than 170 kinds. Until that is changed, the only protection is not to do it.

STUCK?

A person at RMK can help with any step on this page. There is a WhatsApp button on every screen and it carries with it which screen you were on, so you do not have to explain where you got to.

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