My AmeriCorps
AmeriCorps State Program
Member Management

Presentation developed for the Corporation for National and Community Service by the eGrants Coaching Unit
JBS International, Aguirre Division (2008); 1-888-333-8272
The following presentation will guide AmeriCorps State Program users through how to manage members in My AmeriCorps.
All of the My AmeriCorps tutorials and webinars focus on the functionality of the system rather than grant requirements or program policies.

The My AmeriCorps system does not include comprehensive compliance checks.

We recommend that programs set their own policies around system use and monitor usage for compliance. However, we suggest that programs give some thought to how they assign roles and access so that they are comfortable with the level of authority they are giving their users.

If they have questions they should contact their program officer/program specialist or program director/project sponsor.
AGENDA

• How to search for members
• How to edit member info
• How to create, approve or reject a Change of Term of Service request
• How to create, approve or reject a Suspension request
• How to create, approve or reject a Reinstatement request
• How to create, approve or reject a Transfer-out request
• How to create, approve or reject a Transfer-in request
• How to exit a member as scheduled
• How to exit a member early
Member Management Workflow
AmeriCorps State Program

- Change Term of Service Request
- Member Suspension Request
- Member Reinstatement Request
- Member Transfer-Out-Request
- Member Transfer-In-Request
- Enrollment Form
- Exit Form

- eGrants users with Grantee Admin Role and Portal users with Member Management Role at any access level will be able to create and submit these forms

A Change Term of Service request can only be approved by authorized program staff within 90 days of the member’s start date. After this time, only a Grantee Administrator user can approve the request.

Authorized Program User
(eGrants users with Grantee Admin Role and Portal users with Member Management Role at the Prime and Operating site (sub-grantee) level will have access to approve/reject these form)

Approves or Rejects

Service Location
Creates

- Member Transfer-Out-Request
- Member Transfer-In-Request
- Enrollment Form
- Exit Form
Click on **Manage Members** to open the member search menu.
The fastest way to search for a specific member is by entering the Member ID number.
Member Search

Click on the arrow next to a column heading to arrange the list in an ascending order under that column heading.

Click on the **Member’s Name** to open up his/her home page.

If the member you are searching for is not listed, click **Search Again** to modify your search criteria.
Click on **Edit** Member Info to open the information page in edit mode.

Click on **View** to view details for the member's particular assignment/term.
The only two fields you cannot edit are NSPID and SSN.

Click on **Click here** if the permanent address is the same as the mailing address.
Edit Member Contact Info

Demographic Information:

Gender: Male
Citizenship Status: U.S. Citizen
Voting Registration: Yes
Highest Level of Education:

Which of the following categories best describes your racial or ethnic origins?:
- [ ] American Indian or Alaska Native
- [ ] Native Hawaiian or Other Pacific Islander
- [x] Black or African American
- [ ] White
- [ ] Asian
- [ ] Of Hispanic Origin
- [ ] Latino/Hispanic

Click on **Cancel** to return to the original version of member information
Click on **Save** to update the member information
In order to be able to change a member’s term of service, the program must first have unfilled MSYs available that equal the MSY associated with the new slot type.

Click on Change Term to create a Change of Term Request. If the member has been suspended or exited, this link will not be available.
Create Change Term of Service Request

Select the member’s new term of service

Select the appropriate Living Allowance option

Enter the effective date. If you click on the Calendar Icon, it will open up a calendar that you could use to select the date.
Create Change Term of Service Request

Click on **Cancel** if you don’t want to submit the Change Term of Service Request.

Click on **Create** to submit the Change Term of Service Request.
If there are no unfilled MSYs available that equal the MSY associated with the new slot type, a message will appear...
If there are slots available that equal the MSY associated with the new slot type, a message will appear indicating that the request has been created and is awaiting approval.
If your user role allows the option to approve the Change Term of Service, click **View** next to the appropriate service term to open the term’s service page info.

---

### Approve/Reject Change Term of Service Request

**eGrants Coaching Unit**

---

**Welcome Alyson**

- **Portal Home**
  - Trainer Profile
  - Search Potential Applicants
  - Search Submitted Applications
- **Manage Members**
  - Invite Members
  - Manage Events
  - Manage Programs
  - Manage Service Locations
  - Manage Users
  - Recruitment Workbasket
  - S&N Workbasket
  - S&N Reports
  - VISTA Workbasket
  - VISTA Reports

---

**Member Home**

Please note:
The change term request was created successfully and is pending approval.

---

**Member Information**

**Name:** Julie Woodland  
**Member ID:** 000000  
**SSN:** ****4000

**Date of Birth:** 03/02/1986  
**Username:** Julie2009  
**E-mail:** test@cns.gov

**Mailing Address:**  
Beautiful Clouds Ave.  
Chicago, IL 60000

**Permanent Address:**  
Smiling Trees Road  
Washington, DC 00000

**Home Phone Number:** 312-000-0000  
**Work or Other Phone Number:**

**edit member info**

---

**Service Information**

<table>
<thead>
<tr>
<th>Program</th>
<th>Organization</th>
<th>City/State</th>
<th>Service Start</th>
<th>Service End</th>
</tr>
</thead>
<tbody>
<tr>
<td>EAP - Education Awards Program</td>
<td>The College of New Jersey</td>
<td>Ewing, NJ</td>
<td>01/01/2006</td>
<td>12/31/2007</td>
</tr>
<tr>
<td>STATE - AmeriCorps*State</td>
<td>City Year, Inc.</td>
<td>Boston, MA</td>
<td>07/14/2008</td>
<td>06/19/2009</td>
</tr>
</tbody>
</table>
Approve/Reject Change Term of Service Request

Click Edit pending update to open the Change Term of Service Request

<table>
<thead>
<tr>
<th>State and National Service Term Information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong></td>
<td>Judie Woodland</td>
</tr>
<tr>
<td><strong>Program Name</strong></td>
<td>Serving Community</td>
</tr>
<tr>
<td><strong>Service Start Date</strong></td>
<td>07/14/2008</td>
</tr>
<tr>
<td><strong>Program Code</strong></td>
<td>06ACIHY0010014</td>
</tr>
<tr>
<td><strong>Trust Eligible</strong></td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Service Location</strong></td>
<td>Testing NY 2</td>
</tr>
<tr>
<td><strong>Service End Date</strong></td>
<td>06/19/2009</td>
</tr>
<tr>
<td><strong>Program Year</strong></td>
<td>2000</td>
</tr>
<tr>
<td><strong>Slot Type</strong></td>
<td>Full Time</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>State and National Service Term History</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Update Type</strong></td>
<td>Effective Date</td>
</tr>
<tr>
<td>n/a</td>
<td>07/14/2008</td>
</tr>
<tr>
<td>n/a</td>
<td>03/21/2009</td>
</tr>
<tr>
<td>n/a</td>
<td>03/22/2009</td>
</tr>
<tr>
<td><strong>Current Status</strong>: In-Service</td>
<td>(edit pending update) unlock exit form</td>
</tr>
</tbody>
</table>
A Change Term of Service request can only be approved by authorized program staff within 90 days of the member’s start date. After this time, only a Grantee Administrator user can approve the request.

Click S&N Workbaskets on the left navigational panel. Then click the Status Change Requests tab located on the top navigational panel.

Click on the Member’s name to open the Change Term of Service Request.
Approve/Reject Change Term of Service Request

<table>
<thead>
<tr>
<th>Change Term of Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>Click here for help.</td>
</tr>
<tr>
<td>Member Information</td>
</tr>
<tr>
<td>Name: Julie Woodland</td>
</tr>
<tr>
<td>Member ID: 000000</td>
</tr>
<tr>
<td>Trust Eligible: Yes</td>
</tr>
<tr>
<td>Assignment Information</td>
</tr>
<tr>
<td>Start Date: 09/02/2008</td>
</tr>
<tr>
<td>End Date: 06/18/2009</td>
</tr>
<tr>
<td>Program Name: Serving Community</td>
</tr>
<tr>
<td>Program Code: 06ACHNY0010014</td>
</tr>
<tr>
<td>Program Year: 2008</td>
</tr>
<tr>
<td>Service Location: Testing NY 2</td>
</tr>
<tr>
<td>Slot Type: Full Time</td>
</tr>
<tr>
<td>Living Allowance Option: With Living Allowance</td>
</tr>
<tr>
<td>Change Term of Service:</td>
</tr>
<tr>
<td>* Slot Type:</td>
</tr>
<tr>
<td>- Full Time (1700)</td>
</tr>
<tr>
<td>- One Year Half Time (900)</td>
</tr>
<tr>
<td>- Two Year Half Time (900)</td>
</tr>
<tr>
<td>- Reduced Half Time (675)</td>
</tr>
<tr>
<td>- Quarter Time (450)</td>
</tr>
<tr>
<td>- Minimum Time (300)</td>
</tr>
<tr>
<td>* Living Allowance Option: With Living Allowance</td>
</tr>
<tr>
<td>* Effective Date: 03/12/2009</td>
</tr>
</tbody>
</table>

Click **Cancel** if you want to make a decision later.
If you click **Reject** it will not impact the member’s current status or available slots.
When the request is approved, the slots type will be updated.
When the Change Term of Service Request is approved successfully, a confirmation message will appear on the member’s information page.
A member can be suspended at any time during the member’s term. The effective date of the suspension must be after the member’s start date and before the member’s required completion date. A member does not need to be suspended from the current term to serve in another (concurrent) term. A member serving concurrent terms cannot serve in simultaneous terms that exceed a full time term (1.0 MSY).

Click on **Suspend Member** to create a Member Suspension Request. If the member has been suspended or exited, this link will not be available.
Create Member Suspension Request

Enter the effective date. If you click on the Calendar Icon, it will open up a calendar that you could use to select the date.

Click on Cancel if you don’t want to submit the Member Suspension Request.

Click on Create to submit the Member Suspension Request.
Create Member Suspension Request

A confirmation message will appear indicating that the request has been created and is awaiting approval.
Approve/Reject Member Suspension Request

If your user role allows the option to approve the Member Suspension, click View next to the appropriate service term to open the term’s service page info.
## Approve/Reject Member Suspension Request

**View Service Term Information**

<table>
<thead>
<tr>
<th>Name</th>
<th>Judie Woodland</th>
<th>Program Name</th>
<th>Serving Community</th>
</tr>
</thead>
<tbody>
<tr>
<td>Member ID</td>
<td>000000</td>
<td>Service Location</td>
<td>Testing NY 2</td>
</tr>
<tr>
<td>Service Start Date</td>
<td>07/14/2008</td>
<td>Service End Date</td>
<td>06/19/2009</td>
</tr>
<tr>
<td>Program Code</td>
<td>06ACHNY0010014</td>
<td>Program Year</td>
<td>2000</td>
</tr>
<tr>
<td>Trust Eligible</td>
<td>Yes</td>
<td>Slot Type</td>
<td>Full Time</td>
</tr>
</tbody>
</table>

### State and National Service Term History

<table>
<thead>
<tr>
<th>Update Type</th>
<th>Effective Date</th>
<th>Updated By</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>n/a</td>
<td>07/14/2008</td>
<td>AWILLIAM</td>
<td>Active</td>
</tr>
<tr>
<td>n/a</td>
<td>03/21/2009</td>
<td>BILLCY2009</td>
<td>Suspended</td>
</tr>
<tr>
<td>n/a</td>
<td>03/22/2009</td>
<td>BILLCY2009</td>
<td>Reactivated (after Suspension)</td>
</tr>
</tbody>
</table>

**Current Status:** In-Service

[edit pending update] [unlock exit form]
Approve/Reject Member Suspension Request

Click **S&N Workbaskets** on the left navigational panel. Then click the **Status Change Requests** tab located on the top navigational panel.

Click on the **Member’s name** to open the Member Suspension Request.
Approve/Reject Member Suspension Request

Enter the effective date

Click **Cancel** if you want to make a decision later

Click on **Reject** if you don’t want to approve the Member Suspension Request

Click on **Approve** to suspend the member from the term
Once the request is approved, the member must be reinstated before you can exit him/her from the term.

When the Member Suspension Request is approved successfully, a confirmation message will appear on the member’s information page.

Name: Julie Woodland  
Member ID: 000000  
SSN: ******0000  
Date of Birth: 04/07/1997  
Username: Julie2009  
E-mail: test@cns.gov

Mailing Address:  
Beautiful Clouds Ave  
Chicago, IL 60000  
Permanent Address:  
Smiling Trees Road  
Washington, DC 20000

Home Phone Number: 312-000-0000  
Work or Other Phone Number:  
Home Phone Number: 930-000-0000

Service Information

<table>
<thead>
<tr>
<th>Program</th>
<th>Organization</th>
<th>City/State</th>
<th>Service Start</th>
<th>Service End</th>
</tr>
</thead>
<tbody>
<tr>
<td>STATE - AmeriCorps*State</td>
<td>City Year, Inc.</td>
<td>Boston, MA</td>
<td>09/02/2000</td>
<td>06/10/2009</td>
</tr>
</tbody>
</table>
A member can be reinstated at any time after the member has been suspended.

Click on Reinstate Member to create a Member Reinstatement request. If the member has not been suspended or exited, this link will not be available.
The effective date of the reinstatement must be after the suspension date and before the member's required completion date.

Enter the effective date

Click on **Cancel** if you don’t want to submit the Member Reinstatement Request

Click on **Create** to submit the Member Reinstatement Request

* Effective Date: 

Suspended on: 04/15/2009

Days of Suspension: 7
eGrants Coaching Unit

Approve/Reject Member Reinstatement Request

A confirmation message will appear indicating that the request has been created and is awaiting approval.

If your user role allows the option to approve the Member Reinstatement, click View next to the appropriate service term to open the term’s service page info.
Approve/Reject Member Reinstatement Request

View Service Term Information

State and National Service Term Information

<table>
<thead>
<tr>
<th>Name</th>
<th>Julie Woodland</th>
<th>Member ID</th>
<th>000000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Name</td>
<td>Serving Community</td>
<td>Service Location</td>
<td>Testng NY 2</td>
</tr>
<tr>
<td>Service start Date</td>
<td>09/02/2008</td>
<td>Service End Date</td>
<td>06/18/2009</td>
</tr>
<tr>
<td>Program Code</td>
<td>06ACHNY0010014</td>
<td>Program Year</td>
<td>2008</td>
</tr>
<tr>
<td>Trust Eligible</td>
<td>Yes</td>
<td>Slot Type</td>
<td>One Year Half Time</td>
</tr>
</tbody>
</table>

State and National Service Term History

<table>
<thead>
<tr>
<th>Update Type</th>
<th>Effective Date</th>
<th>Updated By</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>n/a</td>
<td>09/02/2008</td>
<td>AWILLIAM</td>
<td>Active</td>
</tr>
<tr>
<td>Changed term of service from FT to HT</td>
<td>03/12/2009</td>
<td>AAUGUSTIN</td>
<td>Active</td>
</tr>
<tr>
<td>n/a</td>
<td>04/15/2009</td>
<td>AAUGUSTIN</td>
<td>Suspended</td>
</tr>
</tbody>
</table>

Current Status: Suspended  (edit pending update)

Click Edit pending update to open the Member Reinstatement Request
Click **S&N Workbasket** on the left navigational panel. Then click the **Status Change Requests** tab located on the top navigational panel.

Click on the **Member’s name** to open the Member Reinstatement Request.
Approve/Reject Member Reinstatement Request

Enter the effective date

Click **Cancel** if you want to make a decision later

Click on **Reject** if you don't want to reinstate the member

Click on **Approve** to reinstate the member

Enter Reinstatement Information:

- **Effective Date:** 04/22/2009
- **Suspended on:** 04/15/2009
- **Days of Suspension:** 7
When a member is reinstated, the total days of suspension will be added to the member's required completion date.

A confirmation message will appear indicating that the member has been reinstated.

Click on Transfer Member to create a Member Transfer-Out Request.
Create Member Transfer-Out Request

The accepting program must have the member’s slot type available to transfer-in the member.

- Enter the Program Code (grant number) of the accepting program where you are transferring the member.
- Enter the Hours served by the member at your program and Effective Date.
- Click on Cancel if you don’t want to submit the Transfer-Out Request.
- Click on Create to submit the Transfer-Out Request.

Member Information:
- Julie Woodland
  - Member ID: 00000

Transfer Member Information:
- Name: Julie Woodland
- Trust Eligible: Yes

Assignment Information:
- Start Date: 09/02/2008
- End Date: 06/25/2009
- Program Name: Serving Community
- Program Code: 06ACHNY0010014
- Program Year: 2008
- Service Location: Testing NY 2
- Slot Type: One Year Half Time
- Living Allowance Option: With Living Allowance

Enter Transfer Information:
- * Transfer to Program Code:
- * Hours served:
- * Effective Date:
Create Member Transfer-Out Request

A confirmation message will appear indicating that the request has been created successfully.

If your user role allows the option to approve the Transfer-Out Request, click View next to the appropriate service term to open the term’s service page info.
Approve/Reject Member Transfer-Out Request

View Service Term Information

State and National Service Term Information

- **Name**: Julie Woodland
- **Member ID**: 000000
- **Program Name**: Serving Community
- **Service Location**: Testing NY 2
- **Service Start Date**: 09/02/2008
- **Service End Date**: 06/25/2009
- **Program Code**: 06ACHNY0010014
- **Program Year**: 2008
- **Slot Type**: One Year Half Time

State and National Service Term History

<table>
<thead>
<tr>
<th>Update Type</th>
<th>Effective Date</th>
<th>Updated By</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Changed term of service from FT to HT</td>
<td>03/12/2009</td>
<td>AAUGUSTIN</td>
<td>Active</td>
</tr>
<tr>
<td>n/a</td>
<td>09/02/2008</td>
<td>AWILLIAM</td>
<td>Active</td>
</tr>
<tr>
<td>n/a</td>
<td>04/15/2009</td>
<td>AAUGUSTIN</td>
<td>Suspended</td>
</tr>
<tr>
<td>n/a</td>
<td>04/22/2009</td>
<td>AAUGUSTIN</td>
<td>Reactivated (after Suspension)</td>
</tr>
</tbody>
</table>

Current Status: In-Service

Click **Edit pending update** to open the Transfer-Out Request
Approve/Reject Member Transfer-Out Request

Click S&N Workbaskets on the left navigational panel. Then click the Status Change Requests tab located on the top navigational panel.

Click on the Member’s name to open the Transfer-Out Request.
Approve/Reject Member Transfer-Out Request

Enter the effective date

Click **Cancel** if you want to make a decision later

Click on **Reject** if you don’t want to approve the Transfer-Out Request

Click on **Approve** to transfer the member

* Transfer to Program: Ready to Learn Providence
  * Hours served: 200
  * Effective Date: 04/23/2009
Approve/Reject Member Transfer-Out Request

A confirmation message will appear indicating that the request has been approved successfully and is awaiting approval from the new program.
Approve/Reject Member Transfer-In

Click S&N Workbasket on the left navigational panel. Then click the Pending Enrollments tab located on the top navigational panel.

Click on the Member’s name to open the Transfer-In Request.
Approve/Reject Member Transfer-In

- Enter the effective date
- Click **Cancel** if you want to make a decision later
- Click on **Reject** if you don’t want to approve the Transfer-In Request
- Click on **Approve** to Transfer-In (enroll) the member
When a member is transferred in to a new program, the slot the member was serving will be returned to the original program and can be used again. A confirmation message will appear indicating that the Transfer-In has been approved successfully which means that the member is now officially enrolled in the program.
Members who are approaching the end of their service (30 days prior to their expected completion date) will be listed in your Pending Exits workbasket. These members will have access to a link on their home page to complete their portion of the exit form which includes an option for them to complete their Member Satisfaction Survey.

Click on Pending Exits

Not Started means the member’s portion of the Exit has not yet been completed.

Submitted means the member has completed the section and is awaiting approval.

If you want to complete the member’s portion of the exit, click on his/her name.
Member Exit

If you are completing the member’s portion of the exit form, you should do so by using the exit form that was signed by the member.

Update the member’s mailing address as necessary.

Select whether or not the member wishes to allow the Corporation to release their contact information to service organizations.

Yes, I give the Corporation for National and Community Service permission to release my name, address (including e-mail), and telephone number to the following types of organizations:
Member Exit

please let us know.

☐ Yes, I give the Corporation for National and Community Service permission to release my name, address (including e-mail), and telephone number to the following types of organizations:

- Educational institutions that are interested in recruiting former AmeriCorps members or that provide special programs for former members
- Organizations offering professional development opportunities or staff positions to AmeriCorps members
- AmeriCorps Alumni organizations
- Organizations that sponsor service opportunities and want to recruit AmeriCorps members

If yes, I am particularly interested in the following issue areas (please mark all that apply):

☐ Education
☐ Public Safety
☐ Housing
☐ Environment
☐ Health
☐ Disaster Relief
☐ Homeland Security
☐ Faith and Community Based

☐ No, please do not share my information with other organizations

Certification of Service

Please check the boxes below to agree to the following statements:

☐ I certify that the time I reported as AmeriCorps service hours did not include any service activities prohibited by law, regulation, or grant provision.
☐ I certify that all of the information provided above is correct.
☐ I understand that a knowing and willful false statement on this form can be punished by one or more of the following: a fine or imprisonment (or both) under Section 1901 of Title 18, USC; exclusion from participation in Federal programs; forfeiture of benefits I may receive as a result of participation in this program; or other actions authorized by the Civil Fraud Remedies Act, 31 USC 3801-3812.

Click on Submit
A confirmation message will appear indicating that the member's portion of the Exit Form has been saved. Click on Exit Member to open the Exit Form and exit the member.
Member Exit

Enter the total number of hours the member served

Enter the date the member completed their service

Select the award status for the member’s term

FRA Program Name: Serving Community
Service Location:
Hours of Service: 500
Service Start Date: Sep 2, 2009
Expected End Date: Jun 18, 2009
Completion Date:
Type of Enrollment: Full Time

Eligible for entire education award
Did the member perform satisfactorily (complete all assignments, tasks, and projects)?
☐ Yes ☐ No

Certification of Service
☐ To the best of my knowledge and belief, the time the above-listed member reported as AmeriCorps service hours did not include any service activities prohibited by law, regulation, or grant provision.
☐ I certify that the Hours of Service Performed indicated on this form for this AmeriCorps member are true and accurate.
☐ I understand that a knowing and willful false statement on this form can be punished by a fine or imprisonment or both under Section 1001 of Title 18, U.S.C.
Member Exit

I certify that all of the information provided above is correct:

I understand that a knowing and willful false statement on this form can be punished by one or more of the following: a fine or imprisonment (or both) under Section 1001 of Title 18, U.S.C.; exclusion from participation in Federal programs; forfeiture of benefits I may receive as a result of participation in this program; or other actions authorized by the Civil Fraud Remedies Act, 31 USC 3801-3812.

Completed on 04/24/2009

Indicate whether or not the member performed satisfactorily

Check boxes under Certification of Service to certify the information you have entered on the exit form is correct

If you want to discard any changes you have made, click Cancel

Click on Approve to exit the member
A confirmation message will appear indicating that the member has been exited.

The Service End Date will be updated accordingly.
When exiting a member early, the member’s exit form will not be listed in your Pending Exits workbasket, nor will the member have access to it from their home page. Therefore, you have to manually place the exit form in the Pending Exits Workbasket for members who need to be exited early. This will also allow the member to complete their portion of the exit form.

Click **View** next to the appropriate service term to open the term’s service page info.
Once you unlock the exit form, you can wait for the member to complete member's portion of the Exit form or you can complete it on behalf of the member if the member has already completed and signed the paper exit form. Once the member's portion is completed, exit the member.
What’s next?

- **The Resource Center**
  - [www.nationalserviceresources.org/ac-training-support](http://www.nationalserviceresources.org/ac-training-support)
  - Includes other tutorials
  - Live training and registration schedule

- **The eGrants Coaching Unit**
  - 1-888-333-8272
  - egrantstta@jbsinternational.com
  - Training/Technical Assistance

- **The eGrants Help Desk**
  - 1-888-677-7849
  - Technical Assistance
  - User name/Password reset assistance