My AmeriCorps
AmeriCorps National Programs
Member Enrollment
Introduction

The following presentation will guide AmeriCorps National Program users through how to enroll and place a member in My AmeriCorps Portal.
Important Considerations

- 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.
We will cover the following agenda items:

- How to create a member invitation
- How to create and complete the member’s portion (Part 1 – Enrollment Information) of an enrollment form on behalf of a member
- How to complete the program’s portion (Part 2 – Placement Information) of the enrollment form
- How to delete an enrollment form
- How to activate a member enrollment
Member Enrollment Workflow

**Member Enrollment via My AmeriCorps Application Process**

**Applicant**
- Registers & submits application to a listed service opportunity

**Program/Service Location**
- Accepts application and extends invitation to serve

**Member**
- Start serving

**Program/Service Location**
- Completes & approves Enrollment Form (Part 1) and activates term

**Applicant**
- Accepts invitation and completes Enrollment form (Part 2)
Member Enrollment Workflow

Member Enrollment via My AmeriCorps Invitation Process

Program/Service Location
Enters or upload service invitation

Applicant
Registers & complete the Enrollment Form (Part 1)

Program/Service Location
Completes and approves Enrollment Form (Part 2) and activates term

Member
Start serving
Welcome Alyson

Portal Home
- Trainee Profile
- Search Potential Applicants
- Search Submitted Applications
- Manage Members
- Invite Members
- Manage Events
- Manage Programs
- Manage Service Locations
- Manage Users
- Recruitment Workbasket

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Workbasket

Pending Applications Pending Invitations Pending Enrollments Status Change Requests Pending Exits

Results 1 Through 3

<table>
<thead>
<tr>
<th>Applicant</th>
<th>Listing</th>
<th>Date Submitted</th>
<th>Status</th>
<th>Available</th>
<th>Date Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>Julie Woodland</td>
<td>Serving Community</td>
<td>12/24/2008</td>
<td>Selected</td>
<td>01/10/2009</td>
<td></td>
</tr>
<tr>
<td>Kathy Jones</td>
<td>Serving Community</td>
<td>01/10/2008</td>
<td>Selected</td>
<td>06/01/2007</td>
<td></td>
</tr>
<tr>
<td>Peter Smith</td>
<td>Serving Community</td>
<td>01/10/2008</td>
<td>Selected</td>
<td>08/22/2006</td>
<td></td>
</tr>
</tbody>
</table>

Click on Invite Members on the left navigational panel
Invite Members

Enter member’s data and select the program, grant year and member’s service location.

Click on Add Another to send the current invitation and enter another invitation.

Click Save to send one invitation and return to your home page.

Click Cancel to discard any entries you made.

Invite Member

After completing the following fields with member and program information, the member will receive an email with information for Portal registration and the ability to complete the member portion of the enrollment form. Click "add another" to send another invitation after this one; otherwise, click "save invitation" to just send this one invitation. Click here for help.

* First Name: 
* Middle Name: 
* Last Name: 
* Social Security Number: 
* Verify Social Security Number: 
* Date of Birth: Enter Date dd/mm/yyyy 
* E-Mail Address: 
* Program Year: 
* Program Title: City Year New York AmeriCorps National - New York, NY 
Service Location: Select

Cancel  Add Another  Save

Batch Uploads

If you would like to submit a batch of member information to receive invitations, you may upload a XML file via the Batch Invitation Form.
Invite Members – Batch Invitations

Make sure the XML file you want to upload meets the specifications defined in the XML Schema Definitions (XSD).

Choose the Program Year, Program Title and Service Location. Click Browse to select the XML file you want to upload.

Click Upload.
Enroll Members
(Enrolling members who were invited through the invitation process)

Until the invitee or you complete the member’s portion of the enrollment form, the members who were invited through the invitation process will be listed under “Pending Invitations”.

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

Click the member’s name to open the enrollment form.

Click Delete if you are not going to enroll the member.

Until the invitee or you complete the member’s portion of the enrollment form, the members who were invited through the invitation process will be listed under “Pending Invitations”.

Julie Wood  Service Recovery  04/30/2009  2009  Delete?
Enroll Members

(Enrolling members who were *invited through the invitation process*)

If you are going to complete the member’s portion of the enrollment form, you should complete it using the information given in the enrollment form that was signed by the member.
Enroll Members
(Enrolling members who were *invited through the invitation process*)

1. Enter the member’s start date and select Program Year, Program Title, Service Location and Slot Type. Select the checkbox to certify your portion of the enrollment.

2. Click **Save Information** to save the enrollment data without activating.

3. Click **Enroll Member** to activate the member’s enrollment.

4. Click **Cancel** to discard any changes made.

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Enroll Members

(Enrolling members who were *invited through the invitation process*)

The member's enrollment form will appear under the "Pending Enrollments," if you had clicked on "save information" on the member enrollment form from the "Pending Invitations" section or if the invitee had completed the member's portion of the enrollment form.

<table>
<thead>
<tr>
<th>Name</th>
<th>Program</th>
<th>Program Year</th>
<th>Role</th>
<th>Date Submitted</th>
<th>Request Type</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Julie Woodland</td>
<td>Serving Community</td>
<td>0</td>
<td></td>
<td>03/08/2009</td>
<td>Invitation</td>
<td></td>
</tr>
<tr>
<td>Ryan EmailTest63</td>
<td>Testing #4</td>
<td>2009</td>
<td></td>
<td>06/25/2009</td>
<td>Invitation</td>
<td></td>
</tr>
<tr>
<td>Another test</td>
<td>Testing Recovery</td>
<td>0</td>
<td></td>
<td>06/19/2009</td>
<td>Invitation</td>
<td></td>
</tr>
</tbody>
</table>
Enroll Members
(Enrolling members who were selected through My AmeriCorps application process)

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

Click the member’s name to open the enrollment form.

Click Delete if you want to delete the enrollment form.
Enroll Members

(Enrolling members who were selected through My AmeriCorps application process)

If the member has completed his/her portion of the enrollment form, the data will be displayed in read mode. In this case, you may scroll down to the bottom and enter information about the member’s term.

If the member has not completed his/her portion, you can complete it using the information given in enrollment form that was signed by the member.

Required fields are marked with an asterisk (*)
Enroll Members

(Enrolling members who were selected through My AmeriCorps application process)

Enter the member’s start date and select Program Year, Program Title, Service Location and Slot Type. Select the checkbox to certify your portion of the enrollment.

Click Save Information to save the enrollment data without activating.

Click Enroll Member to activate the member’s enrollment.

Click Cancel to discard any changes made.
What’s next?

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

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

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