Preparation for the Launch of My AmeriCorps

eGrants … “Gateway” to My AmeriCorps
Agenda

- Overview of the System
  - Phases of My AmeriCorps
  - Who does what on My AmeriCorps?
- User Role Information
  - Grantee Administrator User Role Defined
  - My AmeriCorps Access Flow Chart
  - My AmeriCorps User Roles Defined
  - Access Levels Defined
  - User Roles Map
  - Important Considerations
- In Preparation for Launch
  - Sample Screens
  - Reporting
  - WBRS Work during Transition
- Resources and Training
- To Do List
- Additional Help and Support
# Current Functionality of My AmeriCorps

<table>
<thead>
<tr>
<th>Phase 1</th>
<th>Phase 2</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Members Can:</strong></td>
<td><strong>Grantees Can:</strong></td>
</tr>
<tr>
<td>• Modify contact information</td>
<td>• Create service opportunity listings</td>
</tr>
<tr>
<td>• View and print 1099 forms</td>
<td>• Access applicant’s contact information and profile</td>
</tr>
<tr>
<td>• Complete student loan forbearance forms</td>
<td>• View and approve applications</td>
</tr>
<tr>
<td>• Access service certification letters</td>
<td>• Review reference(s) submitted with applications</td>
</tr>
<tr>
<td>• Use the features and forms in the AmeriCorps Online Payment System</td>
<td><strong>CNCS Staff Can:</strong></td>
</tr>
<tr>
<td>• Search for and view project descriptions</td>
<td>• Access applicant’s contact information, profile and personal information</td>
</tr>
<tr>
<td>• Complete applicant profile</td>
<td>• View applications</td>
</tr>
<tr>
<td>• Complete an application and access a customized applicant homepage</td>
<td></td>
</tr>
</tbody>
</table>
New Functionality in My AmeriCorps

Phase 3

- Search for members serving in your program(s) and access their information
- Search for programs
- Send invitations to applicants to register and complete the enrollment form
- Monitor pending member enrollments, in-service status change requests, and exits
- View and manage slots
- Run member and program reports
Who Does What in My AmeriCorps?

My AmeriCorps

**Applicants, Members, & Alumni Users**
- Register on My AmeriCorps
- Search for Service Opportunities
- Apply for Service
- Submit Forms
- Accept/Reject Service Invitations
- Enroll
- Serve
- Complete Service & Survey
- Exit Service & Receive Education Award
- Access Alumni Services

**Program and CNCS Staff Users**
- Register on My AmeriCorps
- Create Service Opportunities
- Recruit Members
- Accept/Reject Applications
- Submit Service Offers
- Enroll & Place Members
- Create & Approve Changes in Service
- Exit Members
- Provide Member & Program Oversight

eGrants Coaching Unit
Grantee Administrator User Role Defined

- **Grantee Administrator for AmeriCorps National Grantee:**
  - An eGrants user role that gives full access to My AmeriCorps functionality.
  - Applies only to the **national legal applicant organization** (exception: an operating site has or has had a state sub-grant through another program type).
  - Has access to all grants, operating sites, and service locations of the national legal applicant organization.
  - Can approve all requests.
  - Manages organizational information and all users at the legal applicant organization.
My AmeriCorps User Roles Defined

- **Grantee Recruiter:**
  Manages most recruitment functions such as creating service listings and processing applications (enrollment is a role in Grantee Member Management).

- **Grantee Member Management:**
  Manages program(s) and members, including enrollment; *requires an access level:*
  - Enroll Members
  - Exit Members
  - Manage change of status for members
  - Manages slots
Access Levels Defined

Prime: Refers to a grant to the national legal applicant organization.

Operating Site: Refers to a sub-site for the national program.

Service Location (new term): Refers to an exact location where a member serves.
## Grantees User Roles Map

<table>
<thead>
<tr>
<th>Manage Programs</th>
<th>Grant Recruiter</th>
<th>Grant Administrator</th>
<th>State and National Grant Management</th>
<th>Access to Prior or National Grant</th>
<th>State and National Grant Management</th>
<th>Access to Sub Grant or National Operating Site</th>
<th>State and National Grant Management</th>
<th>Access to only one or many Service Locations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search Programs and Operating Sites</td>
<td>-</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
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<tr>
<td>View Prime</td>
<td>-</td>
<td>+</td>
<td>+</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Edit Program</td>
<td>-</td>
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<td>+</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>View Service Locations</td>
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<td>+</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>View Members</td>
<td>-</td>
<td>+</td>
<td>+</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Operating Site Info</td>
<td>-</td>
<td>+</td>
<td>+</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>View Operating Site</td>
<td>-</td>
<td>+</td>
<td>+</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>View Previous Operating Sites</td>
<td>-</td>
<td>+</td>
<td>+</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Renew Previous Operating Site</td>
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<td>+</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Create Operating Site</td>
<td>-</td>
<td>+</td>
<td>+</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>View Operating Site</td>
<td>-</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Edit Operating Site</td>
<td>-</td>
<td>+</td>
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<td>+</td>
<td>-</td>
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</tr>
</tbody>
</table>
Important Considerations

- My AmeriCorps does not include comprehensive compliance checks.
- Grantees must set their own policies about system use and monitor usage for compliance.
- Contact AmeriCorps Program Officers regarding compliance questions,
- My AmeriCorps training focuses on the functionality of the system rather than grant requirements or program policies
Sample Screens - Workbaskets

Tasks requiring your attention are grouped by activity such as enrollments, exits, status change requests.
The fastest way to search for a specific member is by entering the Member ID number.
### Workbasket

#### Pending Exits

Click here for help.
Results 1 Through 10

Your search returned 1204 results.

<table>
<thead>
<tr>
<th>Name</th>
<th>Program Name</th>
<th>Service Location</th>
<th>Expected Completion Date</th>
<th>Status</th>
<th>Exit Form?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Julie Woodland</td>
<td>Serving Community</td>
<td></td>
<td>06/18/2009</td>
<td>Suspended</td>
<td>Not Started</td>
</tr>
<tr>
<td>John</td>
<td>Serving Community</td>
<td>12</td>
<td>06/25/2009</td>
<td>In-Service</td>
<td>Submitted</td>
</tr>
<tr>
<td>Mary</td>
<td>Serving Community</td>
<td>12</td>
<td>06/19/2009</td>
<td>In-Service</td>
<td>Not Started</td>
</tr>
<tr>
<td>Robert</td>
<td>Serving Community</td>
<td></td>
<td>04/13/2010</td>
<td>In-Service</td>
<td>Submitted</td>
</tr>
<tr>
<td>Elizabeth</td>
<td>Serving Community</td>
<td></td>
<td>06/18/2009</td>
<td>In-Service</td>
<td>Not Started</td>
</tr>
</tbody>
</table>
Reporting in My AmeriCorps

Please select a report type and appropriate criteria below. Then click 'submit' to generate the selected report. Depending on the type of report and the criteria selected, your report may take a few minutes to generate. Please be patient and do not reload the page.
In Preparation for Launch: WBRS Work

- Enrollment, Exit and Change of Status or Term actions in pending status will not transfer to My AmeriCorps from WBRS.
- CNCS will issue guidance on deadlines for completing actions in WBRS.
- WBRS will be available in read-only mode for a specified time after launch.
Resources and Training

Resource Center

(www.nationalserviceresources.org/ac-training-support):

- Tutorial: General Overview of My AmeriCorps
- Tutorial: Create and Manage an eGrants Account
- Tutorial: User Roles and Management (to be posted _______)
- User roles map (xls file for download)

One month prior to launch register webinars
Resources and Training

www.nationalserviceresources.org/ac-training-support

- Two weeks prior to launch
  - Attend webinars on “User Roles and Management”
  - Tutorials available
    - Member Management
    - Program Management
    - Recruitment and Enrollment
    - Reporting
- At launch attend webinars
  - Member Management
  - Program Management
  - Recruitment and Enrollment
To Do List

- Discuss and assign user roles and management responsibilities.
- Address WBRS transition tasks.
- Check all current systems and make sure replacements are in place to maintain compliance – i.e. time keeping, financial records, etc.
- Ask questions to AmeriCorps Program Officers.
  - Questions will be included as FAQ on [www.nationalserviceresources.org/ac-training-support](http://www.nationalserviceresources.org/ac-training-support)
Additional Help and Support

- The Resource Center
  - [www.nationalserviceresources.org/ac-training-support](http://www.nationalserviceresources.org/ac-training-support)
  - Tutorials
  - Access to live webinar 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