My AmeriCorps Release 3
AmeriCorps National Programs
Program Management
This presentation is designed for AmeriCorps National Programs. It will guide you through managing operating sites, service locations and slots, and show how to view a member roster.

We will also demonstrate how to transfer slots across programs. (For information on who can perform this function, please view the tutorial on User Roles and Management – Understanding and Planning.)

If you haven’t already seen it, please check out the General Overview presentation before proceeding with this one. We assume for this presentation that you’ve been exposed to the basic features and navigation of My AmeriCorps.
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 Director or Program Officer.

eGrants Coaching Unit
Agenda

- Access My AmeriCorps
- Search for Primes or Operating Sites
- View Operating Sites
- Renew Operating Sites
- Create a New Operating Site
- Allocate Slots
- Edit Operating Site Information
- Service Locations
- Member Roster
- Slot Management
- Transfer Slots
- Search for Service Locations
- What’s Next?
After logging onto eGrants, click on Portal Home to enter My AmeriCorps.
Your home page displays workbasket tabs. Each tab displays a list of actions awaiting completion. Service Location users do not have workbaskets.
Before viewing Prime or Operating Site Information, you have to find it. Click on **Manage Programs** to start the search.
Grant and Slot Management Tasks

Search for a Prime or Operating Site in order to complete these tasks:

• Creating a new operating site or renewing an old one
• Allocating slots to an operating site
• Viewing or editing Prime or Operating Site information,
• Viewing or converting standard or refill slots
• Transferring standard slots across operating sites, and
• Viewing a list of members assigned to a Operating Site or service location.
Search for Primes or Operating Sites

Select and/or enter identifying information to start a search. Click on search to see the results.

Program Search Attributes

To search for a program use the fields below and click the search button.

- Program Year: Select
- Project Title:
- Program Code: Select
- City:
- State: Select

search
Search for Primes or Operating Sites

The results page shows the total number of grants or operating sites meeting search criteria.

Use the page navigation to scroll through the pages. You can sort the listing by the column title.

Sort the results by clicking the link in the column title.

<table>
<thead>
<tr>
<th>Grant Number</th>
<th>Project Title</th>
<th>Program Year</th>
<th>City</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td>94ASCMA0220101</td>
<td>City Year Boston</td>
<td>1995</td>
<td>Boston</td>
<td>NA</td>
</tr>
<tr>
<td>94ASCMA0220101</td>
<td>City Year Boston</td>
<td>1996</td>
<td>Boston</td>
<td>NA</td>
</tr>
<tr>
<td>94ASCRG410201</td>
<td>City Year Rhode Island</td>
<td>1994</td>
<td>Providence</td>
<td>RI</td>
</tr>
<tr>
<td>94ASCRG410201</td>
<td>City Year Rhode Island</td>
<td>1995</td>
<td>Providence</td>
<td>RI</td>
</tr>
<tr>
<td>94ASCRG410201</td>
<td>City Year Rhode Island</td>
<td>1996</td>
<td>Providence</td>
<td>RI</td>
</tr>
<tr>
<td>94ASCTX0451601</td>
<td>City Year San Antonio</td>
<td>1995</td>
<td>San Antonio</td>
<td>TX</td>
</tr>
<tr>
<td>94ASCTX0451601</td>
<td>City Year San Antonio</td>
<td>1996</td>
<td>San Antonio</td>
<td>TX</td>
</tr>
<tr>
<td>94ADNMA006</td>
<td>City Year - Parent</td>
<td>1997</td>
<td></td>
<td></td>
</tr>
<tr>
<td>94ASCTX0451601</td>
<td>City Year San Antonio</td>
<td>1997</td>
<td>San Antonio</td>
<td>TX</td>
</tr>
<tr>
<td>94ASCRG410201</td>
<td>City Year Rhode Island</td>
<td>1997</td>
<td>Providence</td>
<td>RI</td>
</tr>
</tbody>
</table>
Click on the name of the Prime or Operating Site to perform other grant-related functions.
The Program Information links provide quick access to perform other grant-related functions and are specific to the program listed.

Information about the Parent Organization and links to perform other tasks.
Click on Operating Site Info to view a listing of all operating sites or to renew or create one.
View Operating Sites

Your active operating sites will be listed here.

<table>
<thead>
<tr>
<th>Program Code</th>
<th>Operating Site</th>
<th>Program Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>09HD-MA0010001</td>
<td>City Year Chicago</td>
<td>2009</td>
</tr>
<tr>
<td>09HD-MA0010002</td>
<td>City Year Columbia</td>
<td>2009</td>
</tr>
<tr>
<td>09HD-MA0010003</td>
<td>City Year Columbus</td>
<td>2009</td>
</tr>
<tr>
<td>09HD-MA0010004</td>
<td>City Year Columbus</td>
<td>2009</td>
</tr>
<tr>
<td>09HD-MA0010005</td>
<td>City Year Washington, D.C.</td>
<td>2009</td>
</tr>
</tbody>
</table>
Click on View Previous Operating Sites to renew a previously used operating site.
To renew an operating site, click the box next to each operating site. Click on it again to unselect it.

Click **All** to select all operating sites or **None** to deselect them. Click renew operating sites to make the selected operating sites available for use.
Click on **OK** to continue with the process or **Cancel** to return to the Renew Operating Sites page.
The renew process was successful and the operating site is available for use.
Create a New Operating Site

Click on create operating site to enter the details of a new operating site.

You can access this page from the Operating Site Info link.
Create a New Operating Site

- Enter the details of the new operating site.
- Click on save to continue the process or cancel to return to the operating sites listing page without saving.
Create a New Operating Site

The operating site was created and is now available for use.
Allocate Slots

Click on Slot Allocation to assign slots to operating sites.

### View Operating Sites

<table>
<thead>
<tr>
<th>Program Code</th>
<th>Operating Site</th>
<th>Program Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>D9ND-HMAC01.0001</td>
<td>City Year Chicago</td>
<td>2009</td>
</tr>
<tr>
<td>D9ND-HMAC01.0002</td>
<td>City Year Columbus</td>
<td>2009</td>
</tr>
<tr>
<td>D9ND-HMAC01.0003</td>
<td>City Year Columbus</td>
<td>2009</td>
</tr>
<tr>
<td>D9ND-HMAC01.0004</td>
<td>City Year Columbus</td>
<td>2009</td>
</tr>
<tr>
<td>D9ND-HMAC01.0005</td>
<td>City Year Washington, D.C.</td>
<td>2009</td>
</tr>
<tr>
<td>D9ND-HMAC01.0006</td>
<td>City Year New York</td>
<td>2009</td>
</tr>
<tr>
<td>D9ND-HMAC01.0007</td>
<td>New Operating Site Text 1</td>
<td>2009</td>
</tr>
</tbody>
</table>

View Previous Operating Sites

create operating site
To allocate slots to an operating site, click on the name of the operating site from the list.
Allocate Slots

| Slots Information          | Parent Budget | Overall Sublocation | Program Sublocation | New Sublocation
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Slots</td>
<td>MSYSs</td>
<td>Slots</td>
<td>MSYSs</td>
</tr>
<tr>
<td>Full Time [1]</td>
<td>Living Allowance</td>
<td>100</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>No Living Allowance</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>One Year Half Time [0.5]</td>
<td>Living Allowance</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>No Living Allowance</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Two Year Half Time [0.5]</td>
<td>Living Allowance</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>No Living Allowance</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Reduced Half Time [0.30]</td>
<td>Living Allowance</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>No Living Allowance</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Quarter Time [0.26]</td>
<td>Living Allowance</td>
<td>10</td>
<td>2.65</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>No Living Allowance</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Minimum Time [0.21]</td>
<td>Living Allowance</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>No Living Allowance</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Total</td>
<td>Living Allowance</td>
<td>110</td>
<td>102.65</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>No Living Allowance</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Grand Total</td>
<td>Living Allowance</td>
<td>110</td>
<td>102.65</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>No Living Allowance</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

The total slots and MSYs granted to the Parent Organization.

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
- SNV Workbasket
- SNV Reports
- VISTA Workbasket
- VISTA Reports

Program Information
Program
City Year - 2009
09H00MA001
Program Info
- Operating Site Info
- Service Location Info
- Slot Info
- Slot Transfer
- Slot Allocation

eGrants Coaching Unit
The total slots and MSYs currently allocated to other operating sites.
The total slots and MSYs currently allocated to this operating site.
Enter the new slot allocation for each slot type and click on **save**. You may increase or decrease slots.
The slot allocation has been saved.
Edit Operating Site Information

Click on **Edit Operating Site** to edit the details of the Program.

Get to this page with the **Program Info** link.
Modify contact information.
Modify the Enrollment Period dates by typing them in or use the pop-up calendar.
Caution!

Although the Enrollment Period dates can be modified, care should be taken to ensure that the new dates remain within the Budget Period dates and the new dates do not overlap with the Member Enrollment Period dates of a different program year for the same operating site.

Also it is recommended that national programs put policies in place and monitor the system to ensure that users are not making errors. In the past, changing dates was something only Program Officers could do. Now any grantee administrator or member management user at the Prime or Operating Site level can do it.
Click on **save** to keep your changes or **cancel** to discard them.
If errors are encountered, you'll see a note here.
After successfully saving the Operating Site information, a note is displayed confirming that the information was updated.
Service Locations

Use the View Service Locations link or the Service Location Info link to view a listing of the Service Locations assigned to the Operating Site.
The total number of service locations and a listing of the service locations assigned to the Operating Site is displayed. Click on **create** to enter a new service location.
Select and enter information about the service location. Click on **save** to keep the information or **cancel** to discard it.
Service Locations

Click on edit to make changes to the service location or back to view the listing of service locations page.

View the Operating Site Information page.
The new service location is displayed. Click on the name to view or edit the details.
Click on **edit** to change the information or status of the service location or **back** to return to the list of service locations.
Member Roster

View the details of the Operating Site.
Click on View Members to view the Member Roster.
The View Roster page displays the total number of members, navigation to scroll through the pages, and a listing of members. Sort the listing by the column title. Click on the member’s name to view or edit contact information or to manage the member’s service assignment.
A different set of links appears to manage the member’s service assignment.
Member Roster

Click on Portal Home to return to your my AmeriCorps Home Page or click Manage Programs to search for a Prime or Operating Site.
Slot Management

Click on Slot Info to view the current configuration of standard and refill slots.
The View Slot Budget page displays the slot configuration for standard and refill slots.

Grantee Admin and State / National Grantee Prime users can view the aggregate slots for a grant. Operating Site users can view slots assigned to their grant. Service Location users do not have access to Slots Management functions.
Click on edit standard or Slot Conversion to update the standard slot configuration.
The New Allocation number should not be less than the number shown for Filled Slots.

Enter the new slot allocation by slot type. Enter 0 if all the slots are being removed.
Click on **validate** to ensure that the new MSYs are not greater than the budgeted MSYs. Click on **submit** to update the slot configuration.
MSYs were reduced from 97.5 to 97.38. The next slot conversion will be calculated on the new MSYs of 97.38, but the total reduction in MSYs must not exceed the MSYs of a minimum time slot.
Slot Management

Click on **edit refill** or **Refill Slot Conversion** to update the refill slot configuration.
Enter the new refill slot allocation by slot type. Enter 0 if all the refill slots are being removed. Use whole numbers only.

Standard slots have not been filled. Refill slots are shown, but are not available.

Standard slots are not available. Refill slots can be entered for this slot type.
Refill Slot Rules

- Processes and principles apply for editing refill slots as standard slots.
- Refill slots automatically become visible on the Slot Budget page when a program exits a member who served less than 30% of their term and the member did not receive an award.
- A refill slot is not available for use until all of the standard slots of the same slot type have been filled.
- Refill slots can only be used once, even if the member occupying the refill slot does not complete their term.
- When converting refill slots, make sure that the New Allocation number is \( \geq \) the filled refill slots for each slot type.
Click on **validate** to ensure that the new MSYs are not greater than the total MSYs. Click on **submit** to update the refill slot configuration.
MSYs were reduced from 8.5 to 8.47. The next refill slot conversion will be calculated on the new MSYs of 8.47.
If you are not viewing Operating Site information, click on Manage Programs and select from the search result page the operating site that you wish to transfer slots from. If you are already viewing the operating site information of the operating site you wish to transfer slots from, click on Slot Transfer.
If you are viewing your grant information, click on **Slot Transfer** then select the “transfer from” Operating Site from the list.
Transfer Slots

Slots are not available to transfer note.

Operating Site Information

Please note the following error:
* This subprogram has no slots available to transfer.

Click here for help.

Program Year: 2008
Operating Site Name: City Year Washington, DC
Operating Site Code: 06ACHDC0010003
Contact Name: 
140 Q Street NE
Contact Address: 2nd Floor
Washington, DC 20002 - 2132
Contact Email: test@grants.gov
Contact Phone: (202) 776-7760
Budget Period: 07/01/2008 - 06/30/2009
Enrollment Period: 07/01/2008 - 06/30/2009
Select the slot type from the drop down box, enter the total number of slots and select the Operating Site the slots are being transferred to. Click transfer.
MSYs were reduced from 97.38 to 96.88 after transferring out 1 One Year Half Time slot.

Transfer was successful.
Click on **Manage Service Locations** to search for service locations.
Enter identifying information about the service location (s) to start a search. Click on search to see the results.
The Service Location Results page displays only the service locations you have access to. Use the numbered navigation to scroll through the pages and the column title to sort the listing.

Click on the name of the operating site or service location to view details.
What’s next?

• The Resource Center
  o 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