



My AmeriCorps

Work Flow & Processes

AmeriCorps State Grantees

Release 1, 2 & 3

Agenda



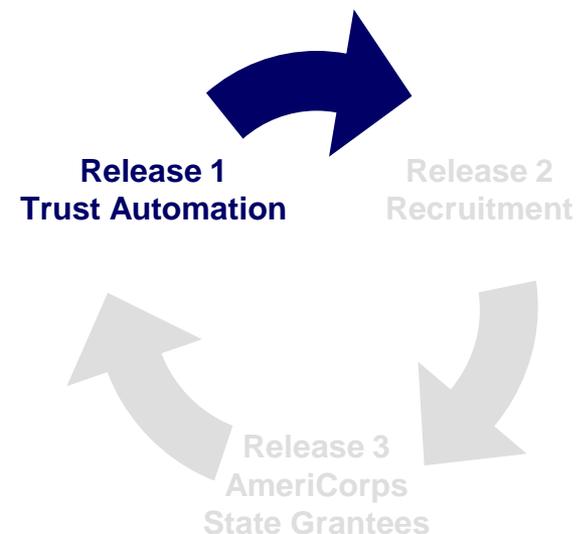
- Release 1: Trust Automation
- Release 2: Recruitment
- Release 3: AmeriCorps State Grantees
- Pre-Training Questions

For step-by-step instructions on specific My AmeriCorps functions, subject related tutorials are posted on <http://nationalserviceresources.org/ac-training-support-state>

Release 1: Trust Automation

Release 1 of My AmeriCorps facilitates applicants and members in registering, automating required forms and linking members directly to their awards and service term information for all AmeriCorps programs.

- **Flow Chart & Users**
- **Processes**
- **Process Notes**



Release 1: Flow Chart & Users



Release 1: Processes

Applicants / Members

- Register / Create Profile
- Update Contact Information
- View Checklist of Required Forms
- Print / Complete Required Forms
- View Listing of Service Terms
- View Award Disbursements
- Print Award Letters
- Request Assistance

Release 1: Profile Creation

- Applicants/members must have an email address to register.
- During this process the applicant/member enters their personal information and information about the skill sets.
- To complete this process, the member will receive an email with additional instructions and a link to create their username and password. This process should be completed within the time frame listed in the email (72 hours).
- The profile information is inherited into applications and enrollment forms which reduces errors and eliminates entering the same information more than once.
- Applicants/members have access to update their profile information when necessary.

Release 1: Correct SSN / Date of Birth

- The SSN can be corrected only by CNCS staff. The applicant or member should use the “Contact My AmeriCorps” link to submit a request or call 1-800-942-2677. Additional instructions will be provided.
- Grantee or CNCS staff can correct the name and date of birth.

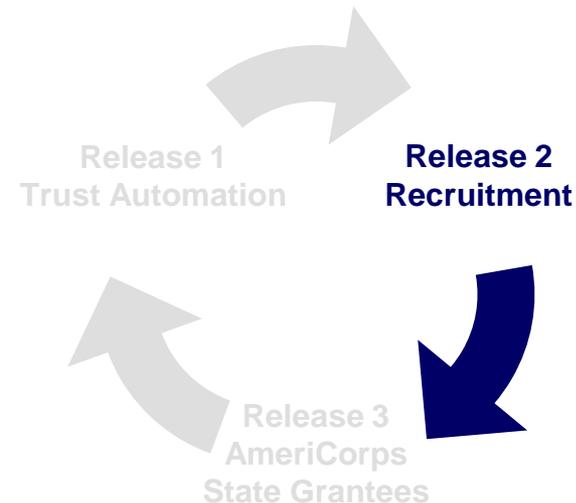
Release 1: Previous Terms Not Listed

- The SSN on previous terms is incorrect or an incorrect SSN was used during the registration process.
- Previous terms were not entered into WBRS or problems occurred during the transition.
- Members should use the “Contact My AmeriCorps” link or call 1-800-942-2677 for assistance.
- Grantees should first verify if the term exists in My AmeriCorps and contact their Trust Officer for assistance if it does not.

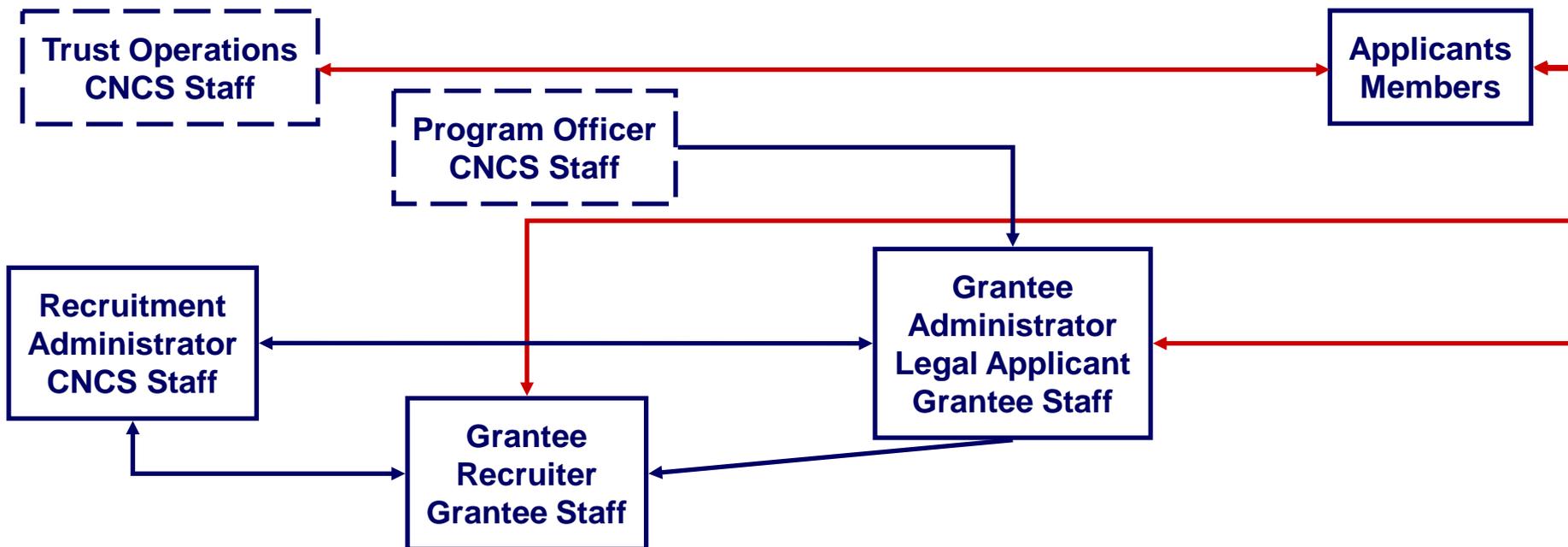
Release 2: Recruitment

Release 2 of My AmeriCorps facilitates the grantees in their recruitment efforts and the applicants and members in applying to service opportunities.

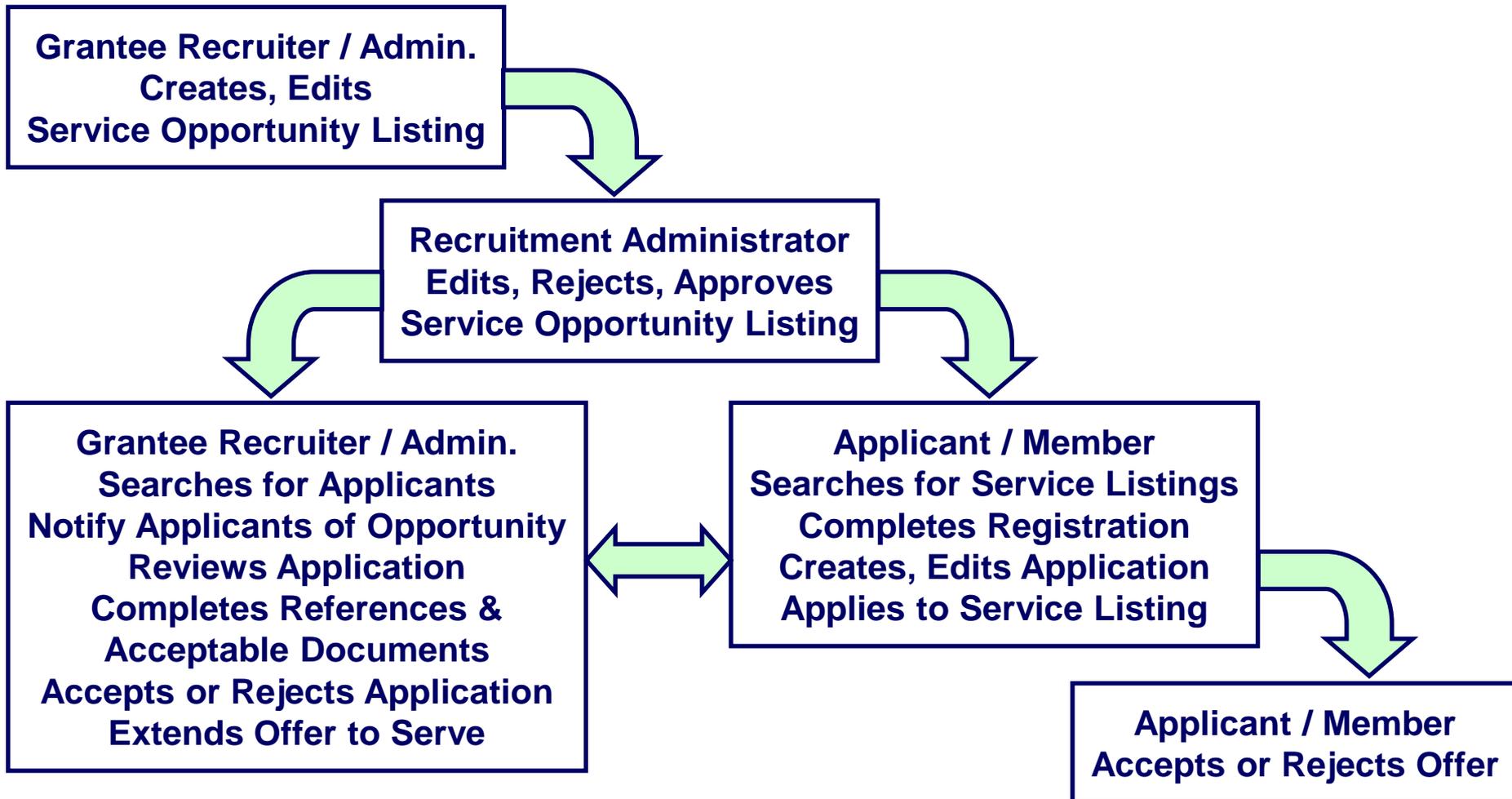
- **Flow Chart & Users**
- **Application Process**
- **Process Notes**



Release 2: Flow Chart & Users



Release 2: Application Process



Release 2: Service Opportunity Listings

- Service Opportunity Listings can be modified after it's been approved. The reason for the modification must be entered and the listing will have to be approved again.
- During the second approval phase, applicants can apply to the original listing. The new information will not be available until the listing has been approved again.
- Grantees are not able to see other listings that a member applied to, were accepted into or rejected from.
- The use of the Recruitment functions is not required. You may have other means of recruiting applicants.
- Using the Recruitment functions provides access to reach a broader range of applicants and skill sets that best fit the goals of the program.

Release 2: Application

- Members can search for service opportunities before creating their profile, but the Create Profile process must be complete before applying to a service opportunity.
- Information entered during the Create Profile process is inherited into applications and enrollment forms.
- Up to 2 versions of an application can be created and a completed application can be submitted to up to 10 Service Opportunity Listings.
- Up to 4 references can be created, but only 2 can be submitted with an application. References must be submitted even if your grant does not require them.
- Several offers to serve can be received, but only one offer can be accepted. Other offers to serve will be withdrawn as soon as an offer has been accepted.

Release 2: Application References

- The References section of the application must be complete before the applicant can be selected into service.
- If your grant does not require the use of references, the Reference Override function allows you to complete the reference before proceeding to the selection process.
- Applications can be rejected without completing the References.

Release 2: Acceptable Documents

- A range of documents are listed, some of them may not be acceptable for your grant. The acceptable document should be selected based on the requirements of your grant.
- Notification of the type of acceptable document selected is not provided.

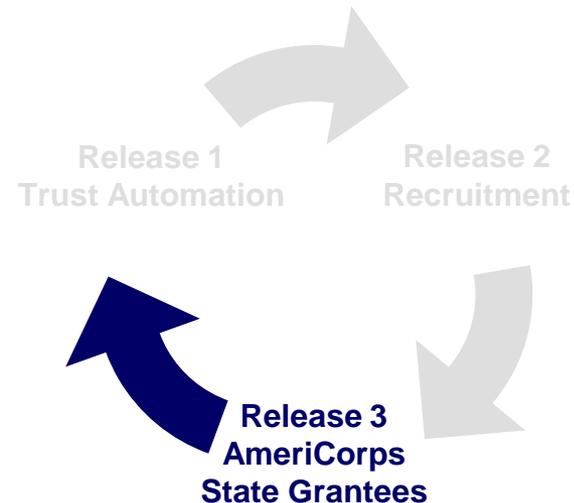
Release 2: Application Selection

- Your decision to accept or reject an application can not be changed after it's been submitted.
- The applicant is notified of changes to the status of their application.

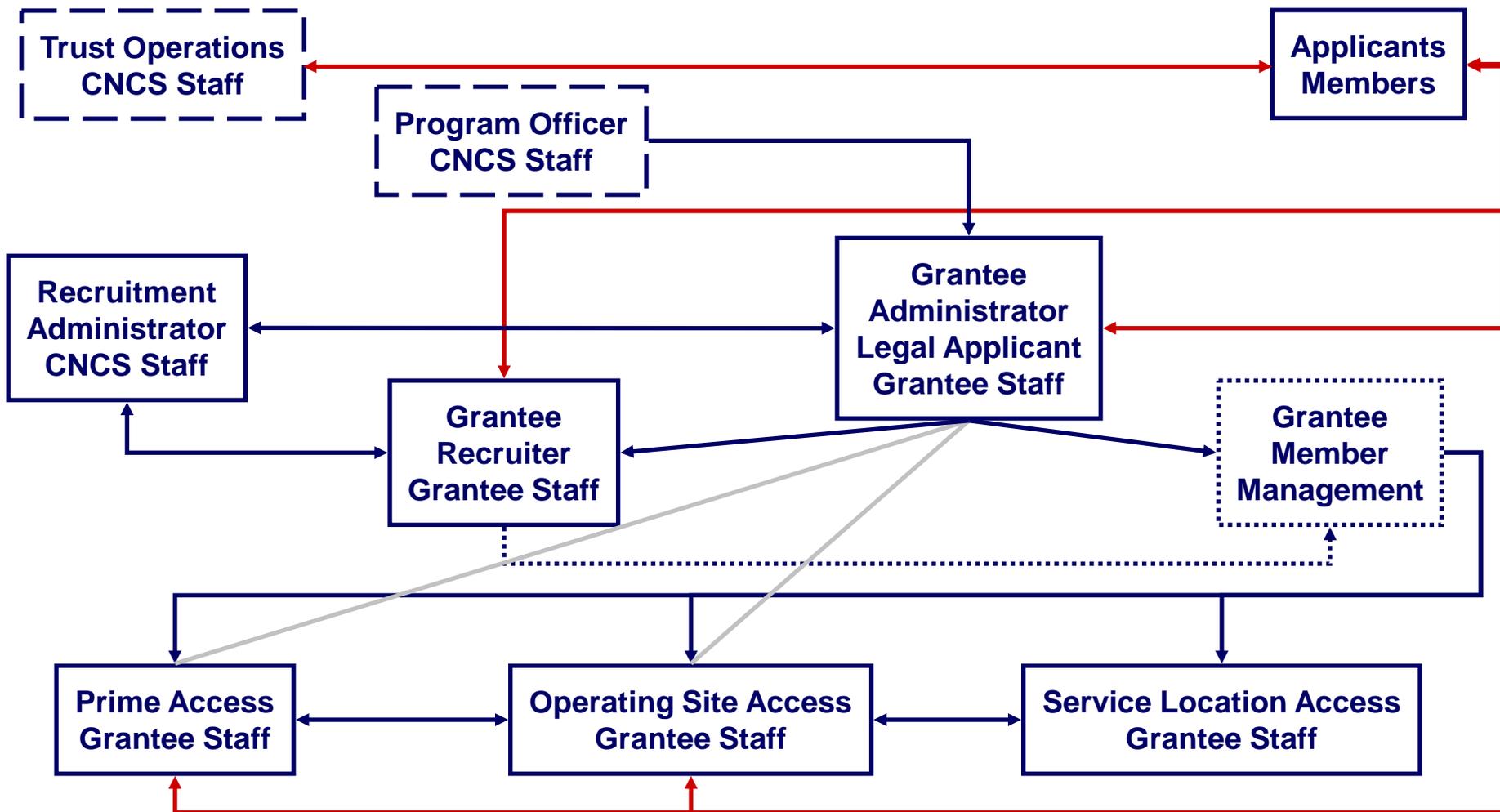
Release 3: AmeriCorps State Grantees

Release 3 of My AmeriCorps facilitates AmeriCorps grantees in managing their programs, slots and users; processing enrollments, change of status, transfers and exits; and reporting.

- **Flow Chart & Users**
- **Processes**
- **Process Notes**



Release 3: Flow Chart & Users



Release 3: Processes

Prime / Operating Site Access

Can create / edit / approve

- Invitations,
- Enrollments,
- In-Service Changes (includes term changes, suspensions, reinstatements, transfers),
- Exits,
- Standard & Refill Slot Corrections,
- Grant Contact Information, and
- Service Locations.
- Manage Users
- Reporting

Service Location Access

- Create In-Service Changes (includes term changes, suspensions, reinstatements, transfers)
- Edit Service Location Information

NOTE: These processes are available to the Grantee Administrator user. Also, only the Grantee Administrator at the State Commission level can approve term changes after 90 days.

Release 3: User Roles / Access Levels

- User roles are assigned through eGrants and access levels are assigned through My AmeriCorps.
- Grantee staff can have a Grantee Recruiter and Grantee Member Management user role. With the Grantee Member Management user role, an access level must also be assigned.
- There can be more than 1 grantee staff assigned to the Grantee Administrator user role.
- Operating Site users have the same access to their programs as the Prime users have for all of their programs.
- Service Locations users can create in-service actions for members assigned to their service location, but they can not approve them.

Release 3: Workbaskets

- Items listed in your workbasket have not been completed.
- Completed items are removed from the workbasket. Users should be diligent in monitoring the activities created as some processes are immediately approved and never reach the workbasket.
- Actions related to slots are not listed in a workbasket.

Release 3: Invitation Process

- The invitation process is generally used to enroll applicants/members recruited outside of the My AmeriCorps system.
- Once the invitation has been submitted, it will remain in your workbasket until it is deleted or completed.
- The applicant/member is notified to complete the enrollment form only once. Email the applicant/member directly to send a second notification or delete the invitation and submit it again.
- If the applicant/member does not have an email address, use your email address to send the invitation.
- Grantees can complete the invitation process by completing the member's portion of the enrollment form on behalf of the applicant/member. In this case, a signed copy of the enrollment form must be retained.
- Applicants/members enrolled through this process will not complete the online application. You may have your own application for them to complete.

Release 3: Enrolling Members

- As soon as the enrollment form is approved (through the Enroll Member button), the Member's term is activated in the Trust.
- The complete enrollment form is not accessible to view all of the information entered on it as you would see on the hard copy. Use the reporting feature to view additional enrollment information.
- The slot type is reduced on the grant only after the member has been enrolled.
- The exit date is automatically set at the time of enrollment and is based on the slot type selected.
- If the Member completed their portion of the enrollment form, it is not required to retain a signed hard copy, however business practices set by your State Commission may require you to retain all copies.
- 2-Year PT members should be enrolled in a 2-Year PT slot. Their term will remain in the grant year they were enrolled in.

Release 3: Concurrent Terms

- Members can serve in a concurrent as long as the total MSYs of all terms (the initial term plus the current term) do not exceed 1 full time slot or 1 MSY.
- The Member must be exited from the concurrent term before being exited from the initial term.

Release 3: In-Service Changes

- Term changes entered incorrectly can be rejected before it's been approved.
- Term changes approved incorrectly can not be changed. Create a new term change with the correct information and a different date.
- Comments on a term change is not available.
- Members can not be suspended and reinstated on the same day.
- Suspensions entered incorrectly can be rejected before it's been approved.
- Suspensions approved in error can not be deleted or changed. Reinstatement the member effective the next day.

Release 3: Transfer Members

- Transfer-out members remain in your program until the new program accepts the transfer.
- Slots are returned to your program only when transfers are accepted by the new program.
- Accepting a transfer-in immediately enrolls the member into your program and the slots are adjusted on the grant.
- A new enrollment forms should not be created for transfer-in members.
- 2-Year PT members should not be transferred to the next year's grant to complete the 2nd year of their term. The member should remain in the grant year they were enrolled in.

Release 3: Exiting Members

- Service hours are not tracked in My AmeriCorps, but the total hours are entered on the exit form.
- After the exit form has been approved, you don't have the ability to view it as you would the hard copy.
- During the enrollment process, the member's exit date is automatically calculated. If the member is exiting 30 days or more before their exit date, you need to unlock the exit form to access it.
- As soon as the exit form is approved, the member's term is deactivated in the Trust.

Release 3: Slots Management

- Slots can be corrected by users with the Grantee Administrator's user role and the Prime and Operating Site access levels.
- The changes to the slot configuration is immediately available.
- Grantees are not notified when changes to the slot configuration are made.
- Slots can not be increased through the slot correction process and can only be decreased by the total MSYs of a Minimum Time slot.
- Grantee Administrators and Prime users can transfer slots across grants within the same grant year and grant type.
- Refill slots can not be used until all of the standard slots are filled and can not be transferred to a standard slot and vice versa.
- Refill slots can not be transferred to another grant or another grant year.
- Refill slots can be used only once.

Pre-Training Questions

- At this time you can't view the exit form for the member after you have submitted it-will this be changing?
- The term end dates when the members went from WBRS to e-grants changed. They were all defaulted to one full year term. Thus you have to go in and manually unlock their exit form so they will receive it. In the future will the terms all default to one year?
- The member received the exit form, did not complete it yet in e-grants it was marked as submitted with nothing completed on it. The member did finally complete the form and was able to be exited. Is this just a glitch in the system?