My AmeriCorps / eGrants

User Guide

VISTA Sponsors

Updated May 2021

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1.   Overview

Audience

The audiences for this User Guide are VISTA sponsors.

Purpose

The purpose of this User Guide is to provide you with a necessary tool to help you understand how to use My AmeriCorps ("the Portal") through the eGrants interface. It will also help you to understand the processes, benefits and functionality that are related to Recruitment, Member Management, and Close-of-Service.

Contents

In this User Guide, you will find an overview of the Portal with step-by-step instructions and screen shots. The focus for the VISTA Sponsor is on the following components and the User Guide will emphasize these processes:

- **Recruitment & Application Process**
- **V-81 Transportation Forms**
- **In-Service Training Requests**
- **CNCS Events**
- **Sponsor Verification Reports**
- **Future Plans Forms**

2.   New Users

2.1.   System Overview: Using eGrants/My AmeriCorps

If you are new to AmeriCorps VISTA, this section will provide you with a brief introduction to the system.

2.1.1 Hardware and Software Requirements

The following hardware, software, and settings are recommended to take advantage of all of eGrants' features:

Computer

eGrants works best on later model PCs or Macintosh computers of the Power Macintosh generation or later. Earlier or less powerful machines, such as 486 PCs or Mac Classics, may run acceptably when paired with a fast internet connection, assuming the computer contains sufficient memory to run one of the browsers specified below.

Internet Connection

eGrants can be accessed by machines using DSL, T1, cable modems, or dial-up connections using a modem rate of 28.8 K Baud or higher. It is not recommended that an "online service provider," such as AOL or Compuserve, be used to connect to eGrants, because they present special training issues for novice users.

Browser

eGrants works best with Microsoft Internet Explorer 4.0, Firefox 1.5, Netscape 3.0, or higher.

Browser Settings

Your web browser's popup blocker must be turned off in order for you to *edit* or *view* some eGrants pages.

It is not necessary to accept cookies or to have a Flash player loaded to view eGrants.

2.1.2 eGrants: Grants Management

eGrants is the AmeriCorps web-based system for:

- Submitting and tracking grant applications and concept papers;
- Peer-reviewing on-line grant applications;
- Negotiating and awarding grants and cooperative agreements;
- Managing grants and cooperative agreements including processing amendments, continuations; and
- Financial Status and Progress Reporting.

In short, eGrants is an online system designed to automate the entire grants and project management process from application to closeout. It allows applicants to find funding opportunities, apply for grants or projects, and manage grant reporting online. The system also allows AmeriCorps staff to review applications, award grants, and manage those grants and projects efficiently and effectively.

2.1.3 eGrants: Recruitment and Member Management

eGrants now also serves as the gateway to using (the My AmeriCorps) functions for recruitment and member management. These functions will be used within eGrants, but also connect to the My AmeriCorps member portal. Using this functionality, you can:

- Create and update VISTA project descriptions
- View member applications and references for your VISTA project
- Submit the Sponsor Evaluation and select applicants
- Approve assignment-related transportation forms (V-81), if needed
- View and sign member Future Plans Forms
- Generate sponsor verification reports
- Search for members serving on your project(s) and access their contact information

2.1.4 My AmeriCorps: Connecting Applicants & Members to Sponsors

As a VISTA sponsor, the data you enter and manipulate in eGrants with respect to Recruitment and Member Management is also part of the My AmeriCorps portal. For those of you who are new to My AmeriCorps, it is an online space designed to manage the AmeriCorps experience for our volunteers.

The application data you see when an individual applies is actually directly entered by the applicant using My AmeriCorps. When you select the individual for your project, their selection is immediately reflected in the customized home page for the applicant. My AmeriCorps links you to your applicants and members and vice versa.

The site is built to be interactive so that when a member applies to your program, you will receive an initial email notification. This also occurs when you receive a Future Plans form from a member. As you change the status of an application or request form, the applicant or member also receives an alert to check the status. This keeps the process as transparent and progressive as possible.
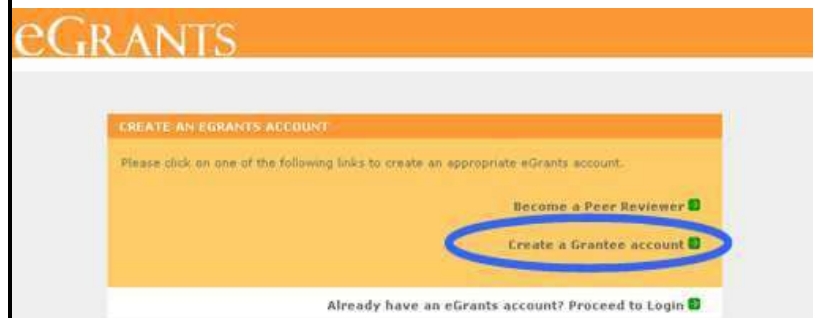
3. Create an eGrants Account

To use the functionality of the Portal, users must have an eGrants account. If you do not have eGrants accounts, you can create one from the eGrants login page (https://egrants.cns.gov).
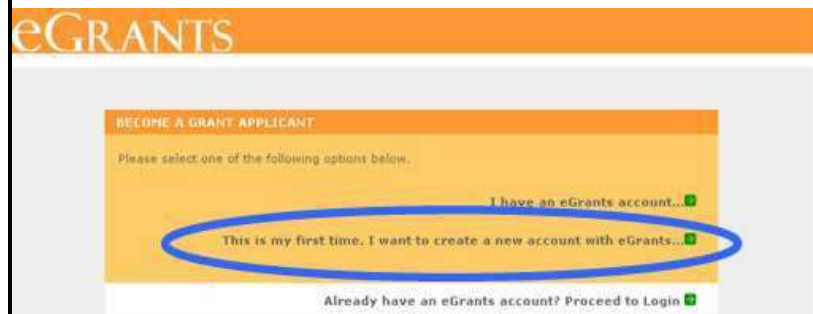
Process

1. Click on the "Don't have an eGrants account? Create an account" link to create a new account.

2. Click on the link to "create a grantee account."

3. Click on the link that indicates that it is your first time using eGrants.

4. Complete all of the required fields. Be sure that your contact information is correct. The password requirements are:

    a. Must contain at least 8 characters

    b. Must contain at least 1 number, but cannot begin with a number

    c. Cannot contain a word found in the dictionary

    d. Cannot contain special characters such as !@#$%^&*()_?><

    e. Cannot contain your username

5. Click on "next" to advance to the next screen.

6. Enter your EIN (Employer Identification Number) and click on "next" to advance to the next screen.

7. Select an option to either create a new profile or to select an existing organization.

8. Click on "next" to advance to the next screen.

9. Review your information and click on "next" to advance to the next screen.

10. Enter your phone number(s) and click on "next" to advance to the next screen.
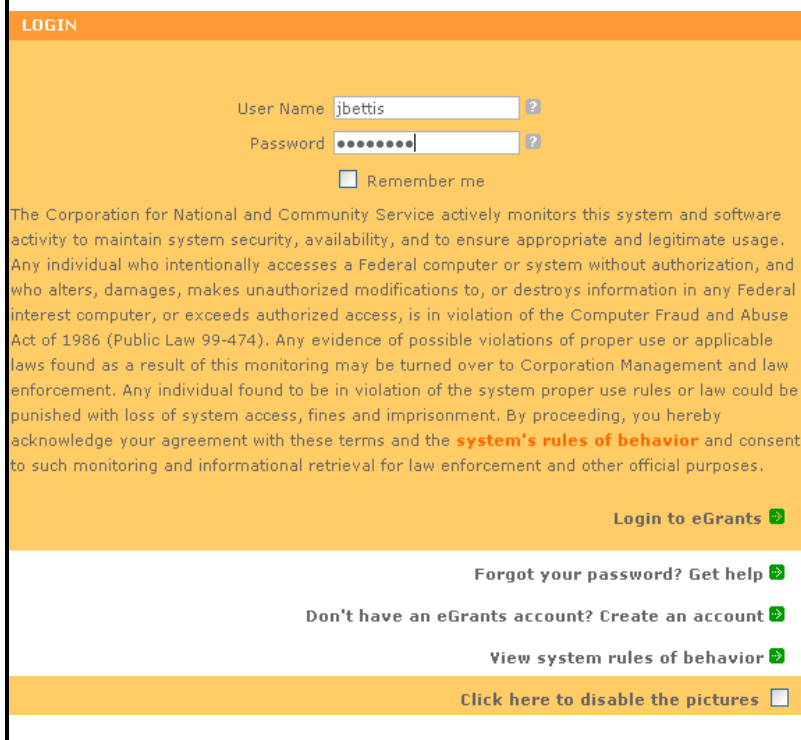
Conduct a final review of your information:

11. Click on "change" to select a different organization or to create a new one.

12. Click on "edit" to change your login credentials.

13. Click on "edit" to change your daytime phone.

14. Click on "submit" if your information is correct.

15. View confirmation, as well as helpful numbers and contact information for further assistance. The Grantee Administrator will receive email alerts when new users can be assigned the appropriate roles in eGrants.

16. Proceed to login.

17. If a new user has not been assigned a role by the Grantee Administrator, the user will be directed to this screen upon logging in.

4. Basic Navigation

4.1   Accessing the My AmeriCorps Portal Functions

4.1.1 eGrants Interface

Sponsors access the My AmeriCorps Portal functions through the eGrants interface at https://egrants.cns.gov/ using their eGrants login/password. If you do not have an eGrants account and will need to access the Portal functions within eGrants, you'll need to contact your Grantee Administrator to be granted access or use the login page to create an eGrants account.

If you forget your password, the eGrants Help Desk can send you information for resetting the password to the email address you provided when you created your account. After resetting your password you will be able to log back into eGrants. If you attempt to log into the system three times in a single session without providing the correct password, your account will be locked and you must contact the eGrants Help Desk to have it reset.

4.1.2 User Roles

Existing eGrants users who need to use the recruitment and/or member management features of the My AmeriCorps Portal will need to get new roles assigned to them by their Grantee Administrator.

New users will need to first have their eGrants account set up with specific roles to use the Portal features within eGrants.

You will need **one or both** of the following roles to use the various portal features within eGrants. The activities you can complete with each role are listed below:

Grantee with Recruitment:

- Create and update service opportunity descriptions

- Search for applicants, by individuals, skill sets, language, education level and availability

- Access applicants' contact information, profile, and personal information

- View applications

- Reach out to applicants to alert them to service opportunities

- Review references submitted with applications

- Select or reject applicants

Grantee with Member Management:

- View and approve V-81 (Use of Vehicles) forms, as needed

- View and sign Future Plans forms

- Search for, view and enroll members/supervisors in CNCS events

- Review and submit biweekly Sponsor Verification reports

5. Using the My AmeriCorps Portal: Access and Navigation

4.2   My Home Page

After you log into eGrants, you can access the Portal from links listed under the "View My AmeriCorps Portal" box.

Once you click this link, you can access all areas of the Portal using the four top navigation tabs (or Workbaskets): Recruitment, V-81 Forms, Future Plans Forms, and Training. Since your primary portal responsibilities fall under the Recruitment category, this page will be your default Home Page view.
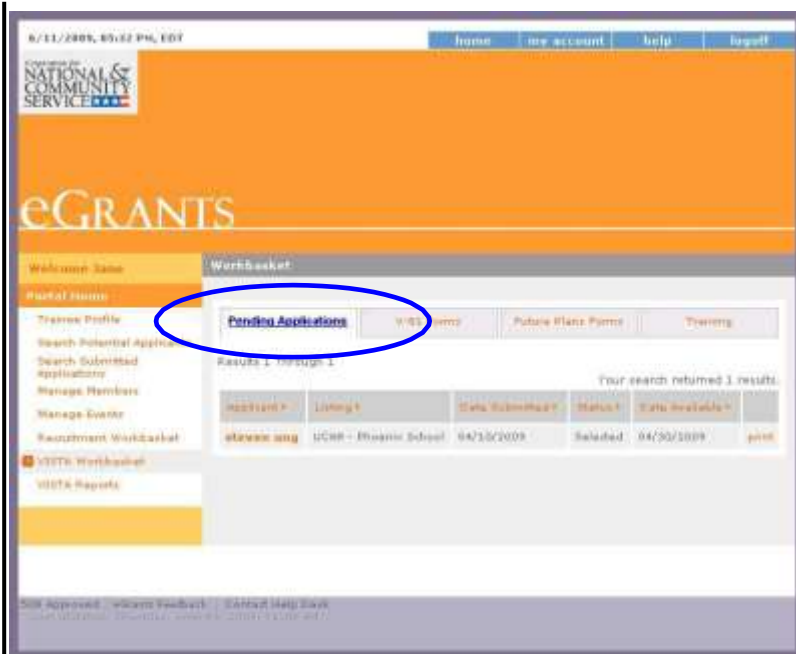
4.3   My Workbaskets

The Portal is designed to group pending tasks by type and display them in separate areas for ease of access. These areas are called Workbaskets and are specific to each user. This means a user can only view data and perform tasks in the Portal that they have access to.
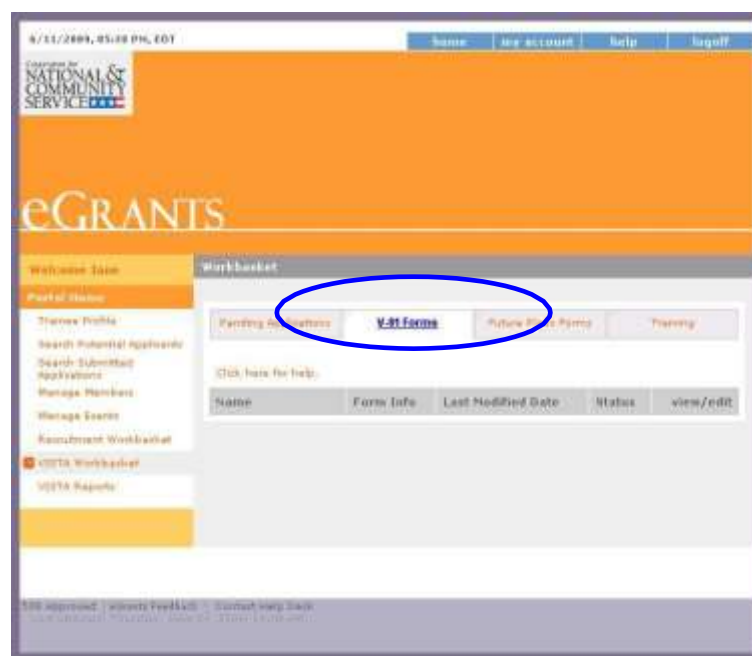
4.3.1 Recruitment/Pending Applications

The Recruitment Workbasket is your Home Page. This Workbasket will display all pending application submissions for your project(s). Also, you may use the Recruitment links in the left navigation on this tab to create and edit service opportunities, search for potential applicants, and search for application submissions.
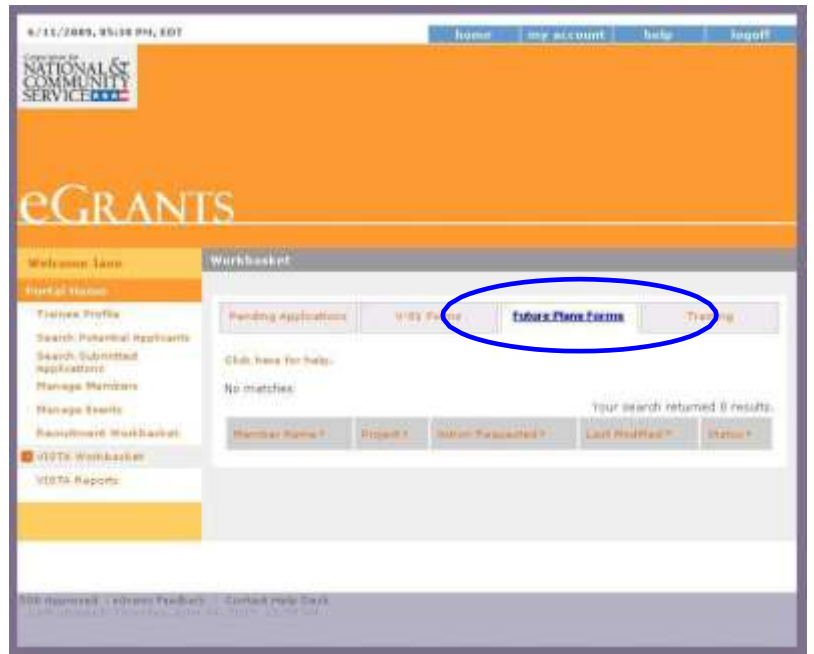

4.3.2 V-81 Transportation Forms

This tab will display V-81 transportation forms submitted by members serving on your project(s) that are pending your approval. Please note that this form is only collected for members engaged in a transportation accident during service related travel.
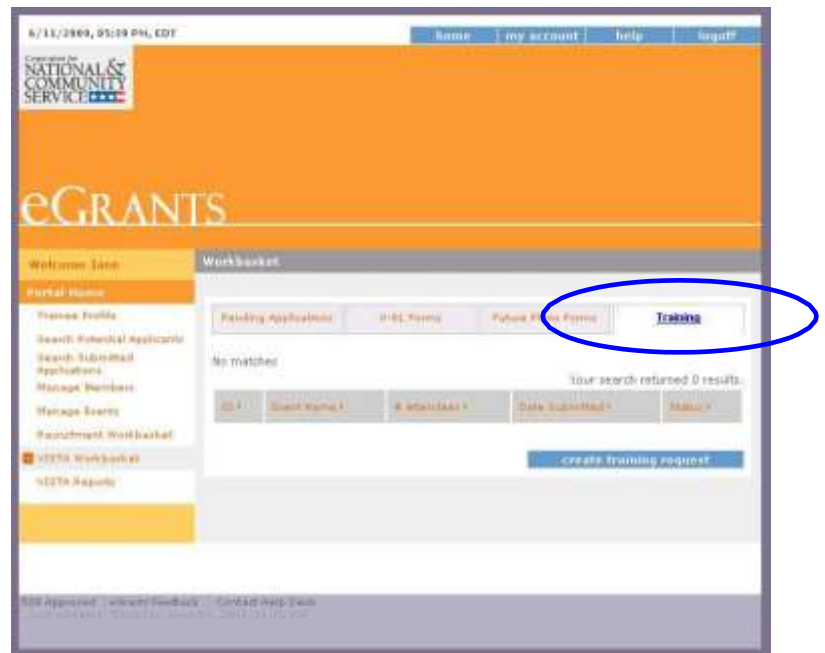
4.3.3 Future Plans Forms

This tab will display all Future Plans Forms submitted by members serving on your project(s) who are reaching the end of their service term.

4.3.4 Training

This tab will display AmeriCorps events in which you have enrolled members and/or supervisors.

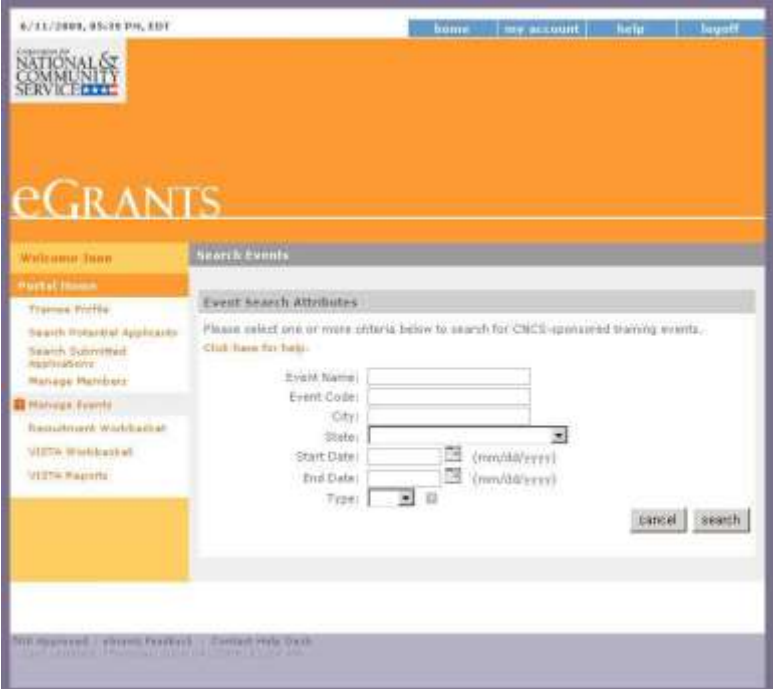# 1. CNCS Events

6.1 Overview

As a VISTA sponsor, you will be able to search for, view and enroll your members and/or supervisors in AmeriCorps training events created in the Portal.

6.2 Search Events

In order to view and enroll members in an event, you will first need to use the Search Events tool. You can use this functionality to browse through events or find a specific event that you want to create an enrollment for. You may narrow your search by any of the following criteria: Event Name, Event Code, City, State, Start Date, End Date, Event Type, or Related Project.
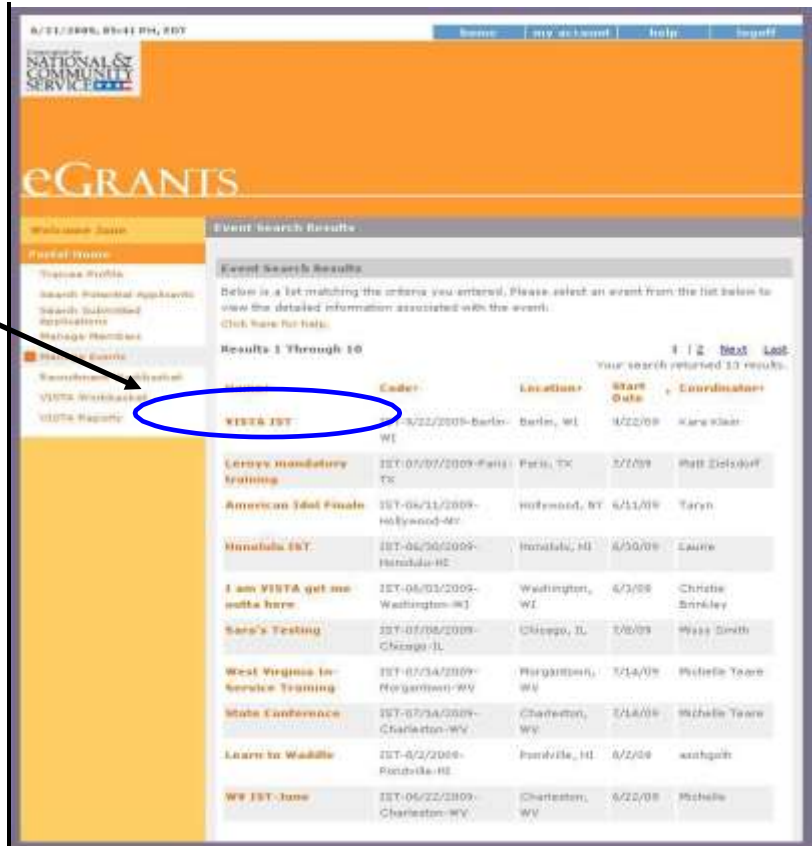
Process

6.2.1 Click on "Manage Events" in the left navigation menu.

6.2.2 Enter one or more search criteria to filter your event results.

6.2.3 Click on "search."

6.2.4 To navigate between search result pages (if more than 10 results are generated), use the upper-right navigation.

6.2.5 To view an event in the Search Results, click the "Event Name."

6.2.6 To modify or narrow your search criteria, click on "search again."

6.3 View Event

All information entered by AmeriCorps staff pertaining to the event will be displayed on the View Event page, including basic event information (e.g., Name, Code, Location, Dates), as well as Event Logistics, Travel Information, Event Financials, and additional Comments and Instructions. This will also create an enrollment from this page.

Process

6.3.1 Continue from Step 5 in Section 6.2 Search Events (click the **Event Name**).

6.3.2 Review AmeriCorps event information entered.

6.3.3 Click on "back" to return to search results.

6.3.4 Click on "enroll" to enroll VISTA members and/or supervisors serving on your project(s) in the event. Continue to Section 8.4: Enroll in Event.

6.4 Enroll in Event

You may enroll any members or supervisors serving on a VISTA project team in an AmeriCorps event. You can create an enrollment based on project team or select members and/or supervisors on an individual basis.

Process

6.4.1 Continue from Step 4 Section 8.3: View Event (Click on "enroll").

6.4.2 Review basic information on the event.

6.4.3 Select those members and/or supervisors whom you wish to enroll in the event. You may enroll by project team or individually.

6.4.4 Click on "cancel" to return to the View Event page.

6.4.5 Click on "enroll" to submit the enrollment.

6.4.6 You will be directed to the Training tab, and the new enrollment will appear under "CNCS Events."

6.5　Edit or Cancel Event Enrollment

If you need to update or cancel an enrollment in an AmeriCorps event, you may do so from the CNCS Events section on the Training tab. You can only edit an enrollment in an event with a future Start Date.

Process

6.5.1　Continue from Step 6 in Section 8.4: Enroll in Event.

6.5.2　Click on the "Event Name" under CNCS Events.

6.5.3　Click on "enroll" to edit or cancel the current enrollment.

6.5.4 Modify selection of enrolled members and/or supervisors as necessary. To cancel enrollment, deselect all project teams, members and/or supervisors.

6.5.5 Click on "enroll" to save and submit changes to the enrollment. You will be redirected to the Training tab.

7 Sponsor Verification Report

7.1 Overview

In order to verify that VISTAs are enrolled and continuing to serve, VISTA sponsors are required to complete a "sponsor verification report" every two weeks. Sponsors will receive an email reminder asking them to visit the portal to complete the report.

7.2 Process

7.2.1 Log into eGrants

7.2.2 Navigate to the My AmeriCorps Portal home

7.2.3 Navigate to the VISTA Workbasket and click on the "Sponsor Verification" tab.

7.2.4 Click on the project number to pull up that pay period's verification roster.

7.2.5 Review the list of VISTAs. The drop-down menu defaults to "no action," which indicates the VISTA member is still serving**.**

7.2.6 If a VISTA has left the project since the last report, select the reason by using the drop-down menu.

7.2.7 When all VISTAs are accounted for, click on the Certify button.

7.2.8 A message indicating successful submission will appear and the current pay period's verification will appear in the list.

7.2.9 If a report is delinquent, it must be completed before a new report can be certified.

8   Close-of-Service Process

8.1   Overview and Workflow

The VISTA close-of-service process begins 90 days prior to the member's expected completion date. At that time, the member receives an e-mail notification that Close-of-Service forms are ready to be completed. While the member will typically complete these forms, the VMSU and Region Offic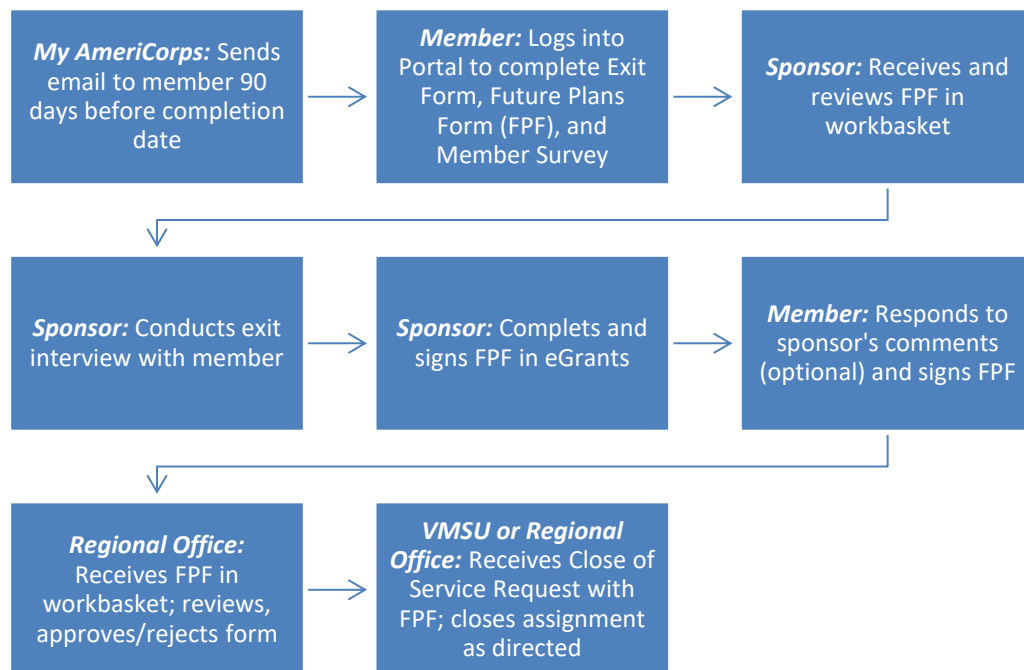e have the ability to complete them on behalf of a member as well. The VMSU or Region Office may select to make these forms available to a member earlier than this 90-day trigger date on a case-by-case basis.

Part A of the Future Plans Form, once completed by the member, is forwarded to you, the member's supervisor, for review and signature. After conducting the exit interview with the member, the supervisor completes Part B and electronically signs the form. It is then sent back to the member for review and signature. Once the member signs the form, it is sent to the AmeriCorps Regional Office for final approval.

Below is a summary workflow which highlights the sponsor's role in the close-of-service process.

| *My AmeriCorps:* Sends email to member 90 days before completion date | → | *Member:* Logs into Portal to complete Exit Form, Future Plans Form (FPF), and Member Survey | → | *Sponsor:* Receives and reviews FPF in workbasket |

| *Sponsor:* Conducts exit interview with member | → | *Sponsor:* Complets and signs FPF in eGrants | → | *Member:* Responds to sponsor's comments (optional) and signs FPF |

| *Regional Office:* Receives FPF in workbasket; reviews, approves/rejects form | → | *VMSU or Regional Office:* Receives Close of Service Request with FPF; closes assignment as directed |

8.2   Sign Future Plans Form

Once the member has completed Part A of the Future Plans Form, it will appear in your Future Plans Forms workbasket for review. Upon conducting the exit interview with the member, you, as the member's supervisor, complete and certify the form. It is then forwarded to the member to review your evaluation and recommendation and sign the form. The member will have the ability to respond to your evaluation in a comments box.

Process

8.2.1   From the **Future Plans Forms** tab, click on a member's name that has a status of "Pending Sponsor Signature." This will bring you to the Future Plans Form for that member.

8.2.2 Review Part A of Future Plans Form for information entered by the member.

8.2.3 Complete description of member's duties and accomplishments while serving with your organization.

8.2.4 Select a rating for the member for each quality listed to the left.

8.2.5 Select your recommendation for the member upon close-of-service. For exits, whether the member is terminating early or on time, select "Termination" as your recommendation.

8.2.6 Click "certify."

You will be directed to your Future Plans Form workbasket. The status of the form you certified should now be "Pending Member Signature."

Additional Resources

The following resources are also available:
- Creating a New eGrants User Account
- My AmeriCorps and eGrants User Roles
- My AmeriCorps/eGrants User Guide for Grantee Administrators

For additional assistance, you may contact the eGrants Help Desk at:

Phone: 888-942-2677
Web Form: questions.nationalservice.gov