eGrants User Account Set-up
**User Roles and Overview**

**eGrants -only User Roles:**

**Grantee without access to budget**
- Has limited application information; no budget access.
- Cannot assign user role.
- Can authorize, assure, and certify.

**Grantee with access to budget**
- Has access to entire application information, including budget information.
- Cannot assign user role.
- Can authorize, assure, and certify.

**eGrants and My AmeriCorps User Role:**

*Grantee Administrator*
- Has access to entire application, including budget information.
- Can assign user role and update organizational information.
- Can authorize, assure, and certify.
- Has access to Portal functions for all programs, operating sites, and/or service locations.
User Roles and Overview

My AmeriCorps-only User Roles (these roles do not have access to the eGrants screens, except when noted):

*Grantee Administrator
   This user role has both eGrants and My AmeriCorps functions. Please see previous slide for details.

Grantee Recruiter
   Has access to all recruitment functions.

State/National Member Management
   Applies to state and national grantees.
   Has access to all member management functions, including user role management, for assigned programs, operating sites, and/or service locations.
eGrants Login Page

https://egrants.cns.gov/espan/main/login.jsp
Create a Grantee Account

CREATE AN eGRANTS ACCOUNT

Please click on one of the following links to create an appropriate eGrants account.

Become a Peer Reviewer
Create a Grantee account

Already have an eGrants account? Proceed to Login

500 Approved | Report a Bug
Create a New Account

BECOME A GRANT APPLICANT

Please select one of the following options below.

- I have an eGrants account...
- This is my first time. I want to create a new account with eGrants...

Already have an eGrants account? Proceed to Login
Complete Required Fields

Welcome Guest
12/21/2006, 1:00 PM, EST

Create New Profile Menu
Login Information
- Enter EIN#
- Select an Organization
- Organization Information
- Grantee Phone Numbers
- Review and Submit

Become a Grant Applicant

Login Information
Please enter your login information. All questions marked with an asterisk (*) are required.

- First Name: Test
- Last Name: Account3
- Title: Project Director
- User Name: tacon106 (ex: rsmith, rsmith2004)
- New Password: ********
- Retype New Password: ********
- Password Question: Favorite color
- Password Answer: orange
- Email: taconacct@test.org
- Retype e-mail: taconacct@test.org

cancel | save | next
Enter EIN

Please enter your organization's EIN.

Enter your EIN #: 

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Select Your Organization

Welcome Test
12/21/2006, 1:03 PM, EST

Create New Profile Menu
- Login Information
- Enter EIN#
- Select an Organization
- Organization Information
- Grantee Phone Numbers
- Review and Submit

Become a Grant Applicant

Select an Organization
Your EIN# already exists in our record of organizations. Please make a selection below, and click next to proceed, or back to try another EIN.

List of Organizations with EIN# 000000002
- Create a new organizational profile for EIN# 000000002. OR select an existing org below
  - Chicagoland Community Center - Chicago, IL
**Organization Information**

### Become a Grant Applicant

#### Organization Information

Please review your selected organization's information. Click on the "next" button to proceed to the login information.

Please return to the "Select an Organization" page to select another organization. You can also start new by entering a new EIN# in the "Enter EIN#" page.

**Chicagoland Community Center: EIN# 000000002**

**Organization Type:** Non-Profit  
**Organizational Characteristics:** Service/Civic Organization  
**Organizational Characteristics:** Community Action Agency/Community Action Program

**Address:** 5555 Lake Drive, Chicago, IL 60640  
**Phone:** 773-000-0000  
**Fax:** 773-000-0000
Enter Your Contact Numbers

Grantee Phone Numbers
Please enter your phone/fax information below. All questions marked with an asterisk (*) are required.

* Daytime Phone: 321 321 3210 ext. 123
Evening Phone:  
Fax:  
Cell:  

508 Approved | Report a Bug
Please review and submit your information

Please review your information and click on the "edit" to make any changes.

**Organization**: Chicagoland Community Center
**EIN #**: 0001234567

**Organization Type**: Non-Profit
**Organizational Characteristics**: Service/Civic Organization

**Organizational Characteristics**: Community Action Agency/Community Action Program

**Username**: testacct07
**Password Question**: Favorite color
**Answer**: orange
**Email**: testacct@test.org
**Daytime Phone**: (321) 321-3210
Thank you

If you have created an account for an existing organization, the grantee administrator for your organization (listed below) has been notified about your account request. The grantee administrator must grant you access before you can login to eGrants.

For additional assistance, please contact your eGrants support provider or the eGrants help desk at 888-677-7849. For more information about your support provider go to http://www.cns.gov/egrants/to.html.

- Ann Kirkland
- Snoopy Beagle
- Sandra Bullock
Click on My Account to open the account information page.
Click on **Edit User Role/Permissions** to assign user role(s).
To add multiple roles, press and hold the “crtl” key on your keyboard and click with your mouse.

Highlight the appropriate user role(s) and click submit.
User Role assigned.
Click Portal Home.
Click on Manage Users.
Click on the orange links to sort in ascending or descending order.

Click on the user’s name to assign access.
Add Operating Site Level for a Sub-grantee User

User: Test Account3
A user can be assigned to administer at one (1) level only - Prime (Grant), Operating Site, or Service Location.

Available Primes

Assigned Primes

Available Operating Sites
- Campus Corps AmeriCorps State - Missoula, MT
- Community Engagement Research Fellow AmeriCorps State - Missoula, MT
- Community Fellows AmeriCorps State - Missoula, MT

Assigned Operating Sites

Available Service Locations
- Test - Washington, DC

Assigned Service Locations
Member Recruitment
Member Recruitment Workflow

**Grantee Recruiter**
create/edit Service Opportunity Listings

**CNCS Recruitment Administrator**
process and post listings

**Applicants**
search for listings, register, & apply to serve

**State/National Grantee**
view & accept applications, extend offer to serve

**Applicants**
accept offer to serve & complete Part 1 of the enrollment form
Service Opportunity Listings

• As of July 2, 2018, all grantees are required to post all service opportunities in the MyAmeriCorps Portal.

• Find instructions for completing listings on the AmeriCorps Knowledge Network:
  
  – [www.nationalservice.gov/resources/americorps/member-assignment-listings](http://www.nationalservice.gov/resources/americorps/member-assignment-listings)
Create a Service Opportunity Listing

Click Recruitment Workbasket on the left navigational panel.
Create a Service Opportunity Listing

Click on the Service Opportunities tab
### Create a Service Opportunity Listing

**eGrants**

**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
- S&N Workbasket
- S&N Reports
- VISTA Workbasket
- VISTA Reports

#### Recruitment Workbasket

**Pending Applications**

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>Type</th>
<th>Start Date</th>
<th>Location</th>
<th>Status</th>
<th>view/edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>568</td>
<td>City Year Rhode Island (Mid-Year)</td>
<td>SN</td>
<td>01/03/2008</td>
<td>Providence</td>
<td>Denied</td>
<td></td>
</tr>
<tr>
<td>2426</td>
<td>Hands On New Orleans</td>
<td>VISTA</td>
<td>11/12/2007</td>
<td>New Orleans</td>
<td>Approved</td>
<td></td>
</tr>
<tr>
<td>2430</td>
<td>GCCC MLK</td>
<td>VISTA</td>
<td>11/15/2007</td>
<td>Gulfport</td>
<td>Approved</td>
<td></td>
</tr>
<tr>
<td>458</td>
<td>Mid-Year positions (Jan. 08) - City Year San Jose</td>
<td>SN</td>
<td>01/15/2008</td>
<td>San Jose</td>
<td>Approved</td>
<td></td>
</tr>
<tr>
<td>489</td>
<td>City Year Boston - Volunteer Engagement</td>
<td>SN</td>
<td>08/30/2007</td>
<td>Boston</td>
<td>Approved</td>
<td></td>
</tr>
<tr>
<td>575</td>
<td>City Year San Antonio</td>
<td>SN</td>
<td>08/30/2007</td>
<td>San Antonio</td>
<td>Approved</td>
<td></td>
</tr>
<tr>
<td>2432</td>
<td>Hands On Gulf Coast Special Projects Coordinator</td>
<td>VISTA</td>
<td>11/12/2007</td>
<td>Biloxi</td>
<td>Approved</td>
<td></td>
</tr>
<tr>
<td>456</td>
<td>City Year San Jose/Silicon Valley</td>
<td>SN</td>
<td>09/04/2008</td>
<td>San Jose</td>
<td>Pending</td>
<td></td>
</tr>
<tr>
<td>400</td>
<td>City Year Boston - Literacy Tutoring</td>
<td>SN</td>
<td>09/30/2007</td>
<td>Boston</td>
<td>Approved</td>
<td></td>
</tr>
<tr>
<td>492</td>
<td>City Year Boston - Young Heroes</td>
<td>SN</td>
<td>08/30/2007</td>
<td>Boston</td>
<td>Approved</td>
<td></td>
</tr>
</tbody>
</table>
When you save a listing, it will open up a summary page for that particular listing.

Click Recruitment Workbasket to view the Service Opportunity Listings.
Creating a Service Location

Select and/or enter identifying information to start a search. Click on search to see the results.
The Program Information links provide quick access to perform other grant-related functions and are specific to the program listed.

Information about the Program and links to perform other tasks.
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.

<table>
<thead>
<tr>
<th>Operating Site Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Year: 2008</td>
</tr>
<tr>
<td>Operating Site Name: City Year Washington, DC</td>
</tr>
<tr>
<td>Operating Site Code: 96ACHDC0010003</td>
</tr>
<tr>
<td>Contact Name:</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Contact Address:</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Contact Email:</td>
</tr>
<tr>
<td>Contact Phone:</td>
</tr>
<tr>
<td>Budget Period:</td>
</tr>
<tr>
<td>Enrollment Period:</td>
</tr>
</tbody>
</table>
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.
The new service location is displayed. Click on the name to view or edit the details.
Click **S&N Workbasket** on the left navigational panel. Then click on the **Pending Applications** tab located on the top navigational panel.

Click on the applicant’s name to open the application.

Click **Print** to open up a static text of the application for printing.
Click on a tab to view the application details under that tab heading.

Click on **Print Application** to open up a static text of the application for printing. However, reference data will not appear under this view for printing.

Click **Return to Recruitment Workbasket** to return to the list of pending applications.
View Application - Julie Woodland

These are the references that were submitted with this application. If a reference has not been completed, you may send a request reminding the reference to complete the form by clicking the "send reminder" link. Alternatively, you may override the reference by clicking on the reference name and completing the override form once you have contacted the reference and received feedback from him or her.

<table>
<thead>
<tr>
<th>Name</th>
<th>Relation</th>
<th>Created</th>
<th>Modified</th>
<th>Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>James Rockwell</td>
<td>Not available</td>
<td>12/23/2008 10:37 PM</td>
<td>12/23/2008 10:37 PM</td>
<td>Yes</td>
</tr>
<tr>
<td>Mary Smith</td>
<td>Not available</td>
<td>12/23/2008 10:29 PM</td>
<td>12/23/2008 10:29 PM</td>
<td>No</td>
</tr>
</tbody>
</table>
Use the dropdown menu to choose the communication source (fax, mail, phone, other) you used to get the comments. Once you complete the Reference Override, click Save. When you click on the reference’s name, the contact information will show up on the Reference Override page.
When you click on the dropdown menu for a specific list, it will show a list of acceptable documents to choose from.
When you click Submit you will be asked to confirm your decision. Click OK to confirm or Cancel to cancel your recommendation. Once you have confirmed your decision, you won't have an opportunity to change it.
Invitation and Member Acceptance

- For prospective members who submitted an online AmeriCorps application, programs will review and select for service. This will cause the system to send an electronic invite link to the member.
- Programs send invitations to serve in AmeriCorps to prospective members who did not submit an online AmeriCorps application.
- Members accept their service assignment by clicking on a link in the invitation email that will complete the registration.
Enter applicant’s data and select the program, grant year, and service location from the drop-down lists.

Click on **add another** to send the current invitation and enter another.

Click on **save** to send one invitation and return to your home page.
What will applicants see?

- Text of invitation to serve message:

Dear Jim Stone:
Thank you for applying to serve on AmeriCorps City Year Baton Rouge program. Use the following link to complete your registration and enrollment: http://uatmy.americorps.gov/mp/member/validateInvitation.do?id=743033&pin=ciuuxxa31
Please do not reply to this message. If you have any questions or need further assistance, please submit a help request via https://edsncs--tst.custhelp.com/app/ask_mac or contact the help desk at 1-800-348-2677.

This is a unique link for each applicant.
• Applicant screen from invitation email:
### Member Enrollment Form

**Invitation Information**
- **First Name:** Jim
- **Middle Initial:**
- **Last Name:** Stone
- **Date of Birth:** 04/04/1944
- **E-Mail:** stone@cm.gov

**Enrollment Information**
- **Permanent Address Line 1:**
- **Permanent Address Line 2:**
- **Permanent City:**
- **State:**
- **Permanent Zip:**
- **Permanent Phone:**
- **Permanent Work Phone:**

**Mailing Address Line 1:**
- **Mailing Address Line 2:**
- **Mailing City:**
- **Mailing State:**
- **Mailing Zip:**
- **Mailing Phone:**
- **Mailing Work Phone:**

CHCS gathers information about sex, race, ethnicity, and other demographic information to ensure opportunities are provided to serve for people of all conditions. This information will be held confidentially and will only be used for data analysis to assist us in ensuring we serve all Americans equally. The information you provide will not be used in any way to determine or affect any federal benefits. Your response are required in order to be enrolled as an AmeriCorps member, but will be kept confidential.

**Sex:**
- [ ] Male
- [ ] Female

**Citizenship Status:**

* Citizenship of US includes persons born in Puerto Rico, Guam, the US Virgin Islands, and the Northern Mariana Islands. Nationals of the US include persons born in American Samoa, including Swains Island. U.S. citizens are U.S. citizens with: (a) Permanent Resident Card, INS Form I-551; (b) Alien Registration Receipt Card, INS Form I-551A; (c) a passport indicating that the INS has approved it as temporary evidence of lawful admission for permanent residence; or (d) an L4 indicating that the INS has approved it as temporary evidence of lawful admission for permanent residence.

**You are an asylee if:** You have a Form I-54 with asylum granted stamp; Form I-968 with Category "45", "46", or "47"; or an Order of the immigration judge granting asylum.

**What is the highest level of education you have completed?**
- [ ] Please Select

- [ ] High School
- [ ] Some College
- [ ] Associate Degree
- [ ] Bachelor’s Degree
- [ ] Master’s Degree
- [ ] Doctoral Degree

**What is your military, veteran, or family status?**
- [ ] Please Select

- [ ] I am a veteran
- [ ] I am an active duty member of the U.S. Armed Forces
- [ ] I am a member of the National Guard or Reserve Component
- [ ] I am an immediate family member of a veteran.
What will applicants see?

Member Enrollment Form
Important Considerations

• Programs must conduct screening of prospective members as part of the recruitment and selection process.

• The screening must include:
  – Citizenship eligibility
  – A national sex offender public website check prior to selecting the applicant
  – State/FBI checks
Member Enrollment Basic Rules—

• **Verify SSN validity and citizenship eligibility automatically or by hand in Portal when member accepts invitation**

• Before AmeriCorps member’s first day of service:
  – Complete NSOPW
  – Initiate State/FBI background checks
  – **Verify these steps are completed in Portal**

• Certify member enrollment **no later than 5th calendar day** from member’s start date
SSN and Citizenship Verification

- The Portal will submit the record to the Social Security Administration (SSA) as soon as the member completes and saves her section of the enrollment form.

- By the morning of the next business day, the record will indicate “Verified” or, if not verified, “Returned” in the Portal:
  - If verified by SSA, then the enrollment process will proceed to the next step.
  - If not verified by SSA, then the program will collect additional documentation and submit it to the CNCS hotline.

- If additional documentation is sufficient to verify eligibility, then CNCS staff will manually update the Portal record and the enrollment process will continue.

- If the additional documentation is not sufficient, the program will be notified, and the member cannot be enrolled.
• Programs should email the help desk to request a secure upload link, get a ticket number. Once the link is provide, programs will upload documents to verify.
• Programs should then call the helpdesk with ticket number to check on progress of manual verifications.
• This call should be placed the same day as the documentation being uploaded.
• Program should make the prospective member aware that due to the manual verification process, their start date may be delayed.
• Member start date cannot be prior to the verification date.
What Programs See: Pending Enrollment Workbasket

Programs will see a list of individuals who have accepted their invitations to serve.
This is a new section of the enrollment form; programs will see the SSN and citizenship verification status. In this example, both are pending. This means the member’s information is being verified by SSA.
CHC Verification

- Programs will complete SSN, criminal history, and citizenship verification of the enrollment form:
  - Certify NSOPW is complete
  - Certify State/FBI checks are initiated, per CNCS regulations
  - Press Save button in the Portal
What Programs See: CHC Verification

Programs will certify the NSOPW is complete and that State/FBI checks are initiated, per CNCS requirements.

Be sure to select Save after entering the requested information.
What Programs See: Start Date and Service Location

- At the bottom of the enrollment form:

  Programs complete the Placement Information section of the enrollment form by entering the member start date, service location, and slot type.

  Click enroll member when all steps are completed and verified.
What’s next?

The eGrants Help Desk
- 1-800-942-2677
- Technical Assistance
- User name/Password reset assistance
Resources

• CNCS contact during 2018 enrollment process transition period:
  – Jim Stone, Senior Program & Project Specialist, AmeriCorps State and National, jstone@cns.gov

• CNCS hotline:
  – 1-800-942-2677
  – https://questions.nationalservice.gov

• Instructions for creating member service opportunities:
  – www.nationalservice.gov/resources/americorps/member-assignment-listings

• 2018 member enrollment process memo and PPT:
  – www.nationalservice.gov/build-your-capacity/grants/managing-americorps-grantsMan grants page