eGrants and Blackbaud

Lizzie Winchester, Grants and Training Coordinator
Audrey Kidwell, Volunteer Generation Fund Manager
Oh the Places You’ll Go...
Member Management Powerpoint

- How to search for members
- How to edit member info
- How to create, approve or reject a Change of Term of Service request
- How to create, approve or reject a Suspension request
- How to create, approve or reject a Reinstatement request
- How to create, approve or reject a Transfer-out request
- How to create, approve or reject a Transfer-in request
- How to exit a member as scheduled
- How to exit a member early
Member Search

The fastest way to search for a specific member is by entering the Member ID number.
In order to be able to change a member’s term of service, the program must first have unfilled MSYs available that equal the MSY associated with the new slot type.

Click on Change Term to create a Change of Term Request. If the member has been suspended or exited, this link will not be available.
Create Change Term of Service Request

Select the member's new term of service

Select the appropriate Living Allowance option

Enter the effective date. If you click on the Calendar Icon, it will open up a calendar that you could use to select the date
Approve/Reject Change Term of Service Request

A Change Term of Service request can only be approved by authorized program staff within 90 days of the member’s start date. After this time, only a Grantee Administrator user can approve the request.

Click S&N Workbaskets on the left navigational panel. Then click the Status Change Requests tab located on the top navigational panel.

Click on the Member’s name to open the Change Term of Service Request.
Approve/Reject Change Term of Service Request

When the request is approved, the slots type will be updated.

If you click Reject it will not impact the member’s current status or available slots.

Click Cancel if you want to make a decision later.
Approve/Reject Change Term of Service Request

When the Change Term of Service Request is approved successfully, a confirmation message will appear on the member’s information page.
A member can be suspended at any time during the member’s term. The effective date of the suspension must be after the member’s start date and before the member’s required completion date. A member does not need to be suspended from the current term to serve in another (concurrent) term. A member serving concurrent terms cannot serve in simultaneous terms that exceed a full time term (1.0 MSY).

Click on **Suspend Member** to create a Member Suspension Request. If the member has been suspended or exited, this link will not be available.
Enter the effective date. If you click on the Calendar Icon, it will open up a calendar that you could use to select the date.

Click on Cancel if you don’t want to submit the Member Suspension Request.

Click on Create to submit the Member Suspension Request.
Approve/Reject Member Suspension Request

Click **edit pending update** to open the Member Suspension Request.
Approve/Reject Member Suspension Request

Click S&N Workbasket on the left navigational panel. Then click the Status Change Requests tab located on the top navigational panel.

Click on the Member's name to open the Member Suspension Request.
Approve/Reject Member Suspension Request

- Enter the effective date
- Click Cancel if you want to make a decision later
- Click on Reject if you don’t want to approve the Member Suspension Request
- Click on Approve to suspend the member from the term
A member can be reinstated at any time after the member has been suspended.

Click on Reinstatement Request to create a Member Reinstatement request. If the member has not been suspended or exited, this link will not be available.
Member Exit

Members who are approaching the end of their service (30 days prior to their expected completion date) will be listed in your Pending Exits workbasket. These members will have access to a link on their home page to complete their portion of the exit form which includes an option for them to complete their Member Satisfaction Survey.

<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>Julia Woodland</td>
<td>Serving Community</td>
<td></td>
<td>06/10/2009</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>06/15/2009</td>
<td>In Service</td>
<td>Not Started</td>
</tr>
<tr>
<td>Robert</td>
<td>Serving Community</td>
<td></td>
<td>06/15/2009</td>
<td>In Service</td>
<td>Not Started</td>
</tr>
<tr>
<td>Elizabeth</td>
<td>Serving Community</td>
<td></td>
<td>06/10/2009</td>
<td>In Service</td>
<td>Not Started</td>
</tr>
</tbody>
</table>

- Click on **Pending Exits**
- **Not Started** means the member’s portion of the Exit has not yet been completed.
- **Submitted** means the member has completed the section and is awaiting approval.
- If you want to complete the member’s portion of the exit, click on his/her name.
A confirmation message will appear indicating that the member’s portion of the Exit Form has been saved.

Click on Exit Member to open the Exit Form and exit the member.
When exiting a member early, the member’s exit form will not be listed in your Pending Exits workbasket, nor will the member have access to it from their home page. Therefore, you have to manually place the exit form in the Pending Exits Workbasket for members who need to be exited early. This will also allow the member to complete their portion of the exit form.

Click View next to the appropriate service term to open the term’s service page info.
Member Exit - Early

Once you unlock the exit form, you can wait for the member to complete member's portion of the Exit form or you can complete it on behalf of the member if the member has already completed and signed the paper exit form. Once the member's portion is completed, exit the member.

Click Unlock Exit Form. The member will appear in your Pending Exit Workbasket.
Program Management Powerpoint

- Access My AmeriCorps
- Search for Primes or Operating Sites
- View Operating Sites
- Allocate Slots
- Edit Operating Site Information
- Service Locations
- Member Roster
- Slot Management
- Transfer Slots
- Search for Service Locations
- What’s Next?
Slot Information
Member Listing

eGrants Coaching Unit

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
- Reassignment Workbasket
- SSH Workbasket
- SSH Reports
- VISTA Workbasket
- VISTA Reports

Program Information
- City Year Washington, DC - 2009
  00A9CHDC0010000
- Program Info
- Service Location Info
- Slot Info
- Slot Conversion
- Refill Slot Conversion
- Slot Transfer

View Operating Site

Operating Site Information

Program Year: 2009
Operating Site Name: City Year Washington, DC
Operating Site Code: 00A9CHDC0010000
Contact Name: 140 Q Street NE
Contact Address: 2nd Floor
Contact Address: Washington, DC 20002 - 2111
Contact Email: test@cityyear.org
Contact Phone: (202) 775-7759
Budget Period: 07/01/2009 - 06/30/2009
Enrollment Period: 07/01/2009 - 06/30/2009

Click on View Members to view the Member Roster.
Reporting Powerpoint

- Reporting: turning “data” into “information”
- Importance of inputting correct report criteria
- Report output options and benefits
- Review of Reports
  - Enrollment Approval Cycle Time
  - Exit Approval Cycle Time
  - Member Roster
  - Retention Rate
  - Slots Table
  - User Role
- What’s next?

- Enrollment Rate
- Member Download
- Member Roster by Count
- Service Location
- Table Audit
Reporting
What’s next?

- **The eGrants Help Desk**
  - 1-800-942-2677
  - Technical Assistance
  - User name/Password reset assistance
Link- https://www.GrantRequest.com/SID_215
### Requirements

Click the Applications tab to view saved and submitted Applications.

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Project Title</th>
<th>Type</th>
<th>ID</th>
<th>Due</th>
<th>Updated</th>
<th>My Role</th>
<th>Action</th>
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<td>AmeriCorps Test Program</td>
<td>AC- Exhibit III</td>
<td>26806</td>
<td>10/31/2018</td>
<td>9/27/2018</td>
<td>Owner</td>
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How to find your requirements

**VolunteerFlorida**

- Account: volunteerftest@gmail.com | Change E-mail/Password
- Last Log in: 9/11/2016 11:21 AM GMT-04:00

### Applications

#### Requirements

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Resubmission

volunteerflorida

Account: volunteerfltest@gmail.com  |  Change E-mail/Password
Last Log in: 9/11/2018 11:21 AM GMT-04:00

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Troubleshooting

- Log out and log back in
- Clear browsers history (cookies and cache)
- Switch browsers
- Take a screen shot and send to your program manager with as much detail as possible