



Serve Washington

Changing Communities. Changing Lives.

Planning Grants – Member/Site Systems (IV)

February 18 – 10:00AM

Please sign-in via the chat box:

- Organization/Program
- Name(s)
- What is your favorite (and maybe unique) pizza topping?

Announcement!

Formula RFGA (PY21-22)

Opens: Feb 24

TTA: Mar 3, 10-11:30am for New Apps

Due: Mar 31

Watch In-box and [Website](#) for Release



Announcement!

Civic Reflection Resource

<https://servewashington.wa.gov/programs/americorps/subgrantee-resources/civic-reflection-resources>



Announcement!

Regional Training Conference

Location: Virtual

Official Date: May 4-7, 2021

Registration Open

Watch for Discount Code



Learning To Date

Previous Content

- Quarter 1 Content
- Quarter 2 Content

Today's Agenda

- **Member/Site Systems**
 - **Member Files**
 - **Enrollment/Exit**
 - **Slot Management**
 - **Member Performance Reviews**

Next Up (*March 21*)

- Policies/Procedures and Volunteer Plan



Quarterly Questions

- *Are position descriptions free of prohibited activities and perception of “other duties?”*
- *Will the member service agreement be signed on or before the first day of service?*
- *Is the time tracking system paper or electronic? If electronic, does it meet CNCS requirements?*
- *Will members be allowed to teleservice? Does the teleservice policy meet CNCS requirements?*
- *Do staff/members have reoccurring access to vulnerable populations? Does the program have a criminal history check policy that meets CNCS requirements?*
- *Is volunteer engagement a primary program aspect for long-term sustainability or a secondary program aspect for additional reach/capacity? What activities will volunteers be engaged in?*
- ***How does this new knowledge change the budget/match in order to run a successful program?***



AmeriCorps Director Role

Are you the new “CEO” of your AmeriCorps program?

Executive Director

HR Manager

Case Manager

Grants Manager

Social Worker

Supervisor



Accountant

Compliance Officer

Communications Specialist

Contracts Specialist

Emergency Manager



AmeriCorps Member Files

Hard Copy or Electronic
Grant Record – Associated by Grant Year

- Application Docs
 - National App or Program App/Resume? References?
- W-4
 - (for member receiving living allowance)
- Government-Issued **Photo ID**
 - Passport, Driver's License, etc.
- Proof of Citizenship and Age
 - Passport, Birth Certificate, I-151, etc.
- **Adjudicated** Criminal History Checks
- **Signed** Member Service Agreement
- Position Description (if separate from MSA)
- Media Release (if separate from MSA)
- Health Insurance Enrollment/Waiver Form
- Performance Reviews
- **Signed** Timesheets
- Documentation for Exits
 - Cause?
 - Compelling Personal Circumstances?
- Parental Consent (< 17)



Enrollment/Exit

CNCS requires programs to enroll and exit members electronically in eGrants/My AmeriCorps.

- **Pre-Enrollment...BEFORE** member start date/hours.
- **Enrollment...within 7 CALENDAR DAYS** of start date/hours.
- **Exit...within 30 CALENDAR DAYS** of last day of service.



Enrollment

CNCS requires programs to pre-enroll, and enroll members electronically in eGrants/My AmeriCorps.

- **Pre-Enrollment...BEFORE** member start date/hours.
- **Enrollment...within 7 CALENDAR DAYS** of start date/hours.

Well before this...programs should have completed “pre-work”...

- Recruitment
- Screening/Selection
- Determined Eligibility
- Completed and Adjudicated Criminal History Checks
- Began Collection and Documentation of Member File



eGrants Pre-Enrollment

When program/member “pre-work” has been done, programs/members can begin electronic “pre-enrollment” ...

BEFORE START OF SERVICE/HOURS

- 1) Program Invites/Selects Member in eGrants
- 2) Member Accepts and Fills Out Member Sections
- 3) Automatic/Manual Verification of Eligibility Occurs
- 4) Program Certifies Criminal History Check Verification
- 5) Program Completes Program Sections

...once these steps are completed, the “enrollment” button will be activated...



eGrants Enrollment

When program/member “pre-enrollment” has been done, programs can finalize electronic “enrollment”...

Within 7 CALENDAR DAYS of START OF SERVICE/HOURS

1) Program clicks final enrollment button

...the step of changing the status from pre-enrolled to enrolled cannot be completed until the first day of service and no later than 7 days after the first day of service...system will not backdate beyond 7 days.

CAUTION! Disallowances (expensive costs and other) may occur if programs are found to be non-compliant with enrollment.



eGrants System of Record

- **CNCS *AmeriCorps* Terms and Conditions**
 - Start Date in eGrants is Effective Date (system of record)
 - eGrants start date
 - MSA start date
 - Hours start date
 - MUST ALL MATCH
 - And...
 - IF DATES DON'T MATCH
 - eGrants is the official date
 - Amend MSA to match eGrants
 - Disallow Hours prior to eGrants date



Pre-Enroll/Enroll Pitfalls

- **What are some common mistakes (human error) with enrollment?**
 - Poking applicants to complete their portion
 - Programs forgetting to check both NSOPW and Criminal History check boxes
 - Watching auto verification of eligibility (and submitting to CNCS when returned for manual verification)
 - Watching for “enrollment button” to be active
 - Allowing members to start/collect hours before pre-enrollment is complete
 - Forgetting to complete final enrollment button once members start (will not back date more than 7 days)



Enrollment Training Resources

- [Member Enrollment Flow Chart](#)
- [Member Enrollment Presentation](#) (PDF)
- [Member Enrollment Webinar](#) (Recorded)



Exit

CNCS requires programs to exit members electronically in eGrants/My AmeriCorps.

- **Exit...within 30 CALENDAR DAYS** of last day of service.

Well before this...programs should have completed “pre-work” ...

- Corrective Action Paperwork (if applicable)
- Documentation of Compelling Personal Circumstances (if applicable)
- Performance Reviews
- Final Timesheets
- Program Exit Paperwork



eGrants Exit

When program/member “pre-work” has been done, programs can finalize electronic “exit” ...

Within 30 CALENDAR DAYS of LAST DAY OF SERVICE

- 1) Program Unlocks Exit Form (if needed)
- 2) Member Fills Out Member Sections
- 3) Program Completes Program Sections

...the quicker a program exits a member, the quicker the member gets their education award.



Types of Early Exits

Only TWO types of early exits:

1) Release for Compelling Personal Circumstances

2) Release for Cause

- “cause” isn’t always negative, it encompasses anything that doesn’t fall under compelling



Types of Early Exits

Release for Compelling Personal Circumstances

- Performed satisfactorily
- Completed at least **15%** of term of service
- Meets the criteria in [45 CFR 2522.230](#)
 - Beyond participants control
 - Disability or serious injury
 - Disability, serious injury, or death of family member
 - Natural disaster
 - Strike, site closure
 - Relocations of spouse/family
 - Military obligations



Types of Early Exits

Release for Compelling Personal Circumstances

- Member receives pro-rated education award
- Program receives positive retention rate for member position
- Program may NOT refill positions exited with award

- Program may NOT release for CPC for:
 - Employment
 - School
 - General Dissatisfaction
- In rare cases, if the program design includes employment as the outcome, such as welfare to work, this may warrant CPC.



Types of Early Exits

Document Compelling Personal Circumstances

...the program must document the basis for any determination that compelling personal circumstances prevent a participant from completing a term of service...

At minimum:

- Member request (email, letter, etc.)
- Program support/corroborate (letter, note to file, etc.)
- Source documents (such as medical, military obligation, etc.)

CAUTION! Protect/Secure any personal records.



Types of Early Exits

Release for Cause

- Essentially any reason other than CPC
- Members are not eligible for pro-rated education award
- Member may still be given credit for satisfactory service (which allows the member to serve again)
- Program retention declines
- Program may refill member position in some cases



Types of Early Exits

In general when new to program management, it is best to contact your Serve WA Program Officer to discuss early exits.

CNCS also outlines its policy on release in the [CNCS Terms and Conditions for AmeriCorps State and National Grants](#).



Slot Management

Slot Refills

- Must fill unfilled eGrants slots first
- Can only refill slots for members exited for cause
- Members must have been released prior to completing **30%**
- Must have adequate time to complete (set new member up for success)
- May not refill the same slot more than once

Slot Conversions

- Unfilled and refill slots may be converted
- Conversions must be “Trust neutral”
- Conversions are not to be used in place of early exits



Slot Management

In general when new to program management, it is best to contact your Serve WA Program Officer to discuss slot refills and slot conversions.

CNCS also outlines its policy on conversions in the [CNCS Terms and Conditions for AmeriCorps State and National Grants](#).



eGrants Tutorials

Learn all aspects of eGrants here:

<https://www.nationalservice.gov/resources/amicorps/myamicorps-support-amicorps-state-commissions-and-sub-grantees-egrants-0>

CAUTION!

Couple outdated components:

- Hard copy enrollment/exit forms are no longer allowed. Everything must be done electronically.
- Programs are no longer allowed to complete the member portions of enrollment/exit. Please be sure members are completing their own information.
- Enrollment is required within 7 days, not 30 days.



Member Performance Reviews

Full-Time Members

- Mid-Term Review
- End-of-Term Review

Part-Time Members

- End-of-Term Review

Minimum Requirements

- Completed required number of hours?
- Satisfactorily completed assignments?
- Met program performance criteria?



Questions?



“Homework”

- *Continue any unfinished objectives from Quarter 1 and 2.*
- *Continue any unfinished objectives; such as, Member/Site Position Descriptions, Member/Site Agreements, and Time Tracking Systems.*
- *Continue budget adjustments as necessary.*
- **Develop checklist for Member Files.**
- **Develop Member Performance Review Process.**
- ***If applying for RFGA, participate in TTA webinar and complete application. TTA webinar encouraged even if not applying.**
- ***Prepare for National Service Regional Training Conference**



Deliverables

- Member Position Description
- Member Service Agreement (Host Site Agreement, if applicable)
- Timesheets/Time Tracking Tools (if electronic, description of system)

Submit to Program Officer anytime through April 30 (end of quarter) for general feedback.

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Highly Suggested Deliverable

- NSCHC Policy/Procedure
- Set Up and Test Truescreen Account
- Set Up and Test Fieldprint Account

Refer back to November Webinar (slides 22-31 specifically) and use the CNCS NSCHC knowledge network on [general guidance](#) and [Truescreen/Fieldprint manual](#). Work with Program Officer anytime for feedback.

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Closing

Questions?

