**Pre-Enrollment/Enrollment Checklist for eGrants/MyAmeriCorps**

**Before you can enroll any candidates, the program must first:**

* Activate service opportunity listing(s)
* Set up service locations

**Once you’ve identified a candidate you want to enroll in AmeriCorps:** (they’ve applied, you’ve interviewed, etc.) you’ll complete steps for pre-enrollment and for enrollment in the AmeriCorps grants management system eGrants/MyAmeriCorps

A major part of pre-enrollment involves the completion of three system-based verifications:

Social Security Number

Citizenship/Eligibility Status

Completion and Adjudication of the NSCHC (National Service Criminal History Checks)

These verifications may be completed in any order, but the candidate *cannot be enrolled until all three have been completed in eGrants/MyAmeriCorps*

**In Preparation**

* Send your online invitations/selections through eGrants/MyAmeriCorps as early as you can.
* Notify candidates of the member portion of the process, give them a deadline to complete the member sections, and follow up with them to make sure they do. The deadline will depend on how soon the candidate needs to be enrolled. Serve Washington recommends no longer than two weeks.
* The candidate will be required to enter their full address, *including ZIP+4 code.* Not entering the +4 can delay the process; make sure they’re prepared.
* Let all of your candidates know that there are certain instances that can delay the SSN or Citizenship/Eligibility verification process, such as spelling of names not matching between various documents, names being different between documents, and/or recent name changes. If your candidate feels any of these may apply to them, they should gather supporting documents in advance to help expedite the verification process. Proceed with the normal process, then if manual verification is required, the candidate will already have supporting documents when asked.
* If your candidate is currently serving with another AmeriCorps program, they must be exited before you can complete Enrollment Steps. In this case, you may want to contact the other program to determine when they will complete the member exit, ask them to expedite, while beginning as much of the Pre-Enrollment Steps as possible.
* Has the candidate already earned, or will this term of service result in earning more than, the equivalent of two full-time education awards? If so, the candidate will need to complete an acknowledgement form before the enrollment can be completed. You won’t get this notification until the moment you click on “enroll” near the end of the process – if you’ve waited until the last moment, you may not be able to complete the enrollment in time.

***If any error is made, there is little chance of the start date being corrected in eGrants. Any hours served before the start date in eGrants will be disallowed per AmeriCorps guidance.***

**Guide for Checklist**

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| Step # | ✓ when done | Who completes this? Program, Candidate, and/or AmeriCorps the Agency | Description of Step |

**Pre-Enrollment Steps**

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| **Candidate Invitation/Selection** | | | |
| **Step #** | **✓ when done** | **Who completes this? Program, Candidate, and/or AmeriCorps the Agency** | **Description of Step** |
| Step 1 |  | Program | Invite/Select the candidate via the eGrants/MyAmeriCorps portal.  It is critical that this information is entered correctly and that the name entered matches the full name listed on the candidate’s government-issued ID.  If the candidate is serving with another program be sure to review the preparation note above. |
| Step 2 |  | Candidate | Candidate accepts the invitation and completes their portion of the enrollment form, including SSN and Citizenship/Eligibility information.  Please stress to candidates that the information they enter must be accurate and timely. |
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| **SSN and Citizenship/Eligibility Verification**  SSN and Citizenship/Eligibility steps may be done before, after, or concurrently with NSCHC steps. | | | |
| **Step #** | **✓ when done** | **Who completes this? Program, Candidate, and/or AmeriCorps the Agency** | **Description of Step** |
| Step 3 |  | AmeriCorps the Agency | Within three business days, the status will be “Verified” (you will not get a notification) or “Returned” (you will receive an email notification for manual verification.)  If Verified, the candidate’s SSN and Citizenship/Eligibility verifications will be completed in eGrants/ MyAmeriCorps with a date-stamp. Skip to step 12.  If returned, continue to step 4. |
| Step 4 |  | Program and Candidate | Gather required documents from candidate that are requested from AmeriCorps for the manual verification process (if not already retained in candidate file):  Citizenship/Eligibility verification: see [45 CFR 2522.200(c)](https://www.ecfr.gov/cgi-bin/text-idx?SID=c2a58e812498aa999c822a9bb39b66d2&mc=true&node=se45.5.2522_1200&rgn=div8)  SSN Verification: social security card  Possible: name change documentation (ex. marriage certificate, court order, etc.) |
| Step 5 |  | Program | Request secure link from National Service Hotline.   * Go to <https://questions.americorps.gov/app/ask> and selecting the “Ask a Question to Webform” tab. * Fill in required fields: Name, Address, Subject, Question * Indicate that you are a State and National program enrolling members and need a Secure File Link to submit SSN/citizenship/eligibility manual verification documentation. * If your program has multiple individual cases requiring SSN/citizenship/eligibility manual verification at the same time, send these cases under a single ticket. |
| Step 6 |  | Program | Always get a ticket number any time you interact with the hotline, whether via phone, email, or webform. |
| Step 7 |  | Program | Submit required documentation and save a copy in the candidate’s file. You must retain documentation used to verify SSN and citizenship/eligibility that was not automatically verified. |
| Step 8 |  | Program and AmeriCorps the Agency | If submitted documentation is sufficient to verify eligibility, AmeriCorps updates the record to “Manually Verified” within 3 business days and date-stamps this action.  No email notification is sent from AmeriCorps to confirm manual verification; program must monitor eGrants for status updates by viewing the individual candidate’s profile.  If “Manually Verified”, Skip to item 12. |
| Step 9 |  | Program and AmeriCorps the Agency | If additional documentation is not sufficient or is not legible, the status will be “Returned” and program will be notified via email.  Return to item 4. This will delay the manual verification process. |
| Step 10 |  | Program and AmeriCorps the Agency, possibly Serve WA | If the status is “Cannot be Verified”, individual has been proven not to be eligible with respect to SSN or citizenship/eligibility – **this individual cannot serve in AmeriCorps.** If a program believes this status is incorrect, they can work with Serve Washington to challenge this finding. This will likely be a lengthy process that still may result in AmeriCorps determining the inability to serve. **Do not allow the individual to start service.** |
| Step 11 |  | Program and Serve WA | If at any time during steps 4-10 you have questions, please contact your Serve Washington Program Officer. |

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| **National Service Criminal History Check (NSCHC) Verification**  NSCHC steps may be done before, after, or concurrently with SSN and Citizenship/Eligibility steps. | | | |
| **Step #** | **✓ when done** | **Who completes this? Program, Candidate, and/or AmeriCorps the Agency** | **Description of Step** |
| Step 12 |  | Program and Candidate | The NSOPW check must be **completed and adjudicated** *before (at minimum one day before)* candidate’s first day of service. No exceptions. |
| Step 13 |  | Program and Candidate | State check(s) – State of Service and State of Residence – must be **completed and adjudicated** *before (at minimum one day before)* candidate’s first day of service. No exceptions. |
| Step 14 |  | Program and Candidate | The FBI check, must be **completed and adjudicated** *before (at minimum one day before)* candidate’s first day of service. No exceptions. |
| Step 15 |  | Program | Before candidate’s first day of service, program must go to the candidate’s profile in eGrants and **literally enter the certification date** verifying the NSOPW, State(s), and FBI checks have been completed and adjudicated.  Make sure to click “Save Information” to submit.  It is not enough for the program to complete items 12-14 before the candidate’s first day of service. The program must also go into eGrants *before the candidate’s first day of service* to complete the verification. |
| **FYI** | | | The start date entered by the program cannot be earlier than when the three verifications have been completed in eGrants. It must be the same or later – you’ll enter the start date during the next steps.  The preceding steps must be completed *before* the candidate’s first day of service. |

**Enrollment Steps**

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| **Complete the online enrollment between the candidate’s first day and eighth day.**  *Don’t wait until Day 8!* | | | |
| **Step #** | **✓ when done** | **Who completes this? Program, Candidate, and/or AmeriCorps the Agency** | **Description of Step** |
| Step 16 |  | Program | Enter candidate placement info on enrollment form including:   * Start Date,\* * Slot Type,\* * Program Year, * Program Title (operating site name), * Service Location,   Once all information has been entered correctly, the “enroll candidate” button will become active.  \*All information on the form can be entered and saved ahead of time EXCEPT the start date and slot type, which cannot be saved prior to the date of enrollment. |
| **Education Award Acknowledgement** | | | |
| Step 17 |  | Candidate | If the candidate has already received the equivalent of two Full-Time education awards, or if this term of service would result in exceeding that amount, the candidate will receive an automated notification from AmeriCorps asking them to complete an online acknowledgement of partial/no education award. You will not be able to complete the enrollment until the candidate completes this acknowledgement. |
| Step 18 |  | Program | If the candidate acknowledgement was required, once the candidate completes, the program must go back in and complete the enrollment (again). |

**Troubleshooting**

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| Check the candidate’s SSN and citizenship/eligibility verification status   * Both statuses must be “Verified” or “Manually Verified”   + Verification dates must be on or before the entered start date |
| Check the NSCHC verification box   * A date must be entered * Certification date must be before the entered start date |
| Check the entered start date   * Must be no later than the current date * Must be no earlier than the SSN/citizenship/eligibility verification dates * Must be no earlier than the NSCHC certification date |
| **If all of the steps above are complete and you still cannot enroll the candidate:**   * Contact National Service Hotline * Get a ticket number *every time* you contact the Hotline, whether it’s via phone, email, or webform. * Notify your Serve Washington Program Officer. * The member may need to pause service, identify to your Serve Washington Program Officer if the member has accumulated any service hours. * It will be *much easier and faster* to correct the situation before the eight-day enrollment deadline has passed than to try amending the enrollment after the fact. AmeriCorps has not historically allowed system amendments. |

***If any error is made, there is little chance of the start date being corrected in eGrants. Any hours served before the start date in eGrants will be disallowed per AmeriCorps guidance; however, contact your Serve Washington Program Officer for guidance before taking action to disallow member hours.***