



AmeriCorps

ASN Group Enrollment Guidance: PowerPoint Slides with Notes

AmeriCorps State and National
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Slide 1: Group Enrollment

Group Enrollment

Group Enrollment is an option during the final phase of enrollment in eGrants.

Extra step for group enrollment during the invitation process:

Applicants must be associated with the correct Program Year and Program Title

The screenshot shows the 'Invite Member' form in the eGrants system. The form is titled 'Invite Member' and includes a navigation menu on the left with options like 'Search Potential Applicants', 'Manage Members', 'Invite Members', etc. The main form area contains several input fields: First Name (John), Middle Name/Initial, Last Name (Doe), Social Security Number, Verify Social Security Number, Date of Birth (1/1/2001), E-Mail Address (johndoe@email.com), Program Year (2018), Program Title (AmeriCorps*National - Atlanta, GA), and Service Location (Select). The Program Year and Program Title fields are highlighted with a red box. At the bottom of the form are buttons for 'cancel', 'add another', and 'save'. The footer of the slide contains the text '© 2020 AmeriCorps. Nov-22 | 1'.

Programs wishing to enroll a large number of applicants at one time can use the Group Enrollment option in eGrants. For a program to use the Group Enrollment feature, there are a couple of extra requirements that need to be fulfilled. Specifically, AmeriCorps applicants need to be associated with the correct Program Year and Program Title during the invitation process. (Program Title is another term for the operating site name or subgrantee program

name.) This slide shows where these two key fields are located on the applicant invitation screen in the My AmeriCorps Portal.

Slide 2: Special Requirement for Group Enrollment

Special Requirement for Group Enrollment

Continued...



Program Year must be selected correctly by the program on the applicant invitation

- Applicants who applied via My AmeriCorps will need have the program year entered manually on their individual Enrollment Form, and so cannot participate in group enrollment (i.e., they will not appear on the Group Enrollment tab)

Program Title (operating site/subgrantee program name) must be selected correctly by the program

- Applicants who applied to/were invited under a different operating site must have the Program Title changed manually on their individual Enrollment Form, and so cannot participate in group enrollment (i.e., they will not appear on the Group Enrollment tab)

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For individuals to be associated with the correct program year, the program staff responsible for sending applicant invitations in the Portal need to select the program year correctly on the invitation. If an applicant applied and are accepted directly in the My AmeriCorps Portal, their applications will not be associated with a program year; instead, the program year will need to be entered manually on the individual enrollment form later in the enrollment process. As a result, these applicants will not be able to participate in Group Enrollment (in other words, they won't show up on the Group Enrollment tab in the Portal) and they will need to be enrolled individually instead.

For applicants to be associated with the correct Program Title (i.e., operating site or subgrantee), program staff need to select the correct Program Title during the invitation process. If the wrong Program Title is selected on the applicant invitation, it will need to be changed manually on the individual's enrollment form later in the process. In this case, again, the affected applicant will not be able to participate in Group Enrollment and will need to be enrolled individually.

Slide 3: Group Enrollment Screen

Group Enrollment Screen

Same information needed as in the individual enrollment form with one key difference:

- On the group enrollment form, you may enter information for up to 20 individuals at a time and enroll them simultaneously.

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Here is what the group enrollment screen looks like. The placement of the fields on the screen is different, but program staff will still enter the same types of information, make the same certifications, and take the same actions. The key difference: while on the individual enrollment form you are entering information for only one applicant at a time, on the Group Enrollment screen you can enter information for up to 20 applicants at a time and enroll those individuals simultaneously.

Slide 4: Group vs. Individual Enrollment

Group vs. Individual Enrollment

	Group Enrollment	Individual Enrollment
Number of applicants enrolled at a time	Up to 20	Only 1
Program Year and Program Title	Pre-populated from member invitation	Selected manually on enrollment screen
Individuals who applied through My AmeriCorps	Cannot be used	Must be used
Individuals invited under different program year/ program title	Cannot be used	Must be used
SSN/Citizenship	Applicants will not appear on Group Enrollment tab until they have been verified	Verification status and dates visible on individual enrollment screen
NSCHC certification	Certified by entering date on or before which all required NSCHCs were completed and adjudicated (ages 18+)	Certified by entering date on or before which all required NSCHCs were completed and adjudicated (ages 18+)

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This table shows a summary of the differences between the group enrollment and individual enrollment processes. As I said on the previous slide, group enrollment allows programs to enroll up to 20 individuals at a time, while individual enrollment is limited to one applicant at a time. Also, as I mentioned earlier, in group enrollment the applicant’s program year and program title are set during the invitation process. As a result, individuals who applied and were accepted via My AmeriCorps cannot be enrolled via the group enrollment feature, because the My AmeriCorps application process does not link individuals to this specific

information. Similarly, individuals that were invited under a different program year or different program title cannot be enrolled via group enrollment. Instead, the program year and program title for these applicants will need to be selected or changed manually using the individual enrollment form.

In both group enrollment and individual enrollment, the applicant's SSN and citizenship status needs to be verified on or before the applicant's start date. Applicants will not show up on the group enrollment screen until this verification is complete. For individual enrollment, the verification status and dates are shown directly on the enrollment form. If you are using group enrollment and need to find out the date of SSN or citizenship verification for a particular individual, you can view it on the individual's enrollment form.

The rules for National Service Criminal History Checks are the same for both group enrollment and individual enrollment. For applicants ages 18 years or older, program staff must enter the date on or before which the three-part NSCHC was completed and adjudicated. Entering this date and is a legal certification that these actions have been completed and this certification is recorded in the My AmeriCorps Portal. The date of certification is not visible on the group enrollment screen but can be viewed on the applicant's individual enrollment form.

Slide 5: Group Enrollment – Step 1

The screenshot shows the 'Group Enrollment: Step 1' interface. On the left is a navigation menu with 'Group Enrollments' highlighted. The main content area has a 'Workbasket' header with tabs for 'Pending Applications', 'Pending Invitations', 'Pending Enrollments', 'Group Enrollments' (highlighted with a red box), 'Status Change Requests', and 'Pending Exits'. Below the tabs are search filters for 'Program Year', 'Program Code', 'Program Title', and 'Slot Type'. A search result table is shown with columns for 'Name*', 'NSCHC Certification', 'Select to Enroll', 'Service Location', and 'Start Date'. The table currently displays 'No matches' and 'Your search returned 0 results.' A 'Click here for help.' link is also present.

Step 1:
In the S&N Workbasket in the My AmeriCorps Portal, click on the **Group Enrollments** tab

The next set of slides will walk you step by step through the group enrollment process. First, you need to locate the Group Enrollments tab in the S&N Workbasket of the My AmeriCorps Portal. It is located to the right of the Pending Enrollments tab. When you first click on the tab there will be no applicants listed; the applicants will appear in the next step.

Slide 6: Group Enrollment – Step 2

Group Enrollment: Step 2

Step 2: Select the correct Program Title (operating site name or subgrantee program name)

- The Program Year whose enrollment period is currently open will populate automatically
- Applicants who are associated with this Program Year and Program Title, have completed their portion of the Enrollment Form, and whose SSN/citizenship has been verified will appear on the tab. (These individuals are also visible on the Pending Enrollments tab)

Name*	NSCHC Certification	Select to Enroll	Service Location	Start Date
Shannon	<input type="checkbox"/>	<input type="checkbox"/>	Select	<input type="text"/>
Annabelle	<input type="checkbox"/>	<input type="checkbox"/>	Select	<input type="text"/>
Samantha	<input type="checkbox"/>	<input type="checkbox"/>	Select	<input type="text"/>

The next step is to select the Program Title - meaning the operating site name or subgrantee program name - for the individuals you wish to enroll. There will be a brief pause after the Program Title is selected, then the Program Year will automatically populate on the tab. The Program Year that will appear is the one whose enrollment period is currently open for that particular subgrantee or site.

The applicants associated with that particular Program Title and Program Year will automatically appear in the list at the bottom of the tab. The list displays up to 20 individuals at a time. If there are more than 20 individuals associated with this Program Year and Program Title, you will be able to use the navigation tools on the right side of the screen to move to subsequent pages.

Remember that applicants will only appear on the Group Enrollment tab if (1) they have the correct Program Year and Program Title pre-populated from the invitation form; (2) they have completed their portion of the Enrollment Form; and (3) their SSN and citizenship are already verified. If there are individuals you wish to enroll who do not appear on this tab, you can find them on the Pending Enrollments tab and use the individual enrollment process instead. Applicants who appear on the Group Enrollment tab also appear on the Pending Enrollments tab.

Slide 7: Group Enrollment – Step 3

Group Enrollment: Step 3

Step 3: Select the Slot Type for the applicants you wish to enroll

- In subsequent steps, you will only enter information for applicants who will be enrolled in this type of slot
- If you have applicants that will need to be enrolled in other slot types, leave those blank for now. (You will repeat these steps to enroll those applicants.)

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Next, you need to select a slot type. In the group enrollment process, all individuals enrolled in a single action must have the same slot type. If you need to enroll other applicants with a different slot type, you will need to repeat the group enrollment steps with the second set of applicants.

In the example on this slide, I intend to enroll Shannon, Annabelle and Samantha as Minimum Time members.

Slide 8: Group Enrollment – Step 4

Group Enrollment: Step 4

Step 4: For the applicants you wish to enroll, enter the date when all required National Service Criminal History Checks were completed and adjudicated for each applicant. For applicants under age 18 as of the entered start date, leave the NSCHC Certification field blank.

IMPORTANT:

- All required criminal history checks must be completed and adjudicated *prior* to inputting a certification date
- The applicant start date must be *after* the date entered in the NSCHC Certification field

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The next step is to enter the date by which the criminal history checks were completed for Shannon, Annabelle and Samantha. Remember that by entering a date, you are providing a legal certification that you have completed and adjudicated the required NSOPW, State, and FBI checks on or before that date. Also remember that, just like on the individual enrollment form, you must enter a start date for the applicant that is AFTER the date in the NSCHC Certification section.

In the example on this slide, I am entering dates in the NSCHC Certification section for Shannon, Annabelle, and Samantha. The NSCHC certifications were completed on different dates for each applicant, so I will need to ensure I have proper documentation to reference when entering this date.

Slide 9: Group Enrollment – Step 5

Group Enrollment: Step 5

Step 5: For the applicants you wish to enroll, select the appropriate Service Location(s)

- Service Locations must be set up in the My AmeriCorps Portal prior to taking this step

Name	NSCHC Certification	Select to Enroll	Service Location	Start Date
Shannon	04/05/2021	<input type="checkbox"/>	VYCC	
Annabelle	03/28/2021	<input type="checkbox"/>	VYCC	
Samantha	02/24/2021	<input type="checkbox"/>	North Country Hospital	

Please click "save information" after entering the date on or before which all required checks were completed and adjudicated (required for individuals 18 years and older).

* I, [redacted] certify this form as of 04/07/2021

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Next, I need to select service locations. For the correct service locations to show up in the drop-down list for these applicants, the service locations need to have been set up previously in the My AmeriCorps Portal. Please see the complete Member Enrollment training for more information about this prior step.

Note that the service locations can be different for each individual in the group enrollment process. In this example, Shannon is being assigned to VYCC while Samantha is being assigned to North Country Hospital.

Slide 10: Group Enrollment – Step 6

Group Enrollment: Step 6

Step 6: For the individuals you wish to enroll, enter the correct Start Date

- Must be within member enrollment period
- Must be on or after the SSN/citizenship verification dates
- Must be after the date entered in the NSCHC Certification field

Per AmeriCorps policy, enrollment should be certified within 8 days of the member's start date

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Now it's time to enter start dates.

Remember, in order to enroll an applicant, the correct start date must:

- Must be within member enrollment period
- Must be on or after the SSN/citizenship verification dates
- Must be after the date entered in the NSCHC Certification field

Annabelle and Samantha will start on 4/5/21. For Shannon I have selected 4/1/21 as a start date. However, I just completed the criminal history check certifications on 4/5/21 which is after the selected start date, so I will violate the third bullet. In other words, a 4/1 start date is not actually going to be possible for Shannon. But let's leave it there for now and see what happens. Per AmeriCorps policy, member enrollments should be certified within 8 days of the member start date.

Slide 11: Group Enrollment – Step 7

Group Enrollment: Step 7

Step 7: For the individuals you wish to enroll, click the "Select to Enroll" box

- Only the individuals with this box checked will be enrolled when you click the "enroll" button at the bottom of the tab

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The next step will be to check the “Select to Enroll” boxes since these are the applicants, I want to enroll in minimum slots under this Program Title and Program Year. Only the applicants whose “Select to Enroll” boxes are checked will be affected when the “Enroll” button is clicked at the bottom of the tab.

Slide 12: Group Enrollment – Step 8

Group Enrollment: Step 8

Welcome Sharon Workbasket

Portal Home

Trainees Profile

Pending Applications Pending Invitations Pending Enrollments **Group Enrollments** Status Change Requests Pending Exits

Search Potential Applicants

Search Submitted Applications

Manage Members

Invite Members

SSN & Citizenship Status

Manage Events

Manage Programs

Manage Service Locations

Manage Users

Recruitment Workbasket

SSN Workbasket

SSN Reports

VISTA Workbasket

Sponsor Verification

VISTA Reports

Program Year: 2020

Program Code: [redacted]

Program Title: [redacted]

Slot Type: Minimum Time (300) [12] w/ Living Allowance

Click here for help.

Results 1 through 3 Your search returned 3 results.

Name*	NSCHC Certification	Select to Enroll	Service Location	Start Date
Shannon	04/05/2021	<input type="checkbox"/>	VYCC	04/01/2021
Annabel	03/28/2021	<input type="checkbox"/>	VYCC	04/05/2021
Samantha	02/24/2021	<input type="checkbox"/>	North Country Hospital	04/05/2021

Please click "save information" after entering the date on or before which all required checks were completed and adjudicated (required for individuals 18 years and older).

I, [redacted] certify this form as of 04/07/2021

save information enroll

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Step 8: At the bottom of the tab, certify the form

The form needs to be certified at the bottom of the tab. This legal certification confirms that all the information provided on the form is correct and complete, including the criminal history check certification dates.

Slide 13: Group Enrollment – Step 9

Group Enrollment: Step 9

Welcome Sharon Workbasket

Portal Home

Trainees Profile

Pending Applications Pending Invitations Pending Enrollments **Group Enrollments** Status Change Requests Pending Exits

Search Potential Applicants

Search Submitted Applications

Manage Members

Invite Members

SSN & Citizenship Status

Manage Events

Manage Programs

Manage Service Locations

Manage Users

Recruitment Workbasket

SSN Workbasket

SSN Reports

VISTA Workbasket

Sponsor Verification

VISTA Reports

Program Year: 2020

Program Code: [redacted]

Program Title: [redacted]

Slot Type: Minimum Time (300) [12] w/ Living Allowance

Click here for help.

Results 1 through 3 Your search returned 3 results.

Name*	NSCHC Certification	Select to Enroll	Service Location	Start Date
Shannon	04/05/2021	<input type="checkbox"/>	VYCC	04/01/2021
Annabel	03/28/2021	<input type="checkbox"/>	VYCC	04/05/2021
Samantha	02/24/2021	<input type="checkbox"/>	North Country Hospital	04/05/2021

Please click "save information" after entering the date on or before which all required checks were completed and adjudicated (required for individuals 18 years and older).

I, [redacted] certify this form as of 04/07/2021

save information **enroll**

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Step 9: At the bottom of the tab, take the “enroll” action. (If you are not ready to enroll the individuals yet, click the “save information” button instead)

- Up to 20 individuals can be enrolled at a time

The next step is click the “enroll” button at the bottom of the tab to attempt to enroll the applicants. The key word here is attempt - clicking this button is not a guarantee that all the enrollments will be successful. The next tab will show you what happens if one or more of the enrollments does not go through.

As a reminder: up to 20 individuals can be enrolled at one time using the group enrollment process. If you have filled out information on this tab for one or more applicant but aren't yet ready to take the "Enroll" action, click "Save information" instead.

Slide 14: Group Enrollment – Step 10

Group Enrollment: Step 10

Welcome Sharon

Workbasket

Pending Applications | Pending Invitations | Pending Enrollments | **Group Enrollments** | Status Change Requests | Pending Exits

The following members have not been enrolled with the following reasons:
Shannon Borucke's Start Date must be after the date entered in the NSCHC Certification field. Please correct the Start Date.

Program Year: 2020
Program Code: [REDACTED]
Program Title: [REDACTED]
Slot Type: Minimum Time (300) [12] w/ Living Allowance

Results 1 through 1

Name*	NSCHC Certification	Select to Enroll	Service Location	Start Date
Shannon Borucke	04/05/2021	<input type="checkbox"/>	VYCC	04/06/2021

Please click "save information" after entering the date on or before which all required checks were completed and adjudicated (required for individuals 18 years and older).

certify this form as of 04/08/2021

save information enroll

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Step 10: Check for error messages at the top of the tab. These messages will indicate if one or more of the individuals' enrollments was not successful.

- In this example, the start date entered for Shannon was prior to the date of the NSCHC Certification, so they could not be enrolled. Program staff will need to correct Shannon's start date and try again.

If one or more of your enrollment attempts was not successful, you will see a red error message at the top of the tab. The message will tell you which applicants were not enrolled, and why. Applicants that were successfully enrolled will disappear from the Group Enrollment tab, while applicants who were not successfully enrolled will continue to be visible.

In this example Annabelle and Samantha's enrollment was successful, so they are no longer displayed on this tab. However, as predicted, Shannon's enrollment was not successful because the start date entered for them was before the NSCHC certification. So, Shannon still appears on the Group Enrollment tab. Program staff will need to correct Shannon's start date, check the "Select to Enroll" box again, and try again to enroll them.

Slide 15: Troubleshooting Enrollment Error Messages

Troubleshooting Enrollment Error Messages

- ✓ Sufficient slots available
- ✓ SSN and citizenship verified on or before member start date
- ✓ NSCHC Certification date before member start date
- ✓ Service Location selected
- ✓ Member start date no later than today's date
- ✓ Applicant is eligible to serve
 - Has not previously served more than 4 terms
 - Has not declined a partial education award
 - Has not received an unsatisfactory performance rating from a previous term of service
 - Is not currently actively enrolled in the same program or in another term that when combined exceeds full-time service

The following members have not been enrolled with the following reasons:
Patricia [REDACTED] has already served four terms with State & National and may not serve again.
Diana Elastname does not have a Service Location Selected, you must assign a service location for this member before completing enrollment.
Pfirstname Flastname's Start Date may not be after the Current Date.
Delena [REDACTED] has declined the partial award, so they cannot be enrolled.
Viola Jlastname already has an active enrollment in this program for this year.

The details of the error message will provide specific guidance

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There are several reasons why member enrollments might not be successful; some of the possibilities are listed on this tab. It could be that the program doesn't have enough slots available to enroll all the selected applicants in that particular slot type.

It could be that the start date was entered wrong, or that the program staff forgot to select the applicant's service location. It could be that the applicant has not yet been exited from a current full-time service term. Or it could be that the applicant themselves was not eligible to serve: they may have previously served four terms with AmeriCorps State and National or received an unsatisfactory performance rating from a prior service term.

Whatever the reason, the error message will provide you with details about what went wrong and, if possible, what you can do to correct it. The member enrollment WILL NOT be complete until the error is corrected, and program staff successfully take the Enroll action again.