ASN Group Enrollment Guidance: PowerPoint Slides with Notes

AmeriCorps State and National
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Slide 1: Group Enrollment

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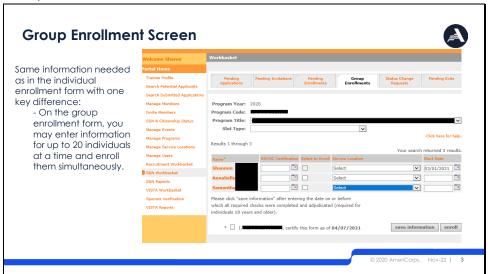- Applicants who applied to/were invited under a different operating site must have the Program Title changed manually on their individual Enrollment Form, and so cannot participate in group enrollment (i.e., they will not appear on the Group Enrollment tab)

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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

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

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 <u>on</u> or <u>before</u> 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 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)
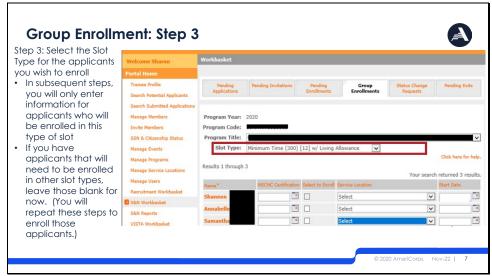
The next step is to select the Program Title - meaning the operating site name or subgrantee program name - for the individuals you wish to enroll. There will be a brief pause after the Program Title is selected, then the Program Year will automatically populate on the tab. The Program Year that will 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.
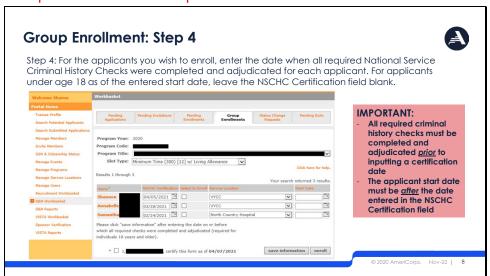
Slide 7: Group Enrollment – Step 3

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 Shannon, Annabelle and Samantha as Minimum Time members.

Slide 8: Group Enrollment – Step 4

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

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

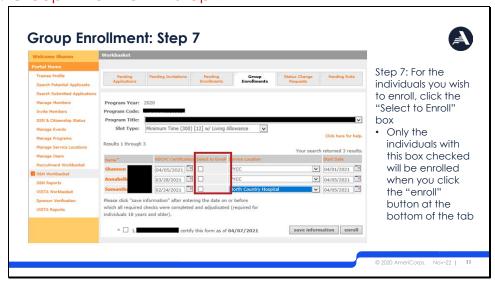Now it's time to enter start dates.

Remember, in order to enroll an applicant, the correct start date must:
- Must be within member enrollment period
- Must be <u>on or after</u> the SSN/citizenship verification dates
- Must be <u>after</u> 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

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

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

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 <u>attempt</u> – 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.

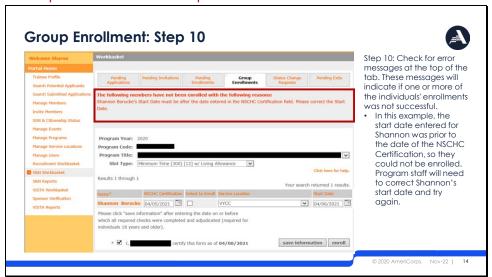As a reminder: up to 20 individuals can be enrolled at one time using the group enrollment process. If you have filled out information on this tab for one or more applicant but aren't yet ready to take the "Enroll" action, click "Save information" instead.

Slide 14: Group Enrollment – Step 10

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
  o Has not previously served more than 4 terms
  o Has not declined a partial education award
  o Has not received an unsatisfactory performance rating from a previous term of service
  o 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 ▮ 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 ▮; 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 themself 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.