

My AmeriCorps Tips and Tools

Meeting Notes

#1 Good Ideas

Create internal policies and procedures

Educate projects on consequence if they don't get prior approval to make slot changes

GA shared: great policies and procedures manual for slot conversions: need approval penalties re: costs, budget process

Work around – NOT RECOMMENDED

Built a member profile apart from application

Portal Tips and Suggestions

Do not try to go on all tutorials at once

Create an excel spreadsheet for member time tracking

Be more detailed in what position/role you are asking the helpdesk to assign

Add the ability for state commissions to have the access to assign/change user roles for programs

#2 Questions

What date should be entered during enrollment?

Clarify that the member contract is signed prior to serving?

Is a paper copy of member enrollment needed?

What is being done for time-tracking?

Do you still need corporation approval to transfer slots for competitive?

Training Tips

A.

Go through the system with them once so you can both see the same thing

Whenever programs are together we open up the portal and review it

Programs don't "get" the levels they should be at

Peer-to-peer helps

Send projects tutorials' links so they can call you and ask questions and answer questions for projects

I send them all the power-point presentations

B.

If member has started the enrollment in portal, project director can't change them

We're also doing services logs/timesheets since we know they will be needed in an audit

If member logs their time and certifies it, it's official. Doesn't have to be hard copy

We created an excel sheet that I send to projects, they send it back so I can see if members are on track

We tell the subs what they have to have; they decide how to do it

Dan's point regarding roles...

C.

The administrator role in that org can changed their access; commissions can't go in and set/reset subs access....rather than having to email Program Officer

Commission can transfer slots between competitives, not between formula and competitive. Money has to follow.

Program grantee administrative role: program can approve up to 90 days.

To make changes in portal and levels, you shouldn't have to contact Program Officer (unless grantee administrator at org level leaves).

D.

Good idea to have more than one grantee administrator (in case someone leaves, etc.)

Be patient....its new and a transition (such as when WBRS started)

What commission/national can do:

- see members
- exit members
- see programs
- pending exits

Use work baskets:

- table audit in 'reports' -> you can see what has been done/pending, includes who made changes/when
- Member download reports – can be by program

