



One Utah
Service Fellowship

Program Coordinator Guidebook

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About the Program

The One Utah Service Fellowship (OUSF) project aims to address Utah's critical needs while improving the preparation for and prospects of success in post-secondary education or training for young adults by providing meaningful service opportunities in Healthy Futures, Education, and Capacity Building. All Service Fellows will be enrolled AmeriCorps Members and will provide support to organizations in K-12 Education and Healthy Futures, two of the high need focus areas defined by AmeriCorps as most pressing to the nation. More specifically, through the service opportunities fellows will promote physical, mental, and behavioral health, engage in expanding services to under-served, under represented and rural populations, and support vulnerable families so children have better opportunities for success [Utah Home 1.4, 1.5, 1.7, 2.6]. Fellowship service may also be non-direct support to increase the efficiency and effectiveness of nonprofits and governmental agencies. At the end of this program year (2024-2025) the Fellows will be responsible for tutoring, mentoring, student teaching, college counseling, and providing after school and extended day programs to 8,000 students. Fellows will also be responsible for providing preventative health services for at least 20,000 low income, underinsured, and rural patients/recipients and building capacity at more than 150 non-profit organizations. In addition, the Fellows will leverage over 4,285 volunteers who will be engaged in activities supporting the AmeriCorps focus areas. As a direct result of the OUSF participating young adults who have graduated high school will provide support to over 200 community organizations through direct service, volunteer recruitment, and organization resource development thereby increasing these organizations' capacity and will infuse Utah's nonprofit and government sectors with over 12.1 million dollars' worth of economic impact based on calculations of the Do Good Institute. During their term of service, Fellows will earn a living allowance in accordance to the minimum term hours they complete and will also receive over \$1.83 Million in education awards upon successful completion. These education awards support students as they complete their educational goals at institutions of higher learning in Utah. While serving high needs OUSF partner organizations in the nonprofit and government sectors, the fellowship program utilizes a comprehensive approach toward civic engagement involving a combination of professional development, mentoring, and training to education, teaching, nursing, emergency medicine, dietetics, dental hygiene, and non-profit management.

Participation in the OUSF supports the development of a revitalized, community-oriented, well-educated workforce that works to meet community needs and build community capacity

One Utah Service Fellowship AmeriCorps Program is the largest in the State of Utah with about 900 members serving each year. A program this size requires several processes for getting things done. This guidebook describes the different tasks that you will complete to ensure the successful enrollment, term of service and exit of the many members serving through our program.

History

The Center for Community Engagement at USU coordinates the One Utah Service Fellowship Program on behalf of the Utah Commission on Service and Volunteerism. In 2024, legislation passed to support the One Utah Service Fellowship, which gives post-high school young adults and matriculated college students real world experience working in various areas of public service. Additionally, the bill allocates funds to provide the participants with stipends. These stipends allow the young adults to explore careers in public service, as opportunities in these sectors are typically unfunded.

In the early 1990s, institutions of higher education in Utah were loosely organized in the Serving Utah Network (SUN) that sought to strengthen community service and learning at each of the state's colleges and universities. Most institutions had some level of involvement in community service, but many staff and faculty desired to deepen this commitment and hoped to better integrate service into the curriculum.

On November 21, 1996, a coalition of all of Utah's college and university presidents formally created the Utah Campus Compact with a mission to foster in students the values and skills of citizenship through active involvement in academically-based and co curricular public and community service. The Board of Directors, consisting of all member campus presidents, approved the mission statement, and Utah became the 18th state to join the national Campus Compact network.

In 2004 an annual Utah State Legislative appropriation was approved, and in 2005 Utah became the first state compact to include all of its non-profit higher education institutions. In 2008, guided by a new strategic plan, UCC focused on two main goals: 1) to continue to advance community engagement in higher education across the state as it had done for the past ten years; and 2) undertake a statewide higher education initiative. They worked to embed engagement more deeply across each campus and bridge the opportunity gap by improving educational access and success.

In 2011, Utah Campus Compact added the Segal Education Award Program funded by AmeriCorps as it's keystone service opportunity. Since then the program grew to fund the

educations of more than 5,000 college and university students to the tune of 12.1 million dollars.

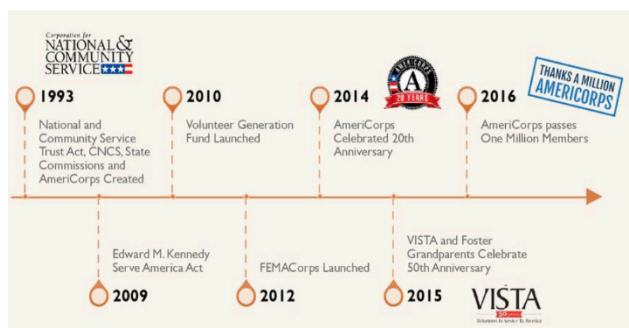
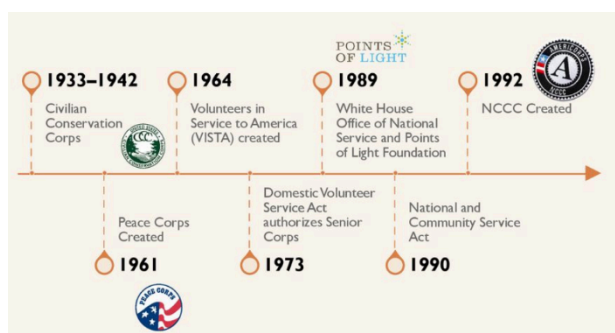
In 2018, as many of the presidents of the public universities in Utah were moving on to new career opportunities, they, as the board of directors for Utah decided to disband the compact, but insisted on maintaining the AmeriCorps Program. Out of that decision, program was transferred to the Center for Community Engagement at USU and continued to operate as the Utah Higher Education AmeriCorps Network.

AmeriCorps Quick Facts

AmeriCorps Mission: To improve lives, strengthen communities, and foster civic engagement through service and volunteering.

AmeriCorps is a network of national service programs, made up of three primary programs that each take a different approach to improving lives and fostering civic engagement. Members commit their time to address critical community needs like increasing academic achievement, mentoring youth, fighting poverty, sustaining national parks, preparing for disasters, and more.

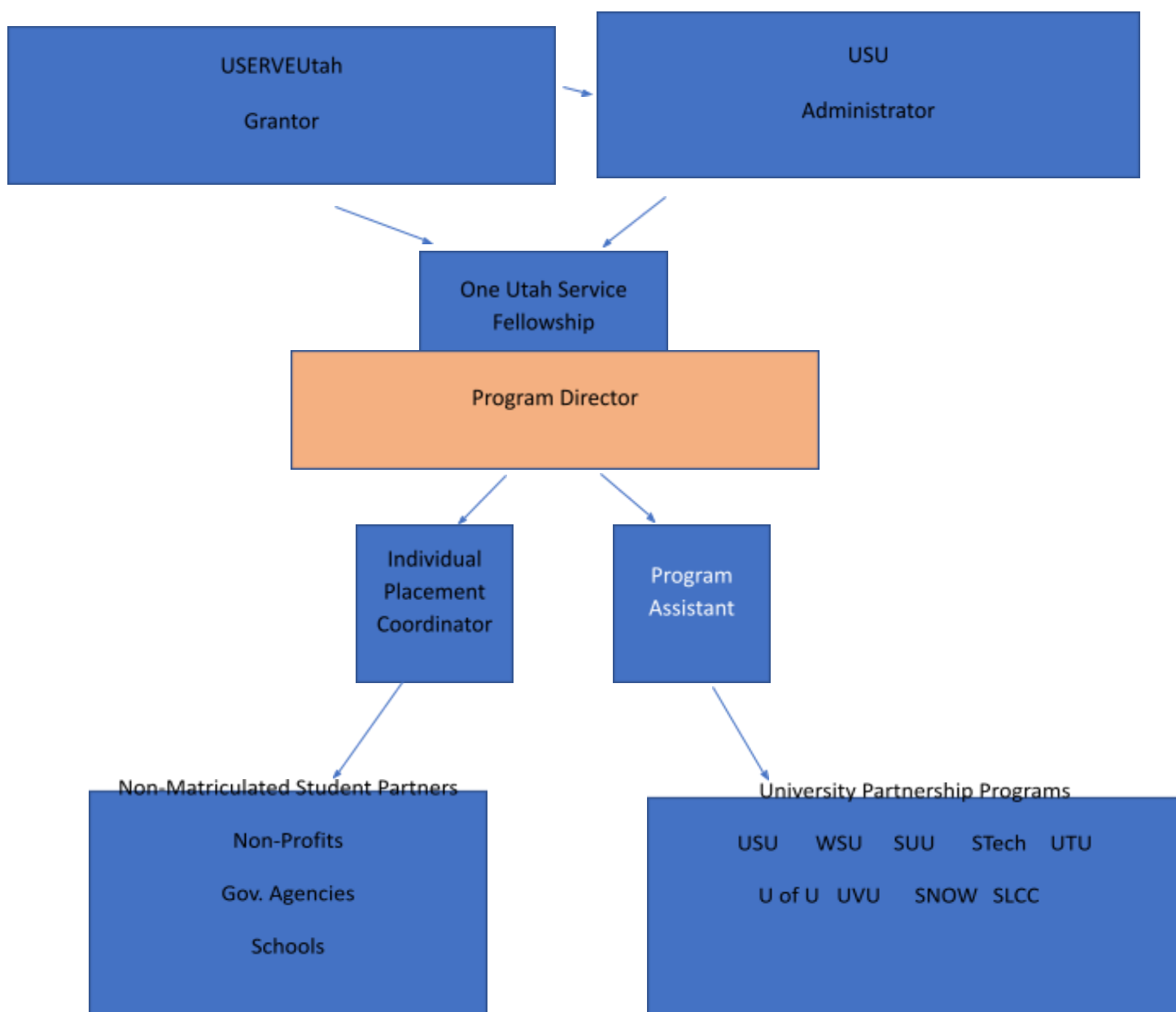
Similar to the Military or the Peace Corps, it is another form of service to communities across our country.



AmeriCorps in Utah

UServeUtah administers all Utah AmeriCorps State grants and provides administrative, fiscal and programmatic oversight, technical assistance and program development in accordance with the guidelines set forth by the Corporation for National and Community Service (CNCS). The One Utah Service Fellowship is one of 14 AmeriCorps Programs in the state.

Organization Outline



Sean Damitz – Executive Director of Center for Community Engagement

Janell Torres – OUSF Program Director

Rachel Curtis – OUSF Program Assistant - Enrollment Specialist

Jazmin Ford – OUSF Program Assistant - Compliance Specialist

Aubrey Call - OUSF Individual Placement Coordinator

Erin Johnson - OUSF Individual Placement Coordinator

Contacts

fellowship@oneutahservice.org – Please use this email for all member related inquiries so that everyone in the office has access to them. (If you send a member related email to an individual's email we will respond from the main email.) Emails regarding enrollments, member management or exits will be most common.

Program Acronyms & Terminology

AmeriCorps Portal - Federal Website where member will accept enrollment form invitation, complete the exit form, and complete tasks to request your award.

Banner – USU Payroll System

CC- Campus Coordinator

CNCS- Corporation for National and Community Service

Ed Award- Segal AmeriCorps Education Award

EEV- Enrollment Verification Form

IPT- Intern Placement Tracking

Member/Member Fellow- AmeriCorps participants are members, not volunteers because they receive stipend and monetary award at the end of their service term.

MPR- Monthly Progress Report

MSA Addendum- form to be signed by member and CC when a members start date is pushed back due to citizenship or identification verification issues

MSA- Member Service Agreement

NSOPW- National Sex Offender Public Website

SHR- Service Hour Record

SS- Site Supervisor

OUSF – One Utah Service Fellowship

UServe- UServeUtah, Utah Commission on Service and Volunteerism

VMP- Volunteer Mobilization Project

Accounts/Websites

One Utah Service Website – (www.oneutahservice.org)

The website is our host for all program information. As much as possible, we should direct people looking for information or instructions.

IPT (www.runipt.com)

IPT is the online tracking system used by all USERVE-run AmeriCorps programs. This is the main website where everyone will spend the majority of their time. Various enrollment forms, monthly forms, and exit forms are housed on this website.

Coordinator Responsibilities with IPT

Coordinators will have access to Enrollment, Active Fellowship, Exiting and Exited Groups for every grant year which they have students in.

Past Program Assistant Tips:

- The group list controls what you see in the student list. There is a **Select All** and **Unselect All** button that makes it easy to remove or add all members from the list. Some Program Assistants found it helpful when doing enrollments to only select the group they were working on. Use Ctrl+F to search the page for the exact groups you want to select.
- Ctrl+F is also helpful when trying to find a member's name in the full Student list.

Coordinators are responsible to ensuring the following forms or information is uploaded/correct in IPT:

- National Sex Offender Registry Check (NSOPW)
- Position Description into Member Service Agreement
- Change of Site Supervisor Forms/New Position Description (if applicable)
- Changes to contact information
- Member Service Agreement

Monthly Reports

Coordinators will be able to view all Service Hour Records and Monthly Progress Report forms in IPT to make sure members are on track and completing their forms correctly and have the ability to clear member's signatures to reopen a monthly form if there is an error that needs correcting or a change needs to be made.

Campus Coordinators are required to submit bi-monthly updates in regards to the progress of their active Fellows.

See the IPT Guide for more in-depth information in the Appendix

Tips:

- o The group list controls what you see in the student list. There is a **Select All** and **Unselect All** button that makes it easy to remove or add all member from the list.
- o Ctrl+F is also helpful when trying to find a member's name in the full Student List.

Campus Coordinator Section on Website – (www.oneutahservice.org - Under For Partners)

The Campus Coordinator Section is password protected – UHEANCC

Most of the answers to the questions we receive from coordinators either through emails or phone calls can be found on our website.

Enrollment Spreadsheet and Exit Spreadsheets

Campus Coordinators and OUSF staff have access to what the enrolling members have or have not completed. Using your OUSF email, you will have access to edit and update the spreadsheets as enrollments and exiting tasks are completed. This is how we communicate to Campus Coordinator's in mass rather than sending individual emails for each member.

National Sex Offender Public Registry Website (www.nsopw.gov)

NSOPW.org is open to the public and used by Campus Coordinators as well as OUSF Staff to run checks on enrolling members. Those listed on the NSOPR cannot serve in AmeriCorps Programs.

USU Box

While we intend to keep all relevant documents on the website or in the google drive, there are times when we will require submission of documents with sensitive information about members. Using the USU Box Drive, we will set up folders and send a secure direct link file request.

- o Campus Coordinators should use Box to access certain documents and to upload certain documents.
 - Citizenship Verification and eGrants name change documents should be password protected and uploaded here.
 - Box File Request is a secure way to request files and metadata from anyone, even those without a Box account. If needed, OUSF Staff will send the box request file link.

Banner

This dashboard will serve as a centralized hub for accessing and launching all Banner applications, consolidating them into one, convenient location. More information:

https://usu.service-now.com/aggies?id=kb_article_view&sysparm_article=KB0015589

This will be the website for participants who do not have a sub granted process to look at their paystubs and tax documents.

Service Now

USU ServiceNow is a platform that provides access to knowledge bases, service catalogs, and the new ServiceNow interface for Utah State University (USU) organizations. The interface allows users to view tasks, requests, tools, approvals, and reimbursements. The service catalog also allows users to request services from USU organizations.

Airtable

Airtable is the external database system we use to collect information about partners, most site QSCs, and members. Sections of the database will end up front facing of the website including forms and host site information.

OUSF Policies

Cybersecurity Policy

OUSF will collect, handle, and protect Personally Identifiable Information (PII) in a sensitive and confidential manner according to Utah State University rules and using the following guidance.

- OUSF will access PII only as needed to complete authorized AmeriCorps and AmeriCorps work
- OUSF will ensure there is no unauthorized sharing of either verbal or written PII, (e.g., in response to links in emails, queries on websites, questions asked).
- OUSF will not save PII to non-secure networks.
- OUSF will ensure that written or verbal PII is disclosed only to recipients who have a need to know and are authorized to handle and process it.
- OUSF will minimize the collection and use of PII in performance of official duties.
- OUSF will not attempt to gain unauthorized access to systems or information (including PII).
- OUSF will use Secure File Transfer, rather than email, when handling PII electronically.
- OUSF will protect PII on mobile devices and completely delete files when finished.
- OUSF will immediately remove a hard copy from an office machine after copying, scanning, or printing.

- OUSF will immediately dispose of a hard copy that has PII or other sensitive information when it is no longer needed by shredding the paper.
- OUSF will not disclose any PII contained in any system of records, except as authorized by applicable laws, regulations, or AmeriCorps policies.

Member Communication

OUSF Program: Will communicate at least weekly during the member's enrollment and exit. Please utilize the enrollment and exit spreadsheets provided by OUSF staff for managing the status of your fellows.

During the member's term, they have the monthly newsletter via email, monthly emails for new forms, and compliance warnings if applicable.

Main communication is the OUSF email, but texting or calls are also used when necessary and notes should be included in the contact log for any non-email communication. Although you are receiving a communication allowance stipend, please ensure that when you are using your personal phone for calls or texts you route it through google voice app.

Drug-Free Workplace Policy

In accordance with the Federal Drug-Free Workplace Act of 1988, the program is committed to maintaining a drug and alcohol-free environment. Members are therefore notified that:

- The unlawful manufacture, distribution, dispensation, possession, or use of a controlled substance is prohibited in the workplace and places of service;
- Actions, including termination from the program, will be taken against any member for violations of such prohibitions;

As a condition of service as an AmeriCorps Member:

- Members will abide by the terms of drug-free workplace policy; and
- Notify the program director in writing if he or she is convicted for a violation of a criminal drug statute occurring in the workplace and must do so no more than five calendar days after the conviction.
- In joining AmeriCorps, the member agrees to remain drug-free for the remainder of the year.

As part of an ongoing member orientation and training, the program, if requested, will inform members about:

- The dangers of drug abuse in the workplace and service area;
- The program's policy of maintaining a drug-free workplace;
- Any available drug counseling, rehabilitation, and employee assistance programs; and the penalties that you may impose upon members for drug abuse violations occurring in the workplace or service area.

Grievance Procedures

In accordance with 42 U.S.C. 12636 and implementing regulations at 45 C.F.R. 2540.230, the following grievance procedures have been established by the AmeriCorps program to deal with grievances from participants, labor organizations, and other interested individuals.

Step 1 of the grievance process should be the filing of a written grievance by the affected party seeking personal relief in a matter of concern or dissatisfaction relating to any AmeriCorps program issues, such as assignments, evaluations, suspension, or release of cause. Should the affected party decide to file a grievance, the following options are available for settling a grievance:

Option 1: Resolution through Immediate Supervisor. Prior to initiating the formal written grievance procedure, the aggrieved member should refer the complaint to his/her immediate supervisor who will attempt to resolve the complaint by mediation.

Option 2: Optional Alternative Dispute Resolution (ADR). As a first option, a member may choose to have the operating site designate a neutral party to resolve the complaint. Please read the ADR section regarding specific guidance and time limits for ADR process.

Option 3: Grievance Hearing. A member may choose a grievance hearing to resolve the complaint. A written request for such a hearing must be made in writing to the Program Coordinator. Please read the

Grievance Hearing section regarding specific guidance and time limits for the grievance hearing and the grievance hearing decision.

Option 4: Binding Arbitration. Binding Arbitration is available to the affected party only if a grievance hearing decision is adverse or if no decision is made within 60 days of the filing of the initial grievance. Please read the Binding Arbitration section regarding specific guidance and time limits for arbitration proceedings.

Optional Alternative Dispute Resolution (ADR): ADR must be selected within 45 days of the underlying dispute. If a member chooses ADR as a first option, a neutral party designated by

(operating site) will attempt to facilitate a mutually agreeable resolution. The neutral party must not have participated in any previous decisions concerning the issue in the dispute. A hearing must be held no later than 30 calendar days after the filing of the grievance, and a written decision must be made no later than 60 calendar days after filing. Allegations of fraud or criminal activity must be reported immediately to the Corporation for National and Community Service's Inspector General. If the grievance pertains to discrimination on the basis of race, color, national origin, gender, age, or disability the member will be immediately notified in writing of his/her right to file a discrimination complaint with the Corporation's Equal Opportunity Office. (In general, the member has 180 days after the alleged discrimination to file a complaint with the Corporation.)

Receiving Qualified Site Contracts

Qualified Service Site and Contract (QSC)- As of 2020, our QSC's validate partnership for **four** years. Members must check on OUSF's website to confirm that their service site is on the list of qualified sites. If the service site is not on the list, members will need to have the site complete a Qualified Site Contract.

We use a digital QSC Form which is linked on our website.

For Campus Coordinators working with School Districts or Non-Profit Medical Systems, an Umbrella QSC is available to be completed by someone in the District Office or Administration to cover multiple sites or schools.

At least quarterly, but monthly, if possible, you should complete the following:

- Ensure that any new QSC's have all required information so the shared view of the database is up to date on the website

OUSF Terms of Service Considerations

Determining hours

OUSF Program supports 100, 300, 450-, 675-, 1200-, or 1700-hour service terms.

Slot Types:

100 - Abbreviated Time; 300 - Minimum Time; 450 - Quarter Time; 675 - Reduced Time;

900 - Half Time; 1200 - Three Quarters Time; 1700 - Full Time

Programs are confined in the first semester by the slots they have asked for, if in the spring semester other slot types are available, they can be claimed by other programs.

Things to consider when helping members decide what number of hours, they will be able to serve:

- If the student is with a department-based program, consider the required minimum hours of the students' clinical, practical, internship hours.
- If the activities are confined to the school year or if they can complete hours over school breaks.
- If the member's position or placement continues into the next semester.
- If the member will also complete Member Development in addition to direct service hours. (Members are not required to record Member Development hours)

Service Term	100	300	450	675	1200	1700
Max. Member Development	20	60	90	135	240	340
Min. Direct Service	80	240	360	540	960	1360

Program Deadlines

OUSF Program requirements:

- Monthly forms are due on the last day of the month.
- Site Supervisors should sign off no later than the 5th of the month.
- Office Reviewers should sign off no later than the 15th of the month.
- Members have 30 days to be exited from the program to be exited in good standing.

Things to consider when setting and reminding students of deadlines:

- If the school has a deadline for when graduates can still receive their education award through the school. *Example, in order for USU Student Teachers to receive reimbursement for their award they must be enrolled before the first day of classes and must have completed their hours before the last day of classes in order for the school to still process their education award from the term they just completed.*
- What deadlines does the financial aid office have? Is there a cut off to retroactively use the education on the semester that the student completed the term? How soon can an education award be applied to the next semester?
- What number of hours per week do members need to complete in order to be exited by a specific deadline?
- Departmental or classes deadlines that students have to stay within.

Enrolling and Exiting Expectations

OUSF Program: Members must have all of their enrollment tasks completed before their start date. If they fail to complete their enrollment from non-activity after 1 month, they must restart the enrollment process. (See 30 Day Enrollment Policy for additional information)

They have 30 days after their End of Term Evaluation form has been signed or their last day of service per their MSA /MSA addendum to be exited from the program or risk their education award.

AmeriCorps Education Award Impact

AmeriCorps Members who are eligible for the Education award can receive the value of two full-time awards which is the equivalent of 2 Pell Grants.

In our program, members can serve a total of 4 terms, BUT because we only allow minimum, quarter, and reduced half time terms, even if a member completes 4 reduced half-time terms, they still will not have earned the financial equivalent of 2 full awards.

If a member has the ability to complete more than 1 term, we suggest establishing a plan for maximizing earned education awards for the amount of time they have to serve.

The Enrollment Process

Orientation – All members who have not participated in our program in the last 180 days are required to complete orientation either in-person or online as part of the enrollment process. Although we previously allowed for orientation to happen at any time during the enrollment process, we now require that it is completed at the beginning of the enrollment process.

Prospective members must take a quiz at the end of each orientation and pass with a score of 80% or higher (12/15).

- i. If an online orientation is scheduled a zoom link will need to be posted on the OUSF Fellowship Calendar.
- ii. We want to ensure we do our best to accommodate prospective members, even if there is only one person in attendance.
- iii. For cohorts of more than 10 members, coordinators can schedule in-person orientation rather than online orientation. The date and time will be noted on OUSF's website event calendar on the home page.
 - a) For in-person orientations, we need at least a two weeks' notice for travel, this is Utah State University policy.
- iv. For in person orientation of more than 20 people, we can ask to have a YUP representative available to run fingerprints.
 - a) YUP will not attend orientation unless scheduled by Janell and OUSF Staff.

Reminder: It is a requirement for Campus Coordinators to sit in on at least one orientation each year, as it will help them to better understand the process of AmeriCorps to communicate with their enrolling students.

In-Person Orientation

In person orientations are conducted for certain groups of enrolling members when Coordinators request that we facilitate one. Before commuting to the In-Person orientation you should prepare the following:

- At least two weeks in advance, complete the Travel Authorization.
- Make sure you have your computer, charger, and any other materials you will need.
- Ensure you know where you are going! What building and room will you be in? Where should you park / will parking be validated? Get parking codes if needed!

Once you have arrived, set up and are ready to begin you may conduct the presentation as normal.

- To collect attendees' non-school email addresses, you may either provide a contact sheet to pass around. Encourage attendees to write as legibly as possible. We will need to upload the list as supporting evidence to the Travel Reimbursement.
- Send the appropriate follow-up email when you get back to the office.

Start Dates

Official Start dates are every Tuesday. Start dates will be set for the first Tuesday, two to three weeks after the orientation. All enrollment forms must be completed on or before the start date excluding NSCHC background checks and BCI checks, which must be completed the day before the member's start date.

To remain compliant, there is an 8-day window time frame to enroll members. If members are not enrolled within 8 days of their start date they will have a delayed start date.

Enrollment Delay

If an enrolling student has not completed the enrollment tasks before the start date, forms will either be reset or an MSA addendum will be issued to be signed by the program director or assistant, campus coordinator, and member to sign. We will notify the member if there has been a change to their start date via the welcome email.

Coordinators are responsible to ensuring the following forms or documents are uploaded/correct in IPT:

- National Sex Offender Registry Check (NSOPW)
- Position Description into Member Service Agreement
- Changes to contact information
- Member Service Agreement

All items must be correct above before you and the member can sign the Agreement form, if you see an error, email fellowship@oneutahservice.org as soon as possible.

Position Descriptions - Coordinators should have a finalized Position Description form that includes member, coordinator, and site supervisor initials/signatures that verifies all parties have read and understand the Position Description. The Position Description needs to be uploaded into Section X. All pages, excluding pg 1-2, must be included for it to be considered as a complete position description.

All of these forms are located under each members' IPT account. From the home page of your IPT account you will have a "forms" tab indicating which forms are pending your signature. It will be easier for you to search for the member's account and complete applicable forms there.

Members will not be enrolled into the AmeriCorps Program until we receive and upload a clear background check.

Check the enrollment excel sheet at least once a week while you still have members in the enrollment process. You will have the ability to see the progress for each member who is enrolling, whether they have enrolled successfully or if there is a hold on the members account.

Once all enrollment tasks have been completed, OUSF must wait until the member's start date to complete their enrollment in the eGrants system. Members may begin counting hours on the date listed in the email from OUSF after they have officially been enrolled. This will happen only after all documents are completed and no errors are found in:

- NSOPW
- Background Check
- EEV
- MSA
- AmeriCorps Portal
- SS and Citizenship Verification

The member will receive an additional welcome email with information on completing monthly forms and other helpful resources.

30 Day Enrollment Policy

Each fellow either enrolling for the first time or re-enrolling will have 30 days to complete all their enrollment requirements or they will be removed from the enrollment process.

The 30 day enrollment countdown begins the day that OUSF staff receives the redcap entry **and** makes all accounts available to the enrolling fellow.

There are a few exceptions that will extend this:

- Background checks not coming back in time (This is out of our control)
- SS/Citizen Status Verification from Americorps (This is out of our control)

Items that are not exceptions:

- Accepting the Americorps Portal Invite
- Signing the EEV
- Completing position descriptions
- Signing MSA

NSOPW's are to be done by the campus coordinator. ***IF** there are several jurisdictions down and you are unable to complete the NSOPW in a timely manner, an extension might be granted, pending an email is sent to the fellowship email making them aware.*

Once the fellow has reached the 30 days they will receive an email letting them know they have been removed from the enrollment process.

This does not prohibit them from starting over or enrolling again at a later date.

All warning emails of incomplete tasks will be sent to the enrolling fellows prior to their removal and the assigned coordinator will be CC'd in each of those communications.

Getting Started

After Member Orientation, OUSF Staff has confirmed:

- ___ Member has completed the orientation quiz and passed with 80% (12/15).
- ___ Add the Member's Information to the Tracking Spreadsheet in the Enrollment in Process Workbook
- ___ Send Member the *Completed Member Orientation* Email.

After Member has completed the Enrollment Information Form (Redcap), [in IPT](#), OUSF Staff has confirmed:

- ___ OUSF created member profile in IPT.
- ___ OUSF moved member to "ENRIP" group for their program/institution in IPT
- ___ OUSF emailed member's login credentials for IPT
- ___ Assign member profile "field assignment" to "See position Description Section X"
- ___ OUSF Staff has batched the Member Service Agreement and Enrollment Eligibility Verification.

After Member has completed the Enrollment Information Form (Redcap), [in eGrants](#), OUSF Staff has confirmed:

- ___ OUSF staff has invited the member to their service term using the invite member feature.
- ___ OUSF Staff has updated the Tracking Spreadsheet in the Enrollment in Process Workbook

After Member has completed the Enrollment Information Form (Redcap), [via email](#), OUSF Staff has confirmed:

- ___ The Member's Fingerprinting appointment, date, time, and location and added that information to the Tracking Spreadsheet in the Enrollment in Process Workbook.
- ___ OUSF Staff has sent the member the Scheduled Fingerprints confirmation email and attached the Livescan form.
- ___ OUSF Staff has sent the member the *Accounts Available, Complete Enrollment Tasks* Email.

OUSF member is ready to be enrolled when OUSF Staff has confirmed:

- ___ OUSF Staff has cleared, adjudicated and uploaded the member's Background Check into IPT.
- ___ OUSF Staff received notification from Coordinator that the Member's enrollment documents were uploaded into IPT including the position description in the MSA, Section X.
- ___ Coordinator has properly completed the NSOPW check and it is uploaded into IPT.
 1. Check was run on ALL names (married & maiden – check enrollment information form)

2. All jurisdictions were reported.
3. Check has specific language attached.
4. If there are results, coordinator included explanation of results.
5. Coordinator included "reviewed by" and signed electronically with time and date stamp using the correct process.

_____ Member and OUSF Staff have completed the Enrollment Eligibility Form in IPT.

_____ OUSF Staff have verified, 1) the start and end dates in the MSA are listed correctly, 2) the name of the site supervisor is listed, 3. the total amount of money awarded is correct, and 4) the correct and completed position description is uploaded into section X of the MSA.

Note: Sometimes the wrong document is uploaded. If the form is signed when reviewing enrollments in process, best practice is to check the PD even if you already know where that member is going to be serving.

_____ Member and coordinator signed the Member Service Agreement (MSA) Form.

_____ Member's Service Site is on the list of OUSF's Qualified Sites. (If it's not, you must email the campus coordinator and request this information.)

_____ Member's service site was added to service site lists in IPT (if site was not already added)

_____ Review Position Description again, locate the site supervisor, and ensure a profile in IPT has been created for the site supervisor. Change the Site Supervisor at the bottom of the Member's detail page if it has not been changed already. Create a new profile for supervisor if there is not one already created. Ensure name, email, and phone number is updated and correct.

_____ Member's site supervisor was emailed their IPT login credentials and then sent the *Welcome OUSF AmeriCorps Site Supervisor* Email (only send if supervisor is brand new or has been inactive).

_____ OUSF Staff will check to make sure that the Member's SSN and Citizenship has been verified and is in the correct enrollment workbasket in eGrants.

When member's term of service is ready to be certified in eGrants, OUSF Staff has confirmed:

_____ OUSF Staff has moved the member's entire data row to the Master Spreadsheet in the Enrollments in Progress Workbook (Copy and Paste)

_____ OUSF Staff successfully enrolled member in eGrants by certifying that the (NSCHS Checks were completed the day before the start date, (NSOPW and Background Check were both adjudicated)) and submitted the enrollment.

After member is officially enrolled in eGrants, OUSF Staff has confirmed:

___ OUSF Staff has moved the member from the group "ENRIP" to the normal active group in IPT.

___ OUSF Staff has updated the member's detail page to match eGrants if necessary for a delay in enrollment or minimum slot change. In the contact log, explain the change (i.e. Member Enrollment Delay – Dates adjusted – MSA addendum Required.)

___ Member was sent a Service Hour Record and Monthly Progress Report for the month they enrolled.

___ If necessary, Member was batched an MSA Addendum and OUSF Staff completed and signed the addendum with the reason and updated information.

___ OUSF Staff has sent the member *the Welcome to your Term of Service* Email and included the attachment for how to complete their monthly forms based on their focus area.

Note: You can send members with the same start date and focus area one email, you just have to make sure that you BCC the participants.

___ OUSF Staff has updated the Enrollments in Progress Workbook to account for the completed enrollment in the Master Spreadsheet, Completed Enrollments Spreadsheet, Enrollment Slots Spreadsheet, and Tracking Spreadsheet (how many slots are remaining).

___ OUSF Staff has noted in the enrollment spreadsheet the reason for delay- if applicable.

Background Checks

Members need their fingerprints taken by an authorized vendor so that we can run their FBI background check. Members must provide written consent before obtaining fingerprints. Members consent to a background check by selecting “yes, I consent to a background check” in the enrollment redcap form they are sent. This will also include the instructions on how and where to schedule a fingerprinting appointment.

Upon receipt of any criminal history results in the state or federal criminal history check, OUSF will call the site supervisor of record per the Member’s Position Description. If the Qualified Site Contract signed at the site has outlined allowable results, the site supervisor will not be called for history falling within the allowable results.

Per Corporation for National Service policy, the following criminal acts will automatically result in denial of access to the AmeriCorps Affiliated Program:

- Murder (national mandate)
- Conviction which lists the prospective member on the national sex offender registry (national mandate)

For all other criminal history, OUSF generally leaves it to the discretion of the supervisor and their government/non-profit organization to determine whether the AmeriCorps member can serve at their site; they often have to communicate with the human resources department or risk management team.

If the organization does not have an articulated policy, and OUSF believes the AmeriCorps members’ criminal history is a potential threat to clients, particularly vulnerable populations (children age 17 or younger, persons age 60 and older, and/or individuals with disabilities) and/or is not in the spirit of AmeriCorps service, OUSF may deny the individual access to, or exit them from Program.

Misdemeanor violations, other minor offenses older than 10 years, and charges without convictions typically will not disqualify a person from participation in an AmeriCorps program. However, each criminal history check with results is reviewed by a OUSF staff member and a determination is made on a case-by-case basis.

Criminal history findings are shared with Site Supervisors per the policy outlined above. In addition, per Utah Commission on Service and Volunteerism policy, OUSF will upload the first page of the state and federal criminal history check results in the required member management system, IPT. In order to protect highly confidential information within the history checks (example, Social Security Numbers), OUSF will redact the social security number and remove all pages except for page one prior to uploading in IPT.

NSOPW Check

Coordinators are required to run an NSOPW Check on members FIRST and LAST NAMES (last names include their maiden and married last names) as are listed on a member's government-issued ID. You should NOT RUN MIDDLE NAMES OR NICKNAMES! This check must be dated, have all jurisdictions reported (all states, territories, and tribal governments must be reported), specific language included, electronically signed with time and date stamp by coordinator the day before the members first day of service.

- o Ensure the check was run on all legal names by looking at the member's Enrollment Eligibility Form for maiden name or other aliases. It will also be listed on the enrollment spreadsheet.
- o All jurisdictions must be reported. If a state is missing it will show up in blue.
 - If a Jurisdiction is missing you can wait until there are no jurisdictions missing and run the report again OR you can go to the site for the missing jurisdiction(s) and attach that report.
- o The following language must be added by the person which reviewed the check.
The results of this check were reviewed and used in determining eligibility for an AmeriCorps position. This criminal history check was performed in accordance with the Serve America Act to determine eligibility for service in an AmeriCorps program. Any further dissemination or use of this check is prohibited by state statute 53-10-108.
- o The following language must also be added by the person which reviewed the check, if the check **did returned results**: **I have reviewed this NSOPW check in its entirety and verify that this member is not listed on this check because: (proceed to list how you know it's not the member) the names do not match member's name, birthdates do not match member's birthdate, (etc).**
- o The check must be electronically signed by the person who reviewed it.

Enrollment Eligibility Form Check

- Select **"Forms"** in the member's IPT profile, open **"Enrollment Eligibility Verification"**.
 - o TIP: You will have opened this form to check that all legal names were run on the NSOPW. Save time by reviewing this form while you have it open.
- Some of the information at the top of this form will have auto-populated from the member's profile. Ensure that they have filled out all fields following the phone numbers near the top.
- Make sure the member signed the form with their full name. The signature should match the name that was auto-populated on the form. In some cases, the member signs with a partial name. If this is the case the signatures have to be cleared and re-signed.

- Check the age requirements section and make sure there is a document number that verifies age.

Member Service Agreement Check

- While still under “**Forms**” in the member’s IPT account, open the “**Member Service Agreement**” (MSA).
- Review the dates and hours shown at the beginning of “**III. Terms of Service**” under section A and B. The service end date should be 12 months after the service start date. These dates must match the dates found in the member’s IPT profile. The term hours (300, 450, etc.) must match those found in the member’s profile. Discrepancies will require signatures to be cleared or an MSA addendum.
- Review the dollar amount that the member will receive upon successful completion of the program and ensure that it matches the amount that should be awarded for their term hours. Under “**V. Benefits**” section C. you will find the dollar amount that was assigned in the member’s profile. Compare this to the key under section A. to ensure it is the correct amount. Also check to verify that the living allowance amounts are correct.
- Hold down the space bar to scroll to the bottom of the page.
- Under **X. Amendments to this Agreement** select “**view**” to open the Position Description. UServe requires that the PD be uploaded within the MSA. It should not be uploaded elsewhere.

Position Description Check

- Ensure ALL fields are complete with necessary initials and signatures.
- Ensure that ALL pages (excluding 1-2) of the position description have been uploaded. Pages 3-7 must be present.
- Service Site Verification
 - Compare the “**Service Site Name**” to the list of Qualified Sites found on our website to ensure that the site has turned in their **Qualified Site Contract**. In rare cases this list will not be up to date.
 - If we do not have a QSC for the member’s site you may email the coordinator using the canned response.
 - Certain programs are treated like Service Sites and require only one umbrella QSC: e.g. SUU Nursing and U of U Architecture. Check with the Program Director if there is any confusion about this.

Member's SSN and Citizenship Check (eGrants)

Beginning on 7/1/2018, all members must be pre-enrolled in the eGrants system, so that their Citizenship and Social Security verification checks can be completed before the member's start date. In order to be pre-enrolled, the following must be completed:

- The Campus Coordinator must have completed and uploaded the NSOPW into IPT.
- The Background Check must be uploaded by OUSF staff into IPT.

If the member is a Legal Permanent Resident, they will need to provide us with a copy of their Permanent Resident card and Social Security card so we can submit them to CNCS.

If a member has a different legal and social name, we will also need a copy of the Social Security Card and legal document for the reason for difference.

We will have to submit identification documents to AmeriCorps and it will delay the enrollment process by at least a week because of the manual verification process.

Common enrollment issues and how to address them

Some canned responses exist for certain common issues. In other cases, it is beneficial to edit a canned response to fit the particular issue you need addressed. There are five items that affect the day the member may start counting hours. These include: The date the Member signed their **MSA**, the date the Member signed the **EEV**, the date the **BCI** was adjudicated, the date **SSN/Citizenship verification** in the AmeriCorps (egrants) portal was verified, (after the fellow accepted the invitation), and the date the **NSOPW** check was run. The member may start counting hours on the latest of these dates and their start date.

- *Start and/or End Date do not match those in the MSA.* It is necessary for all contracts to match one another. Once the member is enrolled, we will batch an MSA addendum in IPT and complete the form with the applicable reasoning and term changes.
- *Fingerprint date is missing or old.* Members who are re-enrolling within 180 days of their last term of service with our program do not have to get fingerprints taken again. Check the "**eGrants exit date**" in the member's previous IPT account to ensure that they have not surpassed the 180-day window.
- *National Sex Offender Public Website (NSOPW) check is missing names, required language, signature, or missing all together.*
- *Enrollment Eligibility Form missing signatures.*
- *Member Service Agreement (MSA) is not signed by Member or Coordinator or is missing position description in section x.*

- *Missing Qualified Site Contract (QSC).* If the contract is on its way you may continue enrolling the member. If we do not get a contract during the member's service they will have to be exited without award.
- *Incomplete My.AmeriCorps.Gov Portal.* Members are invited to accept their term of service via an email. Sometimes they have issues. 1) send them the alternative directions found in the canned responses and if that does not solve the problem 2) direct them to the AmeriCorps Hotline.

Site Supervisor Changes

An AmeriCorps member is allowed to change site supervisors at their site if their current supervisor has left the position or if they can no longer supervise the member. There is a "site supervisor change form" in the Google Drive. The site supervisor change form must be uploaded in the AmeriCorps member's profile either under "supporting document 2" or "custom fields".

Here is what you do for a site supervisor change in IPT:

1. Indicate if the new supervisor has an IPT profile or not (sometimes we have previous supervisors who help out again). If they are not there, you must create the new supervisor an IPT profile, ensure you send them their IPT logins. If they already have a profile with us, move on to the next step.
2. Go to the member profile and scroll down to "Field Assignment". You will move the current supervisor down to placement 2 or 3 (depending on how many supervisors are there, you just keep moving them down one space). After you reassign the old supervisor placement, you will click on "change" and add the supervisor to placement 1.
3. Email the coordinator after this change has been made.
4. Lastly, you will email the new site supervisor with the Welcome Email. This will help them as they get started.

Service Site Changes

If an AmeriCorps member is changing service sites and not just site supervisors, they must complete a brand-new Position Description form. This document must be uploaded in "supporting document 2" or "custom fields". Please include in the notes section of the student detail page what the document is and which field you uploaded it to.

Service Hour Record Forms and Monthly Progress Reports

Members must complete TWO forms each month while they are in service, regardless of whether hours were served or not.

a) Service Hour Records

- Service Hour Records will have check boxes with descriptions for members to choose from for their “Description of Days Activities” column. This will ensure that members stay compliant with their hours.
- Ensure members are using the correct language in the “Description of Days Activities” column. Language must fall within their focus area. See language document in a few pages.
- Please make sure members are not recording hours on days that do not exist. FYI the Service Hour Records dates are numbered 1-31, those are the days of the month. Make sure you know what numbers correlate to the day of the week.
 - Tip: Keep a printed calendar handy.
- Make sure **no more than 20%** of the member’s total hours are counted as Member Development.
- Members **can’t log more than 60 hours** per week (Sunday-Saturday), nor can they log travel or commuting hours.
- Service Hour Records are due on the **last day of each month**. For instance, September’s Service Hour Record would be due on 30. If they fail to submit two consecutive Service Hour Records, they are out of compliance and at risk of exiting without award in poor standing.
- Make sure neither member nor coordinator have signed the Service Hour Record before the hours were actually served.
- Hours served before the official start date can NOT be counted. Hours served after the official end date can NOT be counted.

Only 15-minute increments should be counted, hours should be saved in the following format.

15 min = .25 45 min. = .75

30 min = .50 1 hour = 1

Members should round up or down to the nearest 15-minute mark. Enter your time in the correct category as described on the form, either Member Development or Direct Service. In the daily description box, members will select the drop-down item that describes what they did that day in relation to their AmeriCorps service.

Members are required to enter the description “No Hours Served” in the direct service column for any day that they did not serve. At the end of their service for that time period, they will submit their Service Hour Record.

The member may enter time at any point AFTER the service has been completed, before the due date. Early submission of time is considered to be fraud and can be grounds to terminate an AmeriCorps term.

When the member enters their name, they declare and affirm under penalty of perjury that the statements made herein are true and correct to the best of their knowledge, information and belief and that the time entered was completed by the member on the dates indicated. They further declare that this time was spent performing allowable AmeriCorps activities. Once they have submitted their Service Hour Record, an automated email will be sent to the site supervisor responsible for overseeing the member’s hours for approval.

Using and completing the monthly progress reports will be similar in form.

b) Monthly Progress Reporting (in IPT)

- Members will also answer demographic and other performance measure questions known as the Focus Area Questions.
- Members must provide a narrative (member development and direct service) for each month they serve! They will record this info in the monthly report form in IPT.
- Members must have a **Great Story** written for each month they serve! The story must be at least **100** words in length. They will record this info in the monthly report form in IPT.
- Members are required to mobilize at least **5 volunteers** to serve a minimum of 1 hour each for their service term. They will record this info in the monthly progress reporting form during the month the volunteers served.
- Coordinators must ensure members are submitting this form each month in addition to Service Hour Record Forms.

IPT Service Hour Record Form - Explanation of “Description of Days Activities”

Each activity correlates to certain focus fields. Service Fellows should **NEVER “Check All” the activities.**

Service Fellows should only check off items that reflect the activity they did for that day - as long as it correlates with their focus field.

Descriptions in Blue are the expected descriptions per focus area.

Healthy Futures Focus Field may choose one or more:

No Hours Served

Member Development/Training

Health Related Services

Client Assessment and Evaluation

Volunteer Recruitment/Management/Mobilization

Armed Forces Reserves Training

Community Engagement/Outreach

Provide Training/Education/Outreach

Education Focus Field may choose one or more:

No Hours Served

Member Development/Training

Student Education Activities

Curriculum and Material Development

Volunteer Recruitment/Management/Mobilization

Armed Forces Reserves Training

Community Engagement/Outreach

Provide Training/Education/Outreach

Capacity Building Focus Field may choose one or more:

No Hours Served

Member Development/Training

Community Engagement/Outreach

Program Planning/Execution and Management

Volunteer Recruitment/Management/Mobilization

Armed Forces Reserves Training

Community Engagement/Outreach

Provide Training/Education/Outreach

Activity Definitions:

Client Assessment and Evaluation – time spent assessing or evaluating clients and patients.

Community Engagement/Outreach – time spent voting, participating in 9/11 day of service activity, MLK Day of Service, and other community engagement/outreach activities determined as allowable by OUSF.

Curriculum and Material Development – time spent creating lesson plans, developing tests, quizzes, blue prints, materials for college access and success, etc.

Health Related Services – time spent providing direct health related services to patients and clients.

Member Development/Training – time spent in class, trainings, meetings, conferences/workshops, attending AmeriCorps member gatherings, and/or reflection on your service. *These activities must relate to your service and must be logged under Member Development column.*

No Hours Served – select this when you did not serve hours that day or that month.

Program Planning/Execution and Management – time spent planning events, programs, partnerships, projects, and/or managing programs.

Provide Training/Education/Outreach – time spent training or educating clients, patients, students, and/or community members on topics related to your service. Outreach - time spent providing services to populations who might not otherwise have access to those services.

Student Education Activities – time spent mentoring, tutoring, teaching students.

Volunteer Recruitment/Management/Mobilization – serving with volunteers in these capacities. Will be used mostly for Volunteer Mobilization Projects. Be sure to use this option when you have recorded mobilizing volunteers for the matching months Monthly Progress Report. These hours will be logged under the Direct Service column and are only representative of the hours in which you the member served. The total volunteer hours will be counted/logged on the Monthly Progress Report.

Ongoing Processes during Fellowship Service Terms

Monthly Form Audits

Service Hour Record Forms and Monthly Progress Reports should be audited at minimum every two months minimum to ensure all members are in compliance with the program requirements. Members who are two or more months behind on submitting their forms may be exited from our program without award if they are unable to complete the late forms in a timely manner. The Program Assistant will work with Campus Coordinators to contact non-compliant members. The Program Director will make final decisions about exiting members without award. The Program Assistant's role in Monthly Form Audits will be simply to check if forms have been submitted or not.

You will be assigned programs to audit. Check each program one at a time to shorten the length of your student list while auditing.

- Select the "Group List" tab
- "Unselect All" members
- Search for the program you wish to audit and select Enrolled and EIP groups within that program.
- Select the "Student List" tab
- Open each member's profile and view their forms list. Disregard forms that are not due yet.
- Find the Student's Paper Tracking Sheet in the Member Audit's Binder.
- Audit any forms that have not been signed off on the sheet including incomplete forms (forms that are not fully signed – 4 signatures SHR; 3 signatures MPR)
- Email the Member and the Campus Coordinator with the results of the audit and any corrections that need to be made.
- If there are any members who are non-compliant, email the list to the Program Director.

Service Hour Record Forms

- Reviewing SHR's requires great attention to detail. Look at these forms closely.
- Use the physical Audit Template to record Member Development Hours, Direct Service Hours and any hours that must be disqualified.
- Record all issues in the "Notes" section so that you may contact the member with a complete list of items that need to be addressed before exiting.
- Make sure to check for the following:
 - Verify that there are forms present for every month the member has been in service.

- o Verify no hours were counted before the start date or the date the member is allowed to begin counting hours as noted in the contact log. Disqualify any hours that were.
- o Verify that the correct drop-down description options were chosen for the hours logged. Direct Service hours should be described with a drop down that matches the members focus area. Member Development hours should be described with the Member Development drop down option. Voting hours should be described with the Community Engagement drop down option. More than one drop can be selected.
- o Verify that the member did not exceed 60 hours in any single week (Sunday-Saturday). Disqualify any hours that do.
- o Disqualify fundraising hours as they are not allowed in the OUSF AmeriCorps Program.
- o Verify that the date the member signed was not before the last day hours were logged in that month.
- o Ensure forms are signed by both Member and Supervisor.
- o Verify that no hours were counted after the member's last day of service listed in the MSA (12 months from the original start date).
- o View member's Dashboard, ensure the member did not go over allowed member development hours (20%) any overage must be removed.
- TIP: If you move the SHRF window to your second monitor you can select other SHRF's from your first monitor and the form will be replaced by each one you select. This is faster than closing the form to open a new one.

Monthly Progress Reports

- Ensure that a Service Hour Record Narrative and Great story have been written for all months in which hours were logged.
- Verify that a Volunteer Mobilization Project was completed by the member and that it meets all requirements.
 - o A total of 5 non-members were recruited to volunteer for at least 1 hour each.
 - o A narrative was written demonstrating that the project directly benefited the member's Service Site or the community the member is serving.
- Log the VMP data on the Audit Template sheet next to the month(s) that it was completed.

Enrollment and Exit Window Audits

In order to ensure that members are not enrolled outside 8 days or exited outside the 30 day window, reports can be run to find members who may have fallen through the cracks during regular processes.

On the last day to enroll members for a given start date you can run a report to ensure no members were missed.

- Select the “Reports” tab
- Select “Student Custom Export”
- Select “Student First Name”, “Student Last Name”, and “Start Date”
- Select “Run”
- Select all ENRIP groups for the grant year you are auditing.
- “Export Data”
- To make all “#####” appear as actual dates you will double click the right side of the column.
- Move column C (the start dates) to column A. Select the left corner arrow to highlight the spreadsheet. Find the “Sort and Filter” drop down and sort your sheet from oldest to newest.
- Members with the earliest start dates will appear at the top.

To find members with approaching end dates:

- Select the “Reports” tab
- Select “Student Custom Export”
- Select “Student First Name”, “Student Last Name”, and “End Date”
- Select all Enrolled and EIP groups for the grant year you are auditing.
- “Export Data”
- To make all “#####” appear as actual dates you will double click the right side of the column.
- Move column C (the end dates) to column A. Select the left corner arrow to highlight the spreadsheet. Find the “Sort and Filter” drop down and sort your sheet from oldest to newest.
- Members with the nearest approaching end date will appear at the top.

The Exit Process

We encourage members to contact their campus coordinators if they are within *two weeks* of finishing their service to begin talking about the exit process. We also recommend campus coordinators keep an eye on their members' accounts in IPT and contact them if they are close to exiting as to not delay the members' opportunity to receive their Education Award or miss out on being able to re-enroll in a new term.

To remain in compliance, members **MUST** be fully exited from the program within 30 days of the End of Term Evaluation being completed or the last contract date whichever is first.

Types of Exits Explanation

Exit with Award (Most Exits)

- Within a few days of the **Unlock Exit Form** being completed successfully, OUSF Staff will:
 - a. Add the member's information to the exit spreadsheet
 - b. Send the member the initial exiting email which will include all relevant links and instructions for the exit process.
 - c. Unlock the End of Term Evaluation and the Exit Form in IPT.
- In order for OUSF to begin the final audit, the End of Term Evaluation must be completed by the Site Supervisor, Member, and Campus Coordinator. The monthly forms must also be completed.
- OUSF will complete the final term audit and request any changes that need to be made via email.
- Once all forms in IPT are correct and completed, we will unlock the final exit task of certifying service term hours in the My.AmeriCorps.gov portal and finalize the member's exit.

Exits without Award

Exiting the OUSF Program without Award in Good Standing

In order to exit from the OUSF program in good standing, the member is required to complete all exit items as if they were exiting with their award. They also need to complete a letter of Compelling Personal Circumstance which explains why they are exiting from the program early without completing the requirements as per their Member Service Agreement. Whether they are granted the status of good standing is at the discretion of OUSF Staff.

Early Release from Service

Members may be released for two reasons: "cause" or "compelling personal circumstances."

"Cause" is defined as:

- Violating the rules of conduct and or participating in the prohibited activities

- Dropping out of the program without obtaining a release;
 - Dropping out of the program is constituted as having two or more consecutive months of forms incomplete and failing to respond to contact from both the OUSF Staff members, Campus Coordinators, and Site Supervisors. Student members who may seek to exit from the program, but do not complete the full requirements of exiting from the program will be exited without any of their award in poor standing regardless of hours served.
- Being charged with a violent felony or the sale or distribution of a controlled substance; or
- Any other serious breach that in the judgment of the Program Director, would undermine the effectiveness of the program.

Participants must disclose their release for cause on any subsequent applications to AmeriCorps programs.

“Compelling personal circumstances” include those that are beyond the participant's control, such as, but not limited to:

- A participant's disability or serious illness;
 - The OUSF AmeriCorps Program takes mental, physical, and emotional health very seriously. Members who are experiencing any type of disability or serious illness impacting their ability to complete their term of service are encouraged to contact OUSF Staff about whether a suspension or early exit from service is most applicable to their situation.
- Disability, serious illness, or death of a participant's family member if this makes completing a term unreasonably difficult or impossible; or
 - The OUSF AmeriCorps Program takes mental, physical, and emotional health very seriously. Members who are caretakers of someone experiencing any type of disability, serious illness, or death of a family member impacting their ability to complete their term of service are encouraged to contact OUSF Staff about whether a suspension or early exit from service is most applicable to their situation.
- Conditions attributable to the program or otherwise unforeseeable and beyond the participant's control, such as a natural disaster, a strike, relocation of a spouse, or the nonrenewal or premature closing of a project or program, that make completing a term unreasonably difficult or impossible;
 - The OUSF AmeriCorps Program will rarely enforce a program wide exit, in cases such as the beginning of the COVID-19 Pandemic, suggestions will be made in a tiered response that is dependent on the situation and those who will be impacted.

- o Individuals who face unforeseeable circumstances beyond their control are encouraged to contact OUSF Staff about whether a suspension or early exit from service is most applicable to their situation.
- o Non-renewal or premature closing of a project or the Program itself is defined as closing before the End Date of the Member's Term according to the signed Member Service Agreement and/or Member Service Agreement Addendum.

Those that CNCS, has for public policy reasons, determined as such, including:

- Military service obligations;
- Acceptance by a participant of an opportunity to make the transition from welfare to work; or
- Acceptance of an employment opportunity by a participant serving in a program that includes in its approved objectives the promotion of employment among its participants.
-

Personal circumstances which do not constitute leaving the Program:

- To enroll in school or take more credits in school
- To obtain employment, other than moving from welfare to work
- Because of dissatisfaction with the program

Unless a member has a compelling circumstance that requires them to exit “for compelling personal reasons”, every effort should be made so the member completes their term and exits the program with an education award. Depending on the circumstances, members can either be exited without award in good standing or in poor standing. If the member is exited without award in good standing, they will still have the opportunity to join any AmeriCorps program in the future should they choose to do so. If the member is exited in poor standing, they will be disqualified from joining any AmeriCorps program in the future. This will be determined by the Program Director.

Member Directed Early Exit Process:

- After speaking with the member who is seeking to exit, the coordinator needs to communicate the situation to OUSF Staff about the member who is exiting without award.
- In addition to completing all normal exit requirements, in order for the member to exit in good standing, the member must write a short letter explaining the reason for their early exit without award. A signature from the person who wrote the letter must also be included in the letter. The coordinator must upload the letter in the “supplemental documentation” section in the member's IPT profile.

- The EOTE must also contain information about the reason for exiting early

Getting Started – Exit Process Checklist

The exit process begins by checking the google sheet entitled - *Exit Unlock Request (Responses)*. This form lets OUSF Staff know that the member has finished the minimum requirements of their service term and are ready to exit.

___ Member's Information was added into the applicable Grant Year's Exits in Progress Google Spreadsheet under their program. (Name, the date the unlock request was received, priority of the exit, the date you added the 2 IPT exit forms.)

___ In IPT, member was moved to the "EIP" Group for their school/institution.

___ In IPT, member was batched the End of Term Evaluation (EOTE) and Exit Form.

___ Member was sent the *[Action Required] Term of Service Exit Forms Unlocked Canned Response*.

___ Site Supervisor was sent the *AmeriCorps Fellow Exiting Soon! - Please Complete Forms Canned Response*.

Once the End of Term Evaluation (EOTE) has been completed in IPT, the indicator that the member is ready for OUSF to officially start working on the member's exit, OUSF Staff has confirmed:

___ Member's End of Term Evaluation has been properly completed in IPT, all required spaces are completely filled with required signatures. (If not, clear signatures and email the corrections to the Site Supervisor and return to this step once the EOTE is correctly completed.)

___ Member's status is updated in the "Exits in Process" Spreadsheet. (Change status explanation, the date the EOTE was completed, and the last day of the 30 day exit window)

When OUSF Staff is ready to begin working on this member's exit, OUSF Staff has confirmed:

___ OUSF Staff Member has updated the Member's Status in the Exit in Progress Spreadsheet (Claiming the Exit Audit as their own and adding the date they begun the audit.)

___ Using the physical paper Exit Template form, OUSF Staff has prepared the Member's Exit Audit by verifying their name, program/institution, number of hours completed, focus area, and all the months that the member was in service (look at the start date listed in IPT). This form should be at least partially filled out due to the monthly form audits.

OUSF must review all Service Hour Record forms and ensure the items below are correctly completed:

___ OUSF Staff has verified that there is a Service Hour Record form in IPT for every month the member has been in service. If the member is missing a month, please send out the Service Hour Record form to that member and notify the member of the situation.

___ OUSF Staff verified no hours were counted before the start date and/or before the allowed start date per the MSA Addendum. (Also make sure the MSA addendum is completely signed by all parties).

___ OUSF Staff has verified the member used the correct drop-down menu description items that correspond to the member's focus area.

___ If a member included hours in the member development column or in the direct service hour column, make sure the correct language/check boxes have been entered/selected and all hours are in the correct columns.

___ OUSF Staff has verified the member did not go over 60 hours in a week in their Service Hour Record forms (Sunday-Saturday). Disqualify any overages.

___ Disqualify any fundraising hours that are recorded, unless the member had explicit approval from OUSF Staff - verify with contact log first then with Program Director.

___ OUSF verified no hours were counted after the member's last day of service as listed in their member contract. Disqualify hours counted past last day of allowed service. (Normally 12 months minus 1 day).

___ OUSF Staff verified neither member nor site supervisor signed the Service Hour Records before the hours were served.

___ OUSF Staff verified all Service Hour Record forms have been signed by both the member and the site supervisor.

___ View member's Dashboard, ensure member did not go over allowed member development hours and that the member still meets the minimum required after disqualified hours.

OUSF Staff must review all Progress Reporting forms in IPT to ensure the items below are correctly completed. :

___ OUSF Staff verified that the demographic information listed in the monthly progress reports have been filled out.

___ OUSF Staff verified that the populations served information is included in the monthly progress reports.

___ OUSF Staff verified the member entered in service activity narratives if they accrued member development and/or direct service hours in correlation with their service hour record forms.

___ OUSF Staff has verified member has written a great story for each month they provided direct service.

___ OUSF Staff verified that all Great Stories demonstrated impact that relates to the site and/or the people the members serves

___ OUSF Staff verified member completed volunteer mobilization project. Member recruited at least 5 volunteers and those volunteers served for at least 1 hour per volunteer. Project or projects were recorded in the monthly report(s).

___ OUSF Staff verified that the Volunteer Mobilization Project directly benefited the member's service site and or the people the members served.

___ Member's exit status has been updated in the Exit in Progress Spreadsheet to show which exit tasks are pending, in progress, or completed.

After OUSF Staff has verified member file is complete and compliant in IPT, OUSF Staff has confirmed:

___ Unlock the Exit Form in eGrants and sent the Member and Campus Coordinator the *Certify Term of Service Hours [Action Required]* Email.

___ If the Site Supervisor, Campus Coordinator, or OUSF Office Review have not signed off on forms, also send them an email to sign those forms.

After OUSF Staff has verified member has completed their term of service certification, OUSF Staff has confirmed:

___ The member's term hours are correct prior to exiting. Double check the term hours listed in eGrants and the term hours listed in the MSA/MSA Addendum to ensure they both match.

___ OUSF Staff has ensured that the date the member is being exited is within 30 days of the completion of the End of Term Evaluation or the eGrants exit date, whichever is sooner.

___ Member has been exited from the program in eGrants

___ Copy the eGrants language that explains "The member has successfully exited" and paste the language in the member's contact log in IPT.

___ Update the member's eGrants Exit Date in IPT with the date you typed into eGrants when exiting the member.

___ Change the "Exit Status" to "eligible for entire education award (member successfully completed service)"

___ Change the member's group status to the institution/program's "Exits" group.

___ Member's exit status has been updated in the Exit in Progress Spreadsheet to "Completed Exit"

___ Member's exit has been tallied and recorded in Exit in Progress Spreadsheet, then moved to the completed exit workbook.

My.AmeriCorps.Gov Issues

Password Resets

OUSF Staff does not have the ability to reset passwords for this website because it is a federal website. We suggest that members use Last Pass or another password manager to keep track of the password. If the member needs their password reset, they will need to contact the national AmeriCorps Hotline.

1- 800-942-2677. The Hotline is staffed by customer service representatives from 7:00 a.m. – 5:00 p.m. MST, Monday through Thursday. During high volume months--- January, May, June, July, August, and September--the Hotline will be staffed on Fridays.

We suggest that they take notes on who you spoke to and when.

AmeriCorps Education Award Issues

OUSF Staff also does not have the ability to see the payment requests.

If for some reason the member has other issues pertaining to their education award, they should contact us directly so we can give them further directions.

Required Communication and Reporting Deadlines for Coordinators

There are two mandatory trainings per year that campus coordinators must attend as a requirement of the Program Agreement, specific dates will be shared at Annual Training.

Notice of Funding and Grant Application Training – End of January

New Grant Year Annual Training – End of July

OUSF Campus Coordinators will also be required to complete one reporting call per period with a member of the OUSF Staff. Specific reporting measures will be established during the yearly Annual Training.

October (End of Fall Enrollment Season)

December (End of Fall Term)

February (End of Spring Enrollment Season)

May (End of Spring Term)

Any presentation materials from training calls will be uploaded to the website for review at any time.

Additional trainings may be needed throughout the grant year and Campus Coordinators will be notified ahead of time of those calls.

Appendix A: Basic IPT User Guide

Logging In

Prior to logging in the first time, you will receive an email with the following:

To access the AmeriCorps tracking system:

www.runipt.com

ORG ID: ucovac

Default Username and Password

Welcome to the UServeUtah AmeriCorps Member Tracking System. Please use the login information listed above to access the required forms for this program. Please bookmark the site runipt.com and our organization id: ucovac.

You may be receiving this message instead because your password has been reset on the Utah AmeriCorps Member Tracking System. If you did not initiate this reset, please contact your AmeriCorps Program Director as soon as possible.

After logging in for the first time, using the default Login Name and Password you will be asked to create a new Login Name and Password. These are case sensitive and must be kept confidential. Be sure to create a Login Name and Password that you can remember.

Change account login information

Login Name New Password Confirm New Password Password Strength ■ ■ ■ ■	Password Strength Requirements: A password must contain characters from 3 of the following: - Upper Case Letters - Lower Case Letters - Numbers 0 - 9 - Special Characters ! % & @ # \$ ^ * . ? _ ~ A password must meet the minimum length requirement: - At least 8 characters long
--	---

Please note that there are multiple IPT login URL's. If your address bar says <http://www.runiptca.com/web/login.php>, or you do not see the AmeriCorps Utah logo, you have reached the Canada IPT system and your login credentials will not work. Always use <http://www.runipt.com>

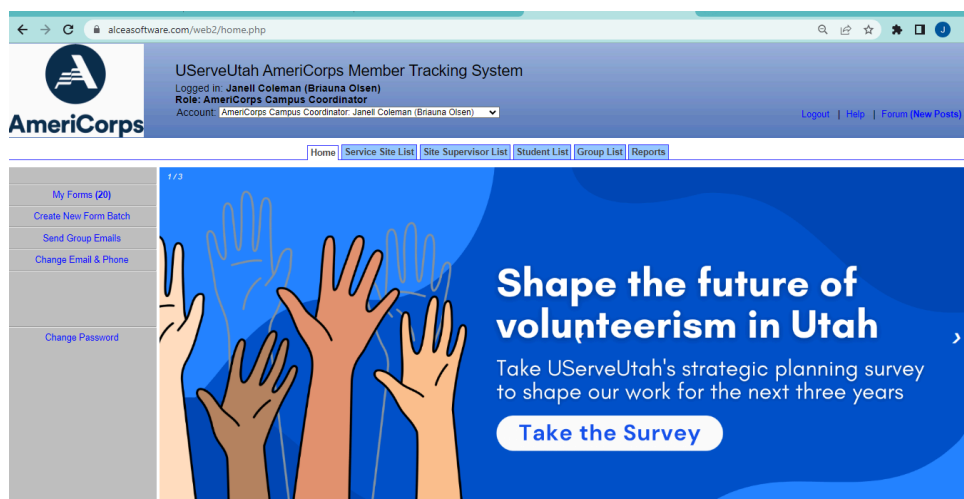
Expiring Passwords

Your password will expire every 60 days. You will receive a warning from IPT six days before your password is set to expire. Once it has expired, you will receive a warning in red text. Click the “forgot password” link and follow the steps. When you are prompted to change your password, you will need to input your current password.

Once you have logged in, you will see your home screen. The home screen contains all of the links and tabs you will need within the tracking system throughout your time with AmeriCorps. In the heading you will notice that your name and your Login role are listed on the left. On the right are the Logout button and a help button.



Across the top of the home screen, below the heading there are two tabs: Home and Site Supervisor Detail (see the site supervisor detail on the next page, to view tabs). **Home**, will bring you back to the home screen. **Site Supervisor Detail** will take you to your personal information and will show members assigned to you at the bottom under “Internship Assignments.” If any fields on this page are inaccurate, please contact your program director to make changes.



Home Screen Features

On the left side of the screen you will see seven options in the blue navigation bar: My Forms, View Form Batches, Create New Form Batch, Send Group Emails, Change Email & Phone, Edit Member Service Agreement and Change Password.

My Forms: List of all of the forms that have been assigned to you to complete.

View Form Batches: See all of the forms that you have ever assigned to members.

Create New Form Batch: Not in use by Campus Coordinators at this time.

Send Group Emails: Email a group of members, site supervisors or sites directly from the system.

Change Email & Phone: Change the contact information that we have in the system for you.

Edit Member Service Agreement: Make edits to the portions of the Member Service Agreement that are program specific.

Change Password: Create a new password. If you believe your password has been compromised you should change it immediately.

Service Sites and Supervisor Detail Pages

The service sites list includes all past and current sites connected to your program. Additional information pertaining to the site will be included here.

The Site Supervisors list will include all past and current Site Supervisors connected to your program and the service sites.

Site Supervisor Detail Pages

Home | Site Supervisor Detail

Home > Form List > Site Supervisor Detail
[Upload Picture](#) | [Forms](#)

Site Supervisor Detail: Supervisor Training

[Save](#)

Last Name: Phone:

First Name: Fax:

Street Address: Title:

City, State Zip:

Email: ☒

☐ Nonprofit

☐ Government Agency/School

Service Site:

[Attach AmeriCorps Site Supervisor Agreement](#)

Internship Assignments				
	Semester	Student Name	Phone Number	Student Group
view	Quarter 1	Person,Amanda	801-555-0000	Test Group
view	Quarter 1	System,Sally		Test Group
view	Quarter 1	Training,Member		Test Group

The site supervisor detail will probably look something like this. Many of the fields will be left blank. It is the responsibility of the supervisor to input the information requested in each field. There is an option at the top left to upload a picture. Anyone can upload a picture but some programs may require a picture.

Other Tabs

- **Student List:** A list of all of the members within your program and allow you to access the member detail.
- **Group List:** A list of all of the groups within your program. Groups are how we identify which members belong to a certain time frame in their AmeriCorps service. For example, you may call one of your groups “2012-13 Enrollments for Program X.”
- **Reports:** Run reports on your program.

Student Detail Page

Across the top of the member detail there are several links to pages associated with these members file. Each has a specific purpose and function within the system.

PREV: This will take you to the previous member in the alphabetized list of members.

NEXT: This will take you to the next member in the alphabetized list of members.

Custom Fields: This will take you to a separate page where more documents can be uploaded to a member file. The program director for each program may determine how these fields are utilized unless otherwise directed by the state program manager.

Forms: This allows you to view all of the forms for a specific member. More information on this page is described in the section of this user guide titled Forms.

Select Picture: This feature should not be used.

Upload Picture: The option to upload a picture of the members is available. The program will determine if this is a requirement. The picture should be a portrait type image of the member. To upload a picture, click on the link. You will see a dialogue box which reads:



Select picture to upload for: YOUR NAME

Using the browse button, you will be able to locate an image on your computer to upload to your detail. Once you have selected the image, select upload file. To change the image, click on the link again and select Delete Current Picture.

Dashboard: This is a quick place to view an individual member's progress towards completion of their hours within the system. More information on this page is described in the section of this user guide titled Dashboard.

Progress: This is a quick place to view an individual member's progress towards collecting demographic data and great stories. More information on this page is described in the section of this user guide titled Progress.

Contact Log: At the bottom of the member detail, you can track any contacts that you make with the member. Select "Add New Entry" to enter new detail. A narrative field opens up where you can add new any information that needs to be documented about your

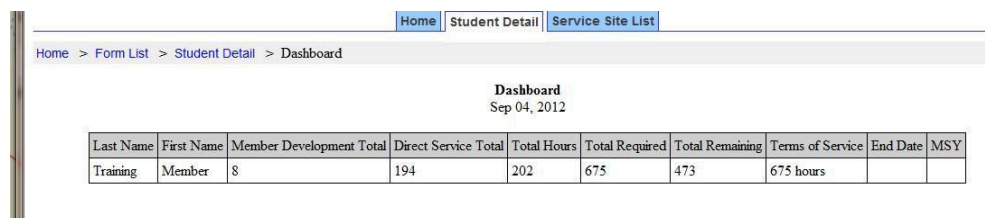


with the member. Select "Add New Entry" to enter new detail. A narrative field opens up where you

can add new any information that needs to be documented about your interactions with a member, site supervisor or site. Only the commission, the program director and the member can view these entries. These entries are time and date stamped, so it is the best way to track contact with members.

Dashboard

The dashboard is a feature of IPT which allows a member to track their progress in the system for completing their AmeriCorps term.

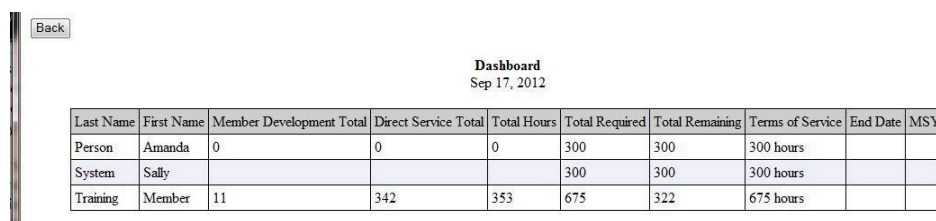


Last Name	First Name	Member Development Total	Direct Service Total	Total Hours	Total Required	Total Remaining	Terms of Service	End Date	MSY
Training	Member	8	194	202	675	473	675 hours		

Hours recorded in the dashboard reflect all hours entered into the system and may include hours that have not yet been approved. Please verify that service hour records have all been signed and approved in order to get the most accurate reflection of their service on this dashboard.

Completion of an AmeriCorps term requires that time and attendance record keeping be conducted by the individual who supervises the AmeriCorps member. This time and attendance record is used to document member eligibility for in-service and post-service benefits. Time and attendance records must be signed and dated both by the member and by an approved individual with oversight responsibilities for the member.

A program director has access to view all dashboards under their survey all at once. By selecting Reports and then Dashboard, a program director can select which program they wish to view and then select run report. A dashboard containing all of the member data entered to date is viewable in this format.



Last Name	First Name	Member Development Total	Direct Service Total	Total Hours	Total Required	Total Remaining	Terms of Service	End Date	MSY
Person	Amanda	0	0	0	300	300	300 hours		
System	Sally				300	300	300 hours		
Training	Member	11	342	353	675	322	675 hours		

Remember that hours recorded in the dashboard reflect all hours entered into the system and may include hours that have not yet been approved. Please verify that service hour records have all been signed and approved in order to get the most accurate reflection of a member's service on this dashboard.

There are three other options at the top of the detail page: Forms, Dashboard and Progress.

Forms

This link will take you to the same place as the My Forms button on the home screen. There will be a list of all of the forms that have been assigned to you. Each row is a separate form.

Home > Form List

Online Forms List For: Member Training

☐ Hide Completed Forms

	[Template]	Batch Name	Form ID	Status	Signed	Waiting For	Schedule Date	Due Date
View	Service Hour Record	Test	✕ Training_Member	new **		Student	2012-08-06	
View	Service Hour Record	TEST FORM	✕ Training_Member	new **		Student	2012-08-20	
View	Member Service Agreement	test	✕ Training_Member	new		AmeriCorps Program Director	2012-08-06	
View	Member Service Agreement	Trial Contract	✕ Training_Member	new		AmeriCorps Program Director	2012-08-09	
View	Member Service Agreement	trial form	✕ Training_Member	new		AmeriCorps Program Director	2012-08-21	
View	Service Hour Record	July2012	✕ Training_Member	complete	12-		2012-07-26	2012-08-05

Each column designates a different part of the form.

Template identifies which form type was assigned.

Batch Name indicates information that the program director wants you to know about the form. **Form ID** indicates who the form belongs to.

Status describes whether the form is new, active, waiting for re-sign, or complete.

Signed designates who has signed the form. A “1” means that the first person required to sign the form has signed it, this is usually the member. A “2” means that the second person required to sign the form has signed it. This is usually the site supervisor. Some programs may require more than two signatures; if this is the case for your program there will be space for additional signatures.

The **Waiting For** column indicates who needs to complete the form next.

The **Schedule Date** is the date that the form was sent out and the **Due Date** indicates the date the form is due.

By selecting **View** next to any of the forms, you can view and/or complete the forms that are required by your program.

Once all required signatures are on a form and you no longer wish to see it in your list, you can select the box “Hide Completed Forms” at the top of your forms list. This will not erase your forms, it will simply make it easier to see only the forms that still require signatures. You may also sort your forms list by any of the columns whose headings are in blue.

UServeUtah AmeriCorps Member Tracking System

Logged in: Supervisor Training
AmeriCorps Site Supervisor

[Logout](#) | [Help](#)

[Home](#) | [Site Supervisor Detail](#)

Home > Form List
[Add New Form](#)

Online Forms List For: Supervisor Training

☒ Hide Completed Forms

	[Template]	Batch Name	Form ID	Status	Signed	Waiting For	Schedule Date	Due Date
View	Weekly Service Hour Record - Dates	Commission Test Aug 31 to Sept 4 (Oct 12, 2015)	☒ Training_Member	active **	----	Supervisor	2015-09-01	2015-09-07
View	Enrollment Eligibility Verification	Enrollment Form	☒ Being_Human	new		Student	2012-09-20	
View	Weekly Service Hour Record - Dates	UServeUtah Test Batch July 20 (Jul 18, 2016)	☒ Member, Jamie	new		Student	2016-07-20	

Interns Placement Tracking (c) 2000 - 2015 by Alcea Software LLC ID: 302 082256

Select the View link to the left of the form. Look over each date on the form and check it for accuracy. Do not approve any service hour records that are not complete with all required fields entered. This form is a federal form and is subject to regulations regarding fraud. If the member has filed any time for which you cannot verify, you should indicate the discrepancies in the box at the bottom of the service hour record and then clear the member signature.

If you do not approve the members time, they will receive an email that will indicate that their service hour record signature has been cleared. They will need to return to that form in IPT to review the reason that you, as site supervisor did not approve the service hour record at the bottom of the form. The member can then make the corrections to the form and re-sign it.

Another email will then be sent to you to approve the member's service hour record.

When you are ready to approve the service hour record, you will select "Click to sign completed document".

29	Teaching		5		5
30	Teaching		3		3
31	Teaching		2		2
	Totals		143		143

SAVE WORK

Member Electronic Signature: (Training Member): [Training Member](#) Sep 17, 2012 12:23 PM

Supervisor Electronic Signature: (Training, #2 Supervisor): [Click to sign Completed Document](#)

Office Reviewer Signature: (Test Program Director):

Clear Student Signature [Clear](#)

Supervisor - reason signature was cleared:

Note: You must click on the SAVE button to save any information entered or changed on this page before closing or printing the page, or your information will be lost.

CLOSE

SAVE

This will pull up a dialogue box where you will enter your full name and select submit signature.

Day	SAVE WORK	Description of Days Activities	Member Development	Direct Services	Fund Raising	Total
25						

Sign this document by entering your name in the box below. Once you have signed here you will no longer be able to change fields in document.

[SUBMIT SIGNATURE](#) [CANCEL](#)

26						
----	--	--	--	--	--	--

Appendix B: Running Reports

IPT has many features that allow you to run reports on your members' progress. This guide will assist you in learning about how to run a variety of reports.

Types of reports you may want to run:

Dashboard of Hours

Form Status

Progress and Demographic Reporting

Member Record Data

Dashboard of Hours 🕒 To review for a single member

Login > Student List > Select member > Select Forms > Dashboard > Review

Member Totals ****Note****Verify that all forms that have been started are completed (forms that are active, but have not been approved will still be included in the dashboard total)

To review for all active members in your group

Login > Reports > Dashboard > Select Group > Generate Report. Review Member Totals

****Note****Verify that all forms that have been started are completed (forms that are active, but have not been approved will still be included in the dashboard total)

Progress and Demographic Reporting

To review for a single member

Login > Student List > Select member > Progress > Review Member Totals

To review for all active members in your group

Login > Reports > Progress > Select your group and the date range for the reporting period > Review Member Totals

****Note****If you are needing data from January 1- March 31, but you scheduled the form batch in December, you will need to use the date that the form was scheduled, not January 1. This is why it is important to not schedule this form in advance.

Form Status

Login > View Form Batches > Find the form you need a report on > select the tools on the right-hand side of the row > Select List > Sort by Status > Review the list of names and who has yet to complete the form

Member Record Data

Login > Reports > Student Custom Export > Select from Available fields on the right.

Fields will be moved to the box on the left > Run > Select Group to include in report > Export Data > Open or Save Report

Appendix C: NSOPW Check Coordinator Guide

How to Create a Digital Signature in Adobe Acrobat

Please watch this YouTube video to learn how to create a digital password:

<https://www.youtube.com/watch?v=nFm64iysUrQ>

Please be sure to set up a password for your signature. We would also suggest saving your signature in a file on your computer where you can easily find it in case you switch computers during your employment at your institution.

Process on NSOPW.GOV

1. Go to website: www.nsopw.gov and run a “Quick Search” on member’s name. View member’s Enrollment and Eligibility Form to ensure that you run their full name (married and maiden), if you are aware of any aliases the member goes by, run that name as well.
2. Ensure all jurisdictions have been reported after running the check.
3. Click on “Print View”.
4. Right click and then select “Print” DO NOT PRINT.
5. You will click on “change” and then save the document as a PDF.

Process in Adobe:

6. Once file is saved to your computer, open the file in Adobe Acrobat Pro.
7. Click on “tools”, “content”, “add or edit text box”, then click on the PDF where you want to add the text.
8. Copy and paste the text below on the first page if there is room. You can also paste it on the last page of the NSOPW check if you have multiple pages (text does not have to be in red):

The results of this check were reviewed and used in determining eligibility for an AmeriCorps position. This criminal history check was performed in accordance with the Serve America Act to determine eligibility for service in an AmeriCorps program. Any further dissemination or use of this check is prohibited by state statute 53-10-108.

9. If the name(s) you run pull up results, you must review all results and ensure your member is not listed on the check. You must also include a text on the PDF similar to this (text does not have to be in red):

I have reviewed this NSOPW check in its entirety and verify that this member is not listed on this check because: (proceed to list how you know it’s not the member) the names do not match member’s name, birthdates do not match member’s birthdate, (etc).

10. If the name you run have no results, you must include this text on the PDF:

Reviewed by:

11. After all text has been entered, click on “sign & certify”, click on “sign document1”, and then click on the PDF where you want to sign and enter in password for your signature then click to sign. A “save as” window will open up and you will save your document. Your signature will then show up next to a time and date stamp. Time and date stamp is required!

Upload the NSOPW Checks into IPT with current name in under the NSOPW file upload and any additional names under supplemental documents.

If the “sign document” button is not highlighted and if it will not allow you to select the option, right click anywhere on the PDF and click on “hand tool”. The option to sign the document will then be available for you to select.

Appendix D: Resource Sheet: How to Use the Education Award

Ways to use the Education Award

1. Repay qualified student loans

- Loans backed by the federal government under Title IV of the Higher Education Act (except PLUS Loans to parents of students)
- Loans under Titles VII or VIII of the Public Service Health Act
- Loans made by a state agency, including state institutions of higher education

2. Pay current educational expenses at a qualified school

- May include tuition, fees, books, transportation, or other educational necessities
- Eligible schools are higher educational institutions, both domestic and foreign, that currently participate in the Department of Education's Title IV student aid programs, referred to as "Title IV schools."

3. Transfer the award

(If you are 55 years of age and older) May transfer to ONE child or grandchild per award

Non-traditional Uses of the Ed Award

The AmeriCorps education award was designed primarily to help pay for school tuition and/or repay qualified student loans. But it can also be used in nontraditional ways. Here are some you may not be aware of:

1. Other types of schools—generally, you can use the education award to go to any school that offers federal student aid (such as Stafford loans). These schools are known through the Department of Education as Title IV. If you would like to go to massage school, culinary school or a trade school, you can use the ed award as long as they are listed as Title IV and offer federal student aid. Sometimes, there will be two massage schools in a town and one of them will be listed as Title IV while the other is not. It might take some research to find the school that will accept your education award. For example, there's a school in Wyoming called the National Outdoor Leadership School (NOLS) that isn't listed as Title IV, but accepts the ed award. You can learn more about it at www.nols.edu/

2. Going to school overseas—A number of schools in Canada, Mexico, and Europe are listed as Title IV. In other words, American students can receive U.S. financial aid to attend. At these schools, you can use your education award to pay for tuition. To find out whether an institution is Title IV, you can look up schools at www.fafsa.ed.gov/fotw0405/fslookup.htm or call the Federal Student Aid Information Center at 1-800-433-3243. If a school is NOT listed as

Title IV but you would still like to attend while using your education award, you might be able to enroll in a school stateside and participate in an exchange program. That way, you are paying your tuition to a school inside the U.S. (The Evergreen State College, for example) while attending a school overseas (University of Vienna, for example). To make this option work, it will take a bit of effort on your part to find a program that will allow you to do this and to make it work.

3. Non-degree programs—You can also use your ed award to take a class here and there at a community college or public university. You can take classes like guitar, swimming, or photography. If you take one or two classes per quarter at a community college, you can make your ed award last for years and get a great deal of enrichment.

The Education Award is taxable!

- The tax year in which students use the award, it counts as taxable income.
- Report the income as “educational benefit” income rather than self-employment income to avoid a higher tax rate
- If students are dependent on someone else’s taxes, they should make sure to share this info with them so that it can be reported correctly.
- A 1099 MISC income form from the IRS for any amount over \$600 that students used from the education award in that tax year.
- Tax forms are accessed on My.AmeriCorps.gov, it will not be mailed.

AmeriCorps Education Award and Federal Student Aid

Neither the education award nor the living allowance you have received as an AmeriCorps member count towards a member’s expected family contribution (EFC) on the FAFSA.

The Education Award needs to be reported correctly on the FAFSA so that students do not accidentally miss out on Federal Financial Aid on question 43D.

Payment of the Education Award

By law, education award payments for current educational expenses must be made “in 2 or more installments”, none of which exceeds 50% of the amount of the payment. The interval between installments may not be less than one half of the period of enrollment, except as necessary to permit the second installment to be paid at the beginning of the semester, quarter, or similar period of enrollment.

CNCS makes two installments, one at the beginning of the enrollment period upon which the amount is based and the second at the middle of the enrollment

period. When the school approves the payment request, it indicates both the beginning date of the enrollment period and the midpoint date. If the midpoint date has already passed when the Trust receives the approved payment request, the entire amount requested/approved is paid. Payments are generally sent out by the U.S. Treasury every Friday.

Limit of Education Award

Members cannot receive more than the aggregate of 2 full time education awards even if they serve in different streams of National Service and even if you serve more than 2 fulltime terms of AmeriCorps.

Additional Resources:

My.AmeriCorps.gov portal: <https://my.americorps.gov/mp/login.do>

Step by step instructions by video that show you how to submit your request through MyAmeriCorps.Gov: <https://youtu.be/AeXPB2Cd69U>

Official AmeriCorps Education Award Web site:
<http://www.nationalservice.gov/programs/americorps/segal-americorps-education-award>

This Corporation-based Web site includes vital information on issues like loan forbearance, the effect of the education award on taxes, and how the award applies to financial aid. The information is dense but extremely useful, and your members can benefit from browsing the site and finding the information that applies to their individual situations.

Segal AmeriCorps Education Award

For information on your Segal AmeriCorps Education Award, contact the National Service Hotline at 1- 800-942-2677 or via web form at <https://questions.nationalservice.gov> . - including payments to your educational institution, loan deferments, password issues, and general questions about your Segal AmeriCorps Education Award.

AmeriCorps Alums/National AmeriCorps Association Education Center
<http://www.americorpsalums.org/>

AmeriCorps Alums is a community of engaged citizens and civic leaders that gets things done for America. It is the only national network that connects the nearly one million alumni of all AmeriCorps programs who have served since 1994 (including an estimated 75,000 new alumni each year) to the people, ideas, and resources that support their commitment to a lifetime of service.

Letter for your Financial Aid Counselor if they need an explanation of the AmeriCorps benefits and how they are treated on the FAFSA:

Register with Service Year to get Tax Assistance help: <https://serviceyear.org/>

The award can be used at any Title IV institution you can view a list here:
<https://fsapartners.ed.gov/knowledge-center/library/resource-type/Federal%20School%20Code%20Lists>

Appendix E: Sample Letter to a College Financial Aid Officer

Dear Financial Aid Officer:

We are providing this information to assist you in understanding the relationships between AmeriCorps and FAFSA.

An AmeriCorps member receives three types of benefits that are relevant to completing the FAFSA:

- **Living Allowance:** AmeriCorps members may receive a living allowance to cover living expenses during their term of service.
- **Segal AmeriCorps Education Award:** After successfully completing a term of service, AmeriCorps members who are enrolled in the National Service Trust are eligible to receive an education award. The education award can be used to pay education costs at qualified institutions of higher education or training, or to repay qualified student loans. Members can use any portion of their education award and a member has up to seven years after his or her term of service has ended to claim the award.
- **Payment of interest on loans:** The Corporation for National and Community Service pays interest on postponed qualified student loans for AmeriCorps members who successfully complete their term of service.

The member may also be earning Federal Work-Study wages for serving in an AmeriCorps project. All of these benefits should be included on the "income exclusion worksheet" of the FAFSA.

With respect to the education award and interest payment, the IRS has determined that these payments are subject to income taxes in the calendar years in which the payments are made. That taxable amount is reported on a 1099 form.

When the student files a FAFSA for the following year, the amount of the Segal AmeriCorps Education Award paid in the base year and included in that year's AGI, is to be excluded from the need analysis calculation. In most cases, the entire education award amount that was paid is taxable, so the entire amount that was paid is included in the AGI.

Thus, the filer is to report the entire amount that was paid, not just the amount in excess of tuition, fees, books, and supplies. When students use their education awards as a resource, it may reduce their eligibility for campus-based aid.

Financial aid offices must consider the Segal AmeriCorps Education Award as a resource, or funds that you have available toward your cost of attendance, when considering your eligibility for campus-based aid. This includes the Federal Supplemental Educational Opportunity Grant (SEOG), the Federal Work-Study Program, and Perkins Loans. (See 34 C.F.R. § 673.5(c).)

AmeriCorps VISTA members have some additional benefits. Whether they have elected the education award or the stipend, AmeriCorps VISTA members may be eligible for other types of loan postponements. Those who choose the stipend are also uniquely eligible for partial cancellation of Perkins Loans.