



## **Enrolling in a Supervisor Orientation Using eGrants**

### **This set of instructions explains how to:**

- Obtain the necessary user roles for enrolling in a VISTA Supervisor Orientation.
- Access and complete the Trainee Profile.
- Enroll in a VISTA Supervisor Orientation.

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## Conditions for Enrollment:

Before you can enroll yourself in a VISTA Supervisor Orientation, make sure that the following are in place:

1. Your VISTA project must be fully awarded and a Memorandum of Agreement (MA) signed and on file with your Corporation State Office.
2. You must have an eGrants account with your own username and password.
3. You must have the “Grantee Travel Profile” eGrants role **and** at least one of the following roles:
  - a. “Grantee without access to budget”
  - b. “Grantee Admin”
  - c. “VISTA Grantee Member Management”

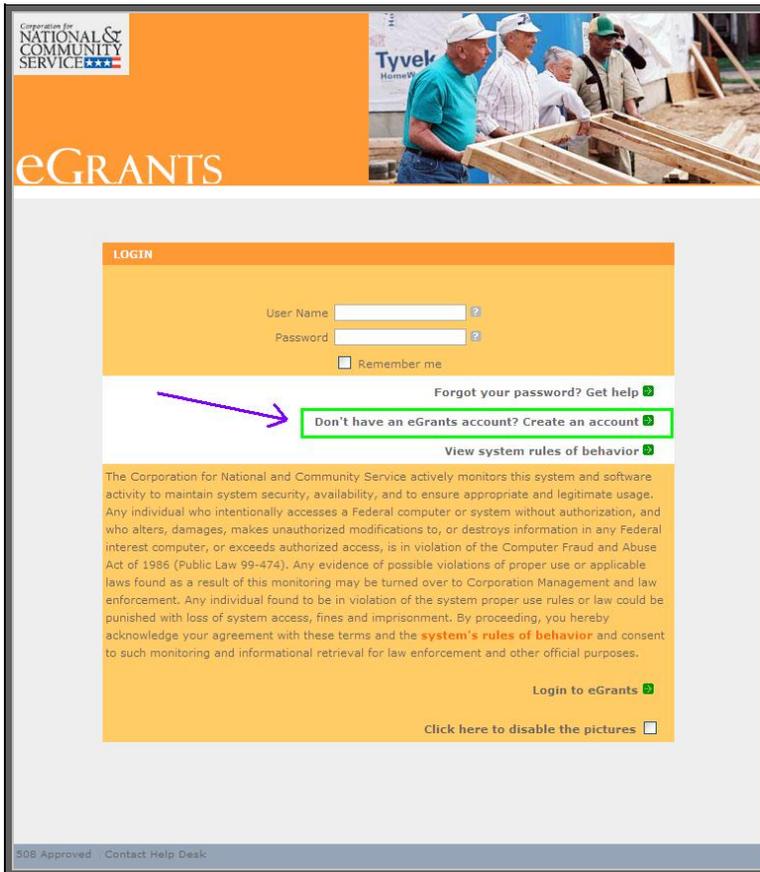
## Step 1 – Creating an eGrants Account

To enroll in the Supervisor Orientation, you must have your own individual eGrants account. For data integrity, security, and reimbursement purposes, you should not use anyone else’s eGrants account to enroll in the Orientation.

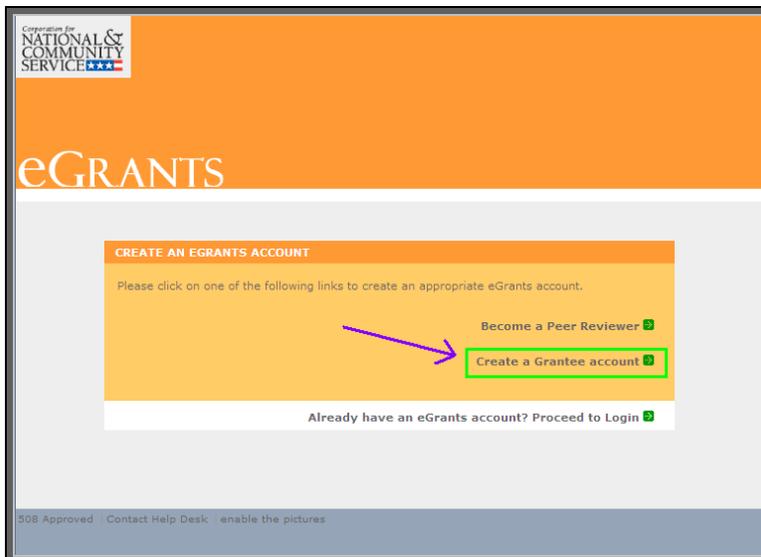
*If you already have an eGrants account with your own username and password, proceed to Step 2.*

You will need your organization’s Employer Identification Number (EIN) for this step.

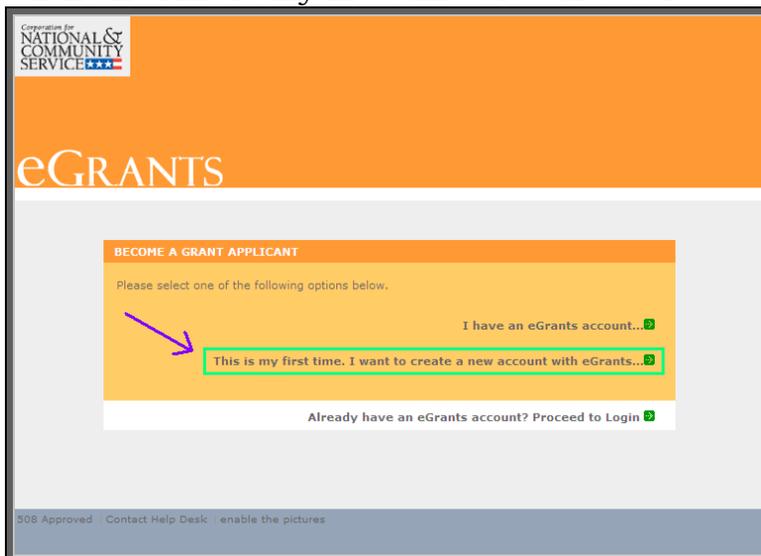
1. Go to the eGrants website: <https://egrants.cns.gov/espan/main/login.jsp>
2. Click on “Don’t have an eGrants account? Create an account.”



3. Click on “Create a Grantee account.”



4. Click on “This is my first time. I want to create a new account with eGrants...”



5. Enter your name as it appears on your government-issued identification. Fill in the remaining required fields and click “next.” Continue filling in information on the additional pages until the account is created.
6. Once complete, your Grantee Administrator will be able to log into his/her eGrants account to grant you the necessary user roles.

## Step 2 – Obtaining Roles in eGrants

To enroll in the Supervisor Orientation you must have the eGrants “**Grantee Travel Profile**” role.

*If your Grantee Administrator will enroll you in the Supervisor Orientation, this is the only role you need. You may skip to Step 3 to complete your Travel Profile and then have your Administrator complete your enrollment.*

In addition to the “Grantee Travel Profile” role, you must also have one of the following roles:

- a. “Grantee without access to budget”
- b. “Grantee Admin”
- c. “VISTA Grantee Member Management”

*If you already have the appropriate roles, proceed to Step 3.*

### To Be Granted Roles:

1. Contact your eGrants Grantee Administrator.
2. Your eGrants Grantee Administrator needs to:
  - a. Log into his/her eGrants account.
  - b. Click on “My Account” at the bottom of the page.

The screenshot displays the eGrants user interface. At the top left is the logo for the Corporation for National & Community Service. The main header area contains the text "eGRANTS" and a photograph of three people (two men and one woman) looking at a document. Below the header, the page is divided into several sections. On the left, there is a "Welcome Debra" message. On the right, there is a "VIEW MY GRANTS/APPLICATIONS" section with a list of items: View All, 3 Awarded, 15 Closed, 1 Concept Papers, 1 Grantee edit of application or report, 2 Subapplicant edit of application, 1 Subapplication being reviewed by prime, 1 Subapplication rejected by prime, and 2 Under CNCS review. Below this is a "VIEW MY AMERICORPS PORTAL" section with a link to Portal Home. At the bottom of the page, there are three main navigation columns: "Creating an Application" (with links for New, Continuation/Renewal, Amendment, and Concept Paper), "Managing My Account" (with a note to click on links for common account functions and a link for "My Account" highlighted with a green box and a purple arrow), and "Reporting to CNCS" (with links for Financial Report, Progress Report, and Progress Report Supplement). The footer contains the text "508 Approved Contact Help Desk disable the pictures".

c. Click on “Edit User Role/Permissions” in the upper right-hand quadrant.

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# eGRANTS

Welcome Debra

### Grantee Info

Debra  
Non-profit Organization  
123 Service Lane  
Washington, DC 20525  
Status: Grantee

### MY ACCOUNT

#### Update My Login Info...

You can change the following information by clicking on the links below:

- Change My Password
- Change My Password Q&A
- Change My Email Address
- View All

#### Edit My Organization Info...

You can change the following information by clicking on the links below:

- Update Organization's Contact Information
- Update Organization's Attributes
- Edit User Role/Permissions**
- View All
- Change My Primary User Role

#### Update My Profile...

You can change the following information by clicking on the links below:

- View All
- eGrants Feedback

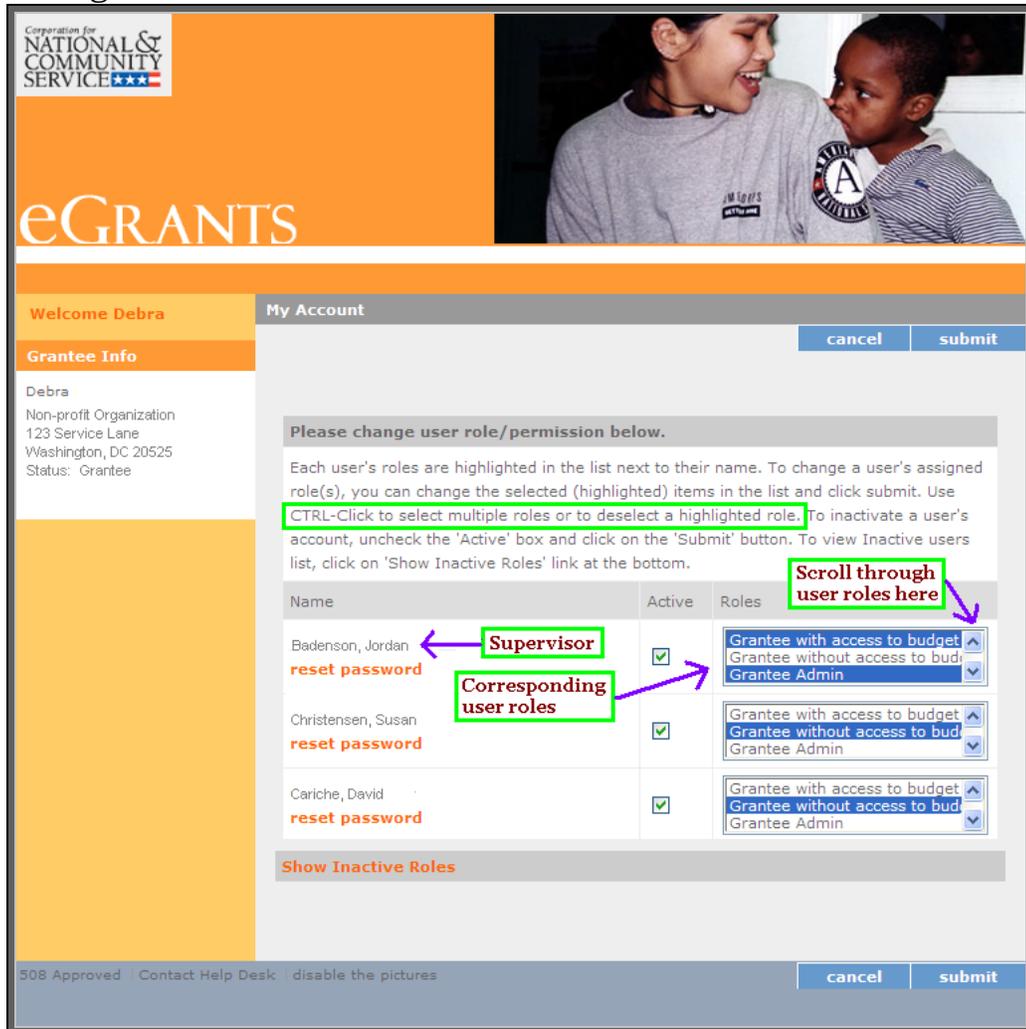
#### Update My Contact Info...

You can change the following information by clicking on the links below:

- View All

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- d. Locate the Supervisor name and the associated user role/permissions to the right of the name.



- e. Scroll to the bottom of the user role/permission list and, while holding down the “CTRL” button, highlight the “Grantee Travel Profile” user role and at least one of the above user roles (in addition to any other approved user roles).
- f. Click “Submit.”
3. Once your eGrants Grantee Administrator has granted your roles, you should then log back into your eGrants account and start with Step 3.

### Functions of Each User Role:

- Grantee without access to budget
  - Search Potential Applicants; Search Submitted Applications; Manage Members; Invite Members; Manage Events; Manage Programs; Manage Service Locations; Manage Users; Recruitment Workbasket; S&N Workbasket; S&N Reports; VISTA Workbasket; Sponsor Verification
- Grantee Admin
  - Search Potential Applicants; Search Submitted Applications; Manage Members; Invite Members; Manage Events; Manage Programs; Manage Service Locations; Manage Users; Recruitment Workbasket; S&N Workbasket; S&N Reports; VISTA Workbasket; Sponsor Verification
- VISTA Grantee Member Management
  - Manage Members; Manage Events; VISTA Workbasket

## Step 3 – Enrolling in a VISTA Supervisor Orientation

4/6/2010, 9:42 AM, EDT

home my account help logout

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# eGRANTS

**eGRANTS MESSAGES**

Welcome

**To complete the Supervisor Trainee Registration Profile and enroll in a Supervisor (SUP) Orientation, log into eGrants. Then, click on "Portal Home."**

**VIEW MY GRANTS/APPLICATIONS**

- View All
- 4 Awarded
- 11 Closed
- 2 Subapplicant edit of application
- 1 Subapplication being reviewed by prime
- 1 Subapplication rejected by prime
- 2 Under CNCS review

**VIEW MY AMERICORPS PORTAL**

- Portal Home

Creating an Application	Managing My Account	Reporting to CNCS
<p style="text-align: right;">New ➤</p> <p style="text-align: right;">Continuation/Renewal ➤</p> <p style="text-align: right;">Amendment ➤</p> <p style="text-align: right;">Concept Paper ➤</p>	<p>Click on the links below to access common account functions.</p> <p style="text-align: right;">My Account ➤</p> <p style="text-align: right;">Equal Opportunity Survey ➤</p>	<p style="text-align: right;">Financial Report ➤</p> <p style="text-align: right;">Progress Report ➤</p> <p style="text-align: right;">Progress Report Supplement ➤</p>

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## Step 4 – Completing Your Trainee Profile

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# eGRANTS

Welcome Timothy

Portal Home

- Trainee Profile
- Search Potential Applicants
- Search Submitted Applications
- Manage Members
- Invite Members
- Manage Events
- Manage Programs
- Manage Service Locations
- Manage Users
- Recruitment Workbasket
- S&N Workbasket
- S&N Reports
- VISTA Workbasket
- VISTA Reports

### Edit Trainee Registration Profile

#### Trainee Registration Profile

\* Date of Birth:  (mm/dd/yyyy)

\* Preferred Mode of Transportation:

\* Departure City:

\* Departure State:

\* Departure Zip Code:

Closest Airport:

Closest Train Station:

Check all the following that apply to you :

- Need Spanish Translation
- Vegetarian
- Smoker

Emergency Contact Name:

Emergency Contact Phone:

Special Needs:

Comments:

\* Street Address 1 (home preferred):

Street Address 2:

\* City:

\* State:

\* Zipcode:  -

\* Phone:

\* SSN:

\* Direct Deposit?: yes  no

Bank Account Number:

Account Type:

Routing Number:

cancel save

**a) Click on "Trainee Profile" link.**  
**b) Fill in the fields below, accurately and completely.**  
**c) Click "Save" at the bottom of the page.**

**Choose the closest major (not regional) airport or train station.**

**Direct Deposit is the quickest method of reimbursement. The site is secure, meeting the strictest federal & industry standards.**

**All Routing Numbers are nine (9) digits.**

## Step 5 – Enrolling in the Event

4/6/2010, 09:44 AM, EDT

home my account help logoff

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SERVICE

# eGRANTS

Welcome Timothy

Search Events

Portal Home

- Trainee Profile
- Search Potential Applicants
- Search Submitted Applications
- Manage Members
- Invite Members
- Manage Events**
- Manage Programs
- Manage Service Locations
- Manage Users
- Recruitment Workbasket
- S&N Workbasket
- S&N Reports
- VISTA Workbasket
- VISTA Reports

**Event Search Attributes**

Please select one or more criteria below to search for CNCS-sponsored training events.  
[Click here for help.](#)

Event Name:

Event Code:

City:

State:

Start Date:   (mm/dd/yyyy)

End Date:   (mm/dd/yyyy)

Type:

**To enroll in a Supervisor (SUP) Orientation, click on the "Manage Events" link on the left.**

**You will then see these fields appear.**

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## Step 6 – Searching by State & Type

4/6/2010, 09:44 AM, EDT home my account help logout

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COMMUNITY  
SERVICE**

# eGRANTS

Welcome Timothy

Portal Home

- Trainee Profile
- Search Potential Applicants
- Search Submitted Applications
- Manage Members
- Invite Members
- Manage Events
- Manage Programs
- Manage Service Locations
- Manage Users
- Recruitment Workbasket
- S&N Workbasket
- S&N Reports
- VISTA Workbasket
- VISTA Reports

### Search Events

#### Event Search Attributes

Please select one or more criteria below to search for CNCS-sponsored training events.  
[Click here for help.](#)

Event Name:

Event Code:

City:

State: DISTRICT OF COLUMBIA

Start Date:   (mm/dd/yyyy)

End Date:   (mm/dd/yyyy)

Type: SUP

IST  
SUP

**Type in any information you know about the event. It may be easiest to search by the state in which the event will be held.**

**Next, select "SUP" as the type of event from the drop-down menu.**

**Then, click "Search."**

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## Step 7 – Verifying the Event

4/6/2010, 09:45 AM, EDT

home my account help logoff

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**If there are multiple events that match your search criteria, all the events will appear. Once you have selected the appropriate event, you will see this screen with specific event information. Alternatively, if the correct event does not appear, you may go back to the previous step and enter more search criteria, which you may obtain from the Corporation State Office.**

eGRANTS

Welcome Timothy

Portal Home

- Trainee Profile
- Search Potential Applicants
- Search Submitted Applications
- Manage Members
- Invite Members
- Manage Events
- Manage Programs
- Manage Service Locations
- Manage Users
- Recruitment Workbasket
- S&N Workbasket
- S&N Reports
- VISTA Workbasket
- VISTA Reports

View Event

**Event Information**

If you wish to enroll member(s) and/or project supervisor(s) in this training event, or modify your current enrollments for this event, please click "enroll" below.

General Information			
Name	Blueberry	Location	CNCS
Code	SUP-07/13/2010- Washington-DC		Washington, DC
Type	SUP	Contact Phone	202-606-5000
Start Date	07/13/2010	Contact Name	Ericc
End Date	07/16/2010	Available Event Slots	21

Travel Information			
Arrive By	07/13/2010 04:00 PM	Preferred Airport	Reagan (DCA)
Depart After	07/16/2010 03:00 PM	Preferred Rail Station	Union Station (WAS)
Voucher Expiration	08/23/2010	Travel Subsistence	55
Travel Instructions	Please take the train.		

**Event Financials**

Travel Order Number	10SUPTEST1
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**Comments and Instructions**

This is a TEST event and not correlated to an actual event.

**To enroll in the event, click "Enroll" below.**

cancel enroll

## Step 8 – Selecting Supervisor(s) to Enroll

The screenshot shows the 'eGRANTS' interface. On the left is a navigation menu with 'Welcome Timothy' and 'Portal Home' sections. The main content area is titled 'Enroll in Event' and contains event details, a selection of attendee types, and a list of supervisors. Three callout boxes provide instructions: a green box points to the 'Individual' radio button; a pink box points to the 'Supervisors' list where 'Timothy Marble' is highlighted; and another green box points to the 'enroll' button.

**Enroll in Event**

If you wish to enroll member(s) and/or project supervisor(s) in this training event, or modify your current enrollments for this event, please click "enroll" below.

**Event Information**

<b>Name</b>	Blueberry	<b>Location</b>	CNCS
<b>Code</b>	SUP-07/13/2010-Washington-DC		Washington, DC
<b>Type</b>	SUP	<b>Contact Phone</b>	202-606-5000
<b>Start Date</b>	07/13/2010	<b>Contact Name</b>	Ericc
<b>End Date</b>	07/16/2010	<b>Available Event Slots</b>	21

**Event Attendees**

Select the type of AmeriCorps Members or CNCS staff that will be attending this training

Project Team  Members  Supervisors

Individual

Supervisors

- Timothy Marble

Member

cancel enroll

**To enroll, only click the "Individual" bubble. Then click on your name to highlight it.**

**If your name does not appear in this box, please go back to Step 2 to have the "Grantee Travel Profile" user role granted before continuing.**

**Click "Enroll."**

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## Step 9 – Contact Your Corporation State Office

The screenshot shows the eGRANTS interface. At the top left, the logo 'eGRANTS' is displayed. Below it, a navigation menu includes 'Welcome Timothy', 'Portal Home', and 'Manage Events'. The 'View Event' section is active, showing a confirmation message: 'Attendees have been added to this event successfully.' A green box highlights a message: 'You will then see this message. Please contact your Corporation State Office to verify your enrollment.' A purple arrow points from this message to the confirmation message. Below the confirmation, there is a table of event information, including general information, travel information, and event financials. A green box highlights a message: 'You are finished. You do not need to click "Enroll" below unless you need to enroll another Supervisor.' At the bottom right, there are 'cancel' and 'enroll' buttons, with the 'enroll' button crossed out with a red X.

**You will then see this message. Please contact your Corporation State Office to verify your enrollment.**

Please note:  
Attendees have been added to this event successfully.

**Event Information**

If you wish to enroll member(s) and/or project supervisor(s) in this training event, or modify your current enrollments for this event, please click "enroll" below.

General Information			
Name	Blueberry	Location	CNCS
Code	SUP-07/13/2010-Washington-DC		Washington, DC
Type	SUP	Contact Phone	202-606-5000
Start Date	07/13/2010	Contact Name	Ericc
End Date	07/16/2010	Available Event Slots	21

Travel Information			
Arrive By	07/13/2010 04:00 PM	Preferred Airport	Reagan (DCA)
Depart After	07/16/2010 03:00 PM	Preferred Rail Station	Union Station (WAS)
Voucher Expiration	08/23/2010	Travel Subsistence	55
Travel Instructions	Please take the train.		

Event Financials	
Travel Order Number	10SUPTEST1

**Comments and Instructions**

This is a TEST event and not correlated to an actual event.

**You are finished. You do not need to click "Enroll" below unless you need to enroll another Supervisor.**

**Unless you are driving, VISTA will book your travel.  
You will receive a welcome packet via e-mail  
3-4 weeks prior to the orientation.  
Your travel itinerary will arrive one week prior.**

# Troubleshooting

## Initial Questions

- Is the VISTA program grant awarded and the Memorandum of Agreement (MA) signed and on file with the Corporation State Office?
- Do you have:
  - your own eGrants account with your own username and password?
  - the “Grantee Travel Profile” user role?
  - at least one of the following user roles?:
    - Grantee without access to budget
    - Grantee Admin
    - VISTA Grantee Member Management
- Did you follow the above instructions in order and see the same screens?

## Specific Scenarios

- When I log into eGrants, the “Portal Home” link is not present.
  - You have not been granted proper user roles. View the necessary user roles in Step 2. Contact your Grantee Administrator or the National Service Hotline.
- “Trainee Profile” link does not appear after I click on “Portal Home”
  - You do not have the “Grantee Travel Profile” user role. Contact your Grantee Administrator or the National Service Hotline.
- I logged into eGrants and clicked on “Portal Home” but I only had access to the Trainee Profile and could not enroll in the event.
  - You have not been given an additional user role (“Grantee without access to budget” / “Grantee Admin” / “VISTA Grantee Member Management”). Contact your Grantee Administrator.
- My name does not appear in the “Supervisors” box in Step 8.
  - You do not have the “Grantee Travel Profile” user role. Contact your Grantee Administrator or the National Service Hotline.
- When I attempt to enroll, I receive a message stating that there are no more available event slots. It will not let me enroll.
  - Contact your Corporation State Office and tell them that you are ready to enroll but the event is currently full.
- I enrolled, but was told that my name did not appear on the roster.
  - Did you enroll in the correct event in Steps 5-7?
  - Did you click on your name in Step 8 before enrolling?
- I enrolled, but was told that only my name and none of my travel information appeared.
  - Do you have your own eGrants account with your own user name and password?
  - Did you create and complete your Trainee Profile in Step 4?
  - Did you ever have another eGrants account? If so, you should call the National Service Hotline for them to look up your account(s) and enroll the correct one.

If unable to complete any of the above steps or if technical difficulties occur, please contact your Corporation State Office and then contact the National Service Hotline at 800-942-2677 or <http://www.nationalservice.gov/questions/app/ask>. Tell them that you are a VISTA Supervisor (Grantee) attempting to enroll in a VISTA Supervisor Orientation via eGrants (Grantee Portal). Tell them where you are having trouble.