



NEW YORK STATE OFFICE OF NATIONAL & COMMUNITY SERVICE

AMERICORPS PORTAL MEMBER SLOT CONVERSION & BUDGET MODIFICATION PROCESS

The New York State Office of National and Community Service Portal Policy and Procedure Document govern this section. The AmeriCorps Portal provides grantees of the New York State Commission on National & Community Service ("Commission") with increased control of member management and changes to program structure. To help programs remain compliant with all Corporation for National and Community Service ("Corporation") and Commission regulations, the New York Commission is implementing the following policies and procedures with respect to the functionality of the AmeriCorps Portal.

The AmeriCorps Portal does not serve as a compliance check for all grant requirements or policy. For example, it is possible that the system will allow programs to perform actions that are not compliant with grant requirements. Therefore it is important to stay apprised of and follow all requirements rather than rely on the system for compliance checks.

Member time records are not a function of the AmeriCorps Portal. All AmeriCorps State grantees must establish a member time management system outside of the AmeriCorps Portal and have this system approved by your State Commission Program Administrator. Upon review and approval of your member time management system, your State Commission Office Program Administrator will provide you with an approval letter to be retained in your files and a copy will also be on file at the State Commission. Quarterly member service hours must be aggregated using your approved member time management system into the Member Activity Report which must be included when submitting your Expenditure Reports/Claims in the Contract Management System (CMS).

Portal Actions That Do Not Require State Commission Office Prior Approval

Programs can make changes in Member Status, Slot Type, Terms of Service, Refilling Slots, Amending Member Start Dates, Completing Member Applications/Enrollment Forms, and Documenting Program Service Sites in the AmeriCorps Portal without prior approval from their Program Administrator. However, programs must notify their State Commission Office Program Administrator within five (5) business days of the change being made in the AmeriCorps Portal. The program may also need to submit an AmeriCorps Request for Revision/Amendment Form (*AmeriCorps Program Fiscal Manual: Attachment B*) and/or an AmeriCorps Member Slot Conversion & Budget Modification Form (*AmeriCorps Program Fiscal Manual: Attachment C*) as applicable. The program will be held responsible during monitoring or compliance visits and audits to verify that the program budget, member payroll, and/or member time record and/or contract reconcile to reflect the change(s).

1. *Changing Slot Types (unfilled positions)* - Programs may change the type of slots awarded to their program if:
 - (a) the change does not impact the total MSYs authorized in the program Grant Award (e.g. one half-time position cannot be changed to one full-time position);
 - (b) the change does not increase the amount of the education award;
 - (c) an AmeriCorps Member Slot Conversion & Budget Modification Form must be completed and forwarded to the State Commission Office **within** five (5) business days of the change being made in the AmeriCorps Portal. Programs may also need to complete the Budget Modification in CMS.

2. *Refilling Slots* - Eligible AmeriCorps State and National programs that have fully enrolled their awarded member slots are allowed to replace any member who terminates service before completing 30 percent of his/her term (effective May 17, 2007) provided that the member who terminates is not eligible for and does not receive a pro-rated education award. The slot being refilled must be equal to or lesser than the original slot. Programs may not refill the same slot more than once.
3. *Amending A Member Start Date* – Occasionally errors occur that require amending member start dates. The amended start date must match the start date in the member contract and the AmeriCorps Program staff must indicate that the member did not complete any hours or receive payment during the period between the original and amended start date. *(Note: Programs are not required to request approval for this action nor are programs required to notify the State Commission Office when a Member Start Date has been amended).*
4. *Completing Member Applications/Enrollment Forms* - Electronic AmeriCorps Member Applications are an acceptable form of record keeping, however if members are unable to sign electronically, a paper copy of all portions of the Member Application (including member sections) must be printed and kept on file with member's signature. *(Note: Programs are not required to request approval for this action nor are programs required to notify the State Commission Office when a Member Application/Enrollment Form has been completed).*
5. *Documenting Program Service Sites* - Within 90 days of the program start date, a spreadsheet of all program service sites including name of site, physical address, and number of members serving at each site must be completed and submitted to the State Office of National & Community Service. Updates to this form must be submitted to the State Commission Office Program Administrator within 30 days of the change. In addition to submitting the detailed site information to the State Commission, programs are still required to complete the Service Locations Section of the AmeriCorps Portal.

Portal Actions That Require Prior Approval from the State Commission Office

Certain functions require prior written approval from your State Commission Program Administrator before you make take the action in the AmeriCorps Portal. An AmeriCorps Member Slot Conversion & Budget Modification Form must be completed and forwarded to the State Commission for approval no less than five (5) business days **prior** to making the change in the AmeriCorps Portal. The program may also need to submit an AmeriCorps Request for Revision/Amendment Form (*AmeriCorps Program Fiscal Manual: Attachment B*) and/or an AmeriCorps Member Slot Conversion & Budget Modification Form (*AmeriCorps Program Fiscal Manual: Attachment C*) as applicable.

The Program Administrator will review the request and approve or disapprove the request in writing to the program via email or land mail within five (5) business days. The State Commission will not approve any budget or project revision which is inconsistent with the purpose or terms and conditions of the Federal grant to the State Commission or program. If the revision requested by a Competitive Grantee will result in a change to the program's approved project, the request requires prior Federal approval. The Competitive Grantee must work with their State Commission Office AmeriCorps Program Administrator who will obtain the Corporation's approval before approving the Competitive Grantee's request. The program will be held responsible during monitoring or compliance visits and audits to verify that the program budget, member living allowance, and/or member time record and/or contract reconcile to reflect the change(s).

1. *Member Slot Conversions*

- (a) Slot conversions that impact more than 10% of the total MSYs in a single program require that the program complete an AmeriCorps Member Conversion Worksheet and forward it to the State Commission for approval no less than five (5) business days prior to making the change in the AmeriCorps Portal. Programs must also complete a Budget Modification in CMS.
- (b) Member slot conversions that leave more than a minimum time MSY after the conversion require an amendment from the Corporation.

Change in Member Enrollment Period - Programs do not have the system permissions to change the Member Enrollment Period eGrants system. Programs must request a change in any Member Enrollment Period from their AmeriCorps

Program Administrator at the State Commission Office. Care should be taken to ensure that the new dates remain within the Budget Period dates and the new dates do not overlap with the Member Enrollment Period dates of a different program year for the same operating site.

2. *Changing a Term of Service (filled positions)* - Changes in terms of service may not result in an increased number of MSYs for the program.
 - (a) *Full-Time Members*—Programs may make occasional changes of currently enrolled full-time members to part-time members within the first three months of the member's service and within the constraints defined above in Section E sub-section (i) of the AmeriCorps Provisions. Impact on program quality should be factored into member slot conversions. The Corporation will not cover health care or child care costs for members not serving in a full-time capacity, therefore appropriate adjustments must be made. It is not allowable to transfer currently enrolled full-time members to a part-time status simply to provide a part-time education award.
 - (b) *Part-Time Members* - Converting part-time members to full-time is discouraged because it is very difficult to facilitate, unless done very early in the member's term of service. Programs may make such changes using the AmeriCorps Portal so long as they are within the first three months of the member's service, and the current budget can accommodate such changes. Programs must keep in mind that a member's minimum 1700 hours must be completed within 12 months of the member's original start date.

Portal Actions That Are Not Allowed At Any Time by Programs

1. Transfer Member Slots (filled or unfilled) between Programs.



OFFICE OF NATIONAL & COMMUNITY SERVICE

**AMERICORPS MEMBER SLOT CONVERSION &
BUDGET MODIFICATION FORM**

Program Name:

Date:

Contract Number:

Grant Year:

Contact Person:

Phone: ()

Change of Member Positions:	Current:	FT	HT	RHT	QT	MT
	Revised:	FT	HT	RHT	QT	MT
Request Conversion To:						

When positions are converted, the number of full-time equivalents must remain the same within your program to maintain the equivalent estimated cost per member.

Justification for Budget Revision or Conversion of Positions:
Include reason for revision and adverse consequences if revision is denied. Use additional sheets as necessary

Authorized Program Signature

Name (Printed)

Title

Date

FOR OFFICIAL USE ONLY

APPROVED

DENIED

ONCS Program Administrator

Name (Printed)

Date