



# SETTING UP MEMBER ACCOUNTS IN BWBRS

Updated March 2010

# Set-up your Members in BWBRS in 3 Easy Steps!

- This training will show PDs how to create a member profile on BWBRS in 3 easy steps!
- Set-up should be completed before CNVS AEAP receives the enrollment paperwork--no later than **15 calendar days** from the member's enrollment date in AmeriCorps.
- CNVS/AEAP will not activate the member profile if BWBRS information or enrollment packet information is incomplete – Incomplete or missing information **will** delay enrollment of your members.

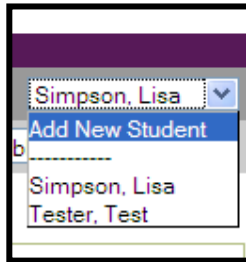
# What are the three steps?

Step	What is it?
1. Create a Member Profile	Minimum Member information
2. Create a Service Partner and Service Position	Service Site Description Form & Position Descr
3. Assign a Service Position (i.e. position descr) to a Member Profile	Link Position Description to specific Member

# Step 1: Create a Member Profile



1. Click on **Members** under the Administrator Menu (left-hand side).



2. Under **Available Actions** in the upper-right-hand side, click on “add new member.”

3. You will see a form with four boxes. Complete the form as follows:



Welcome Kristen Wolford  
Thursday, March 11, 2010

### Add New Member

#### CNVS Menu

- My Home Page
- Select Program
- Administrate Programs
- AmeriCorps Grantees
- Search
- Reports
- Manage Staff
- Manage Lists
- Manage Settings
- Manage Notifications
- Manage Auto Notifications
- Manage Site Style

#### Program Menu

- Members
- AmeriCorps Program
- Reports
- Manage Staff
- Manage Settings
- Manage Site Style

#### Member Menu

- Member Profile
- Position Descriptions
- Hour Logs
- Service Accomplishments

#### Positions & Events

- Service Partners & Positions
- Training & Enrichment Events

#### Program Participation

Check all that apply.

AmeriCorps

Starting Period

March 2010

**Step 1:  
Check Box**

**Step 2: Choose starting month**

#### Member Information

First Name

Middle Initial

Last Name

Nickname

Email Address

**Step 3: Enter basic member information:  
First name, Last name, Email Address  
(email address will be username).**

#### Member Details

Date of Birth

March 11 2010

Gender

Race

Marital Status

Voter Registration

Disabled

**Other information will be imported from the AmeriCorps system.**

#### Educational Information

Educational Level

Graduation Year

**Skip fields circled in red**

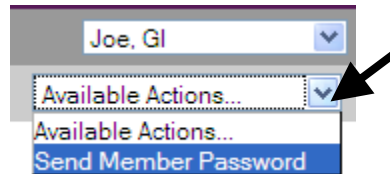
Save

**Step 4: Once member information has been entered, press 'Save'**



# Member Profile

- Send Members their password information by clicking Available Actions.



- Set up the Member Profile first, before moving on to Step 2.

# Member Enrollment

- When you save your member's information, you will see four tabs: General, Contact, Documentation, Enrollment.
- You can tell which tab is active by the tab color – Active tabs are highlighted in **PURPLE**.
- The **General** tab holds all of the information you entered in the last slide.
- Information for the **Contact** tab will be downloaded from the AmeriCorps system.
- The **Documentation** tab must be filled in by the PD

# Documentation

- The **Documentation** tab is where you will enter information from the **member eligibility** and the **criminal history check** forms.
- Please note: programs will not have to submit paper copies of these forms to CNVS/AEAP if the information is available on BWBRS.  
**Programs will still be required to keep copies of these forms and member eligibility documents in the member file.**

Welcome Kristen Wolford  
Thursday, March 11, 2010

Ryan Seacrest's Profile: Documentation

Add New Member

Open a New Case...

CNVS Menu

- My Home Page
- Select Program
- Administrate Programs
- AmeriCorps Grantees
- Search
- Reports
- Manage Staff
- Manage Lists
- Manage Settings
- Manage Notifications
- Manage Auto Notifications
- Manage Site Style

Program Menu

- Members
- AmeriCorps Program
- Reports
- Manage Staff
- Manage Settings
- Manage Site Style

Member Menu

- Member Profile
- Position Descriptions
- Hour Logs
- Service Accomplishments

Positions & Events

- Service Partners & Positions
- Training & Enrichment Events

- General
- Contact
- Documentation
- Enrollment

Citizenship Information

Citizenship

Documentation Type

Documentation ID Number

Identification

Government-Issued Photo ID Type

Government-Issued Photo ID Number

Criminal Background Check

Criminal Background

FBI Fingerprint/State Registry Check Initiated:

FBI Fingerprint/State Registry Check Completed:

NSOPR Check Completed:

Save

- Comments
- Event Log

Add Comment

Submit

Step 1: For a list of valid documents, please refer to the Member Eligibility form. If using a birth certificate, please enter the state of issue in the 'Documentation ID Number' section.

Step 2: Programs must certify that they have seen a government issued photo ID. Please note: Social Security cards and birth certificates are not acceptable documentation.

For a list of valid documents, please refer to the Criminal history Check form.

Step 3: Please refer to the next slide for background check procedures.



# Background Check Procedures

- For a complete outline of CNVS/AEAP background check requirements, please refer to your PD handbook.
- In the **Documentation** tab, please indicate the criminal history check initiation and/or completion date

# Background Check Procedures: Dates

- The criminal history check must be initiated on or before the member start date.
- If the criminal history check has been initiated, PD must document that the check has been completed within 60 days of the member start date.
- Also, the program must submit a Site Supervisor criminal history check form with the enrollment paperwork for members with incomplete criminal history checks.
- The NSOPR check must be completed on or before the member start date.
- Finally, when you have completed the criminal history check for your member, please indicate that the member has passed.
- Please note: if the criminal history check for your member is deemed insufficient or invalid, enrollment **will** be delayed.

**Citizenship Information**

**Citizenship** U.S. Citizen  
**Documentation Type** U.S. Passport  
**Documentation ID Number** 123456789

**Identification**

**Government-Issued Photo ID Type** U.S. Passport  
**Government-Issued Photo ID Number** 123456789

**Criminal Background Check**

**Criminal Background** Checked: Passed  
**FBI Fingerprint/State Registry Check Initiated:** July 1 2010  
**FBI Fingerprint/State Registry Check Completed:** July 31 2010  
**NSOPR Check Completed:** July 1 2010

Save

Final step: When you have entered the Documentation information, press 'Save.'

**Add Comment**

Submit



# Member Enrollment

- When you click on the **Enrollment** tab, you will see two links: [AmeriCorps \(1<sup>st</sup> Enrollment\): Prospective](#) and [AmeriCorps \(2<sup>nd</sup> Enrollment\): Prospective](#)
- For first term members, please use the [AmeriCorps \(1<sup>st</sup> Enrollment\): Prospective](#) link.

Open a New Case...

Available Actions...

General Contact Documentation **Enrollment**

AmeriCorps (1st Enrollment)

Prospective

AmeriCorps (2nd Enrollment)

Prospective

**Current Status**

Program Name AmeriCorps (1st Enrollment)  
 Enrollment Status **Pending Enrollment**  
 Grant Year 2010-2011

**Enrollment Information**

Enrollment Type Full Time (1 yr - 1700 hr)  
 Start Date August 1 2010

**Completion Information**

Date of Suspension  
 Date of Reinstatement  
 Required Exit Date July 31 2011  
 Actual Completion Date

**Step 1: Please indicate enrollment status and grant term. Please note: all enrollments should be marked as Pending. CNVS/AEAP will officially activate members when the enrollment paperwork has been approved.**

**Step 2: Enter member service term - Full Time (1700 hours), Part Time (900 hours) or Minimum Time (300 hours) and member start date.**

**Step 3: Enter the required exit date.**

**AmeriCorps Hour Totals**

	Men Log	CNS Official
Service Hours		
Training Hours		
Total Hours	0	0

**AmeriCorps Status History:**  
 This box will show any updates to the member status (i.e. enrollment, activation, exit, etc.)

**DON'T FORGET TO SAVE!**

**AmeriCorps Status History**

Period	Status	Step	Date	Changed By
August 2010	<b>Prospective</b> <sup>1 2</sup>	Pending Enrollment	08/01/10	Kristen Wolford

1 = Period starting status. 2 = Period ending status. Bold = Current status.

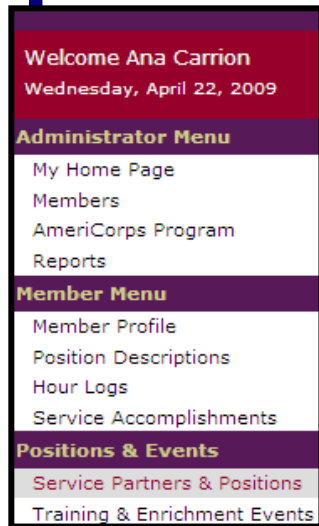
# Second Term Members

- Active members will already be listed in your BWBRS queue. Please check your member list before entering information for continuing members. Please note: You may have to choose 'All Statuses' from the drop down menu to get a full list of members.
- If your member is already in the BWBRS system, click on their name in the member's list.
- You will be taken to the member enrollment form with the tabs for **General, Contact, Documentation and Enrollment**. Please take a few moments to update any relevant information from this section.

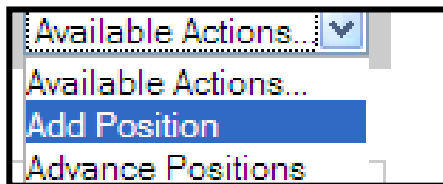
# Second Term Members: Enrollment

- In the **Enrollment** tab, you will see two AmeriCorps enrollment links. If your member is still active, the 1<sup>st</sup> AmeriCorps enrollment will still be listed as active until your member has been exited from the 09-10 term. If your member has been exited, the 1<sup>st</sup> term will be listed as 'Alumni.'
- To enroll your member in their new AmeriCorps term, please click on the 2<sup>nd</sup> AmeriCorps enrollment link and follow the steps listed in the previous slides.

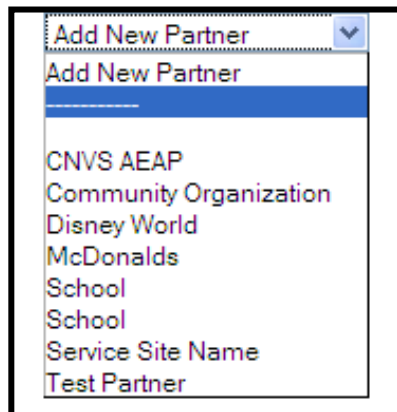
# Step 2: Create a Service Partner.



1. Click on **Service Partners & Positions** in the Positions and Events Menu (lower left-hand side).



2. Under **Available Actions** in the upper-right-hand side, click on “add position.”



3. Click on **Add New Partner**, or you may be able to select from a list of partners already in the system.

### New Service Partner Information

Name	<input type="text"/>
Address	<input type="text"/>
Address Line 2	<input type="text"/>
City	<input type="text"/>
State	<input type="text" value="▼"/>
International State	<input type="text"/>
Country	<input type="text" value="▼"/>
Zip Code	<input type="text"/>
Phone Number	<input type="text"/>
Fax Number	<input type="text"/>
Website	<input type="text"/>

Skip Fields circled in red.

Service Site Information



### Site Supervisor Information

First Name	<input type="text"/>
Last Name	<input type="text"/>
Email Address	<input type="text"/>
Phone Number	<input type="text"/>
Title	<input type="text"/>
Department	<input type="text"/>

Site Supervisor information (should be entered within 30 days of member start date). Once you save, you can add additional Site Supervisors for this site under [Available Actions by Adding Contact](#).



### Position Information

Title	<input type="text"/>
Description	<input type="text"/>
Location	<input type="text" value="National"/>

Write-in position title and position description. Max 2000 characters.



### Issue Area

Primary Issue Area	<input type="text" value="General Issue Area"/>
--------------------	---

## Issue Area

**Primary Issue Area**

**Population Served**

Select Issue Area and population served based on position description.

## Commitment Information

**Hours per Week**

**Percent Fundraising**

**Duration**

**Start Date**

**End Date**

**Sign Up By:**

**Service Times/Schedule**

**Commitment Information:**  
Enter hours per week. Please note: Members are no longer permitted to count fundraising hours towards AmeriCorps service.

Please note: members will still be able to log service accomplishments against different areas/populations if required.

Start and End dates should match the member enrollment and exit dates.

Skip fields circled in red.

## Administrative Settings

**Year**

**Available to**

**Number of Slots**

**OK for AmeriCorps**

**Federal Work Study Eligible**

**Criminal Background Check Required**

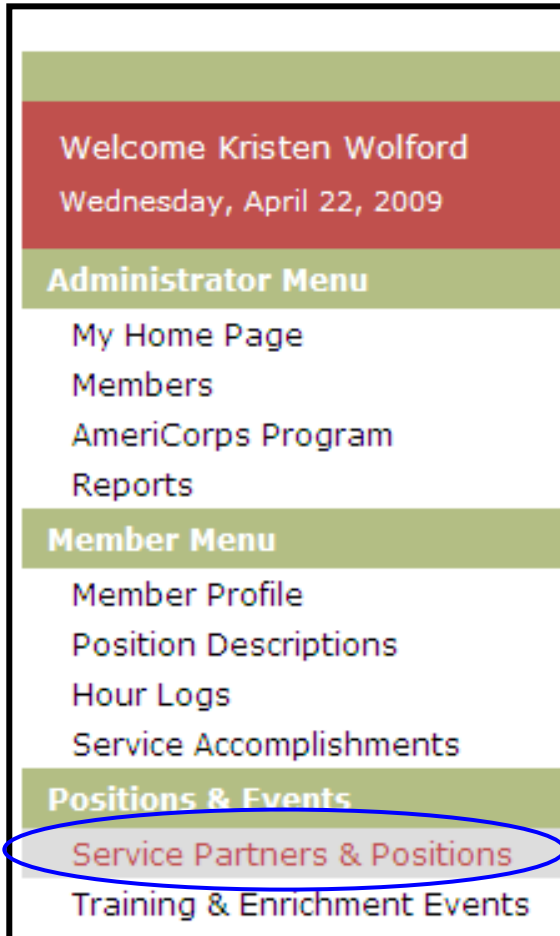
For 'Available to' choose the corresponding member. If more than one member will be using this position, leave it available to all and mark the appropriate number of slots in the space allocated.

Save

Don't forget to save!



# More on Service Partners & Positions Menu



Under Available Actions. . .

- You can Add positions to an existing service partner.
- You can Advance an existing position. This will activate an existing position for use in the next grant year(s). (Later you may edit details if you wish)

# STEP 3: ASSIGN A POSITION TO A MEMBER



Welcome Ana Carrion  
Wednesday, April 22, 2009

**Administrator Menu**

- My Home Page
- Members
- AmeriCorps Program
- Reports

**Member Menu**

- Member Profile
- Position Descriptions
- Hour Logs
- Service Accomplishments

**Positions & Events**

- Service Partners & Positions
- Training & Enrichment Events

- The position description created in Step 2 serves as a template for the **Position Description** assigned to a particular member.
- Members will be able to log hours and service accomplishments against that position.
- **Members cannot have more than 2 position descriptions assigned to them.**



## **Go to Position Descriptions in Member Menu**

1. Select member by name in the upper-right hand corner.
2. Under Available Actions, “Add a Position Description.”
3. Select Service Opportunity.

## Add Position Description

Skip fields circled in red.

### Service Partner

**Name** Vegan King  
**Address** 12345 Vegan Whopper Way  
**City, State Zip Code** Burgertown, PA 00000  
**Country** United States

Most fields will be pre-filled and only need a review.

### Position Information

**Title** Chef

**Position Description**  
0 of 2000

**My Role**

**Year** 2008-2009

**Hours per Week**

**Percent Fundraising** 0%

### Primary Objective

**General Issue Area** Please Select...

**Specific Issue Area** Select General Issue First

**Population Served** Please Select...

**Objective** Select Issue Area First

**Service Goal** Select General Issue First

**Measured By** Select General Issue First

**Describe**  
0 of 500

Enter General Issue area, Specific Issue Area and Population served.

### Secondary Objective (optional)

# Adding a Position Description-cont.

SKIP FIELDS  
CIRCLED  
IN RED

**Secondary Objective (optional)**

General Issue Area

Specific Issue Area

Population Served

Objective

Service Goal

Measured By

Describe  
0 of 500

---

**Learning Goals**

Objective 1

Objective 2

Describe  
0 of 500

**Don't forget to Save!**

- Skip Secondary Objective and Learning Goals.

- Don't forget to hit Save!

# Proposed Position Descriptions

- When you finish adding position description(s) for a member, you will see the status as “**proposed.**”

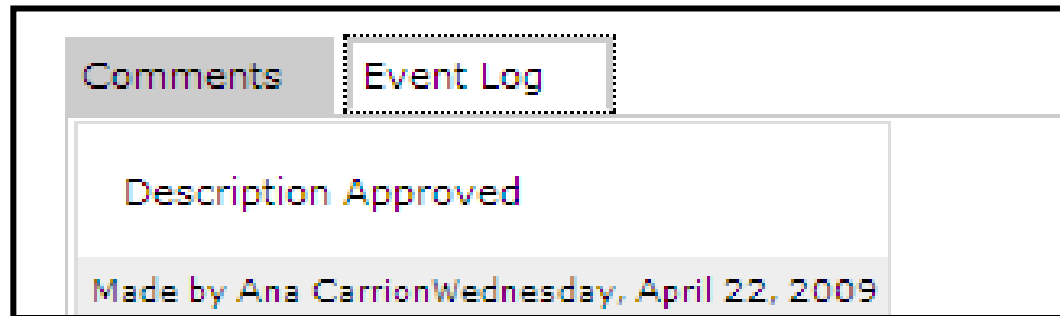
Under **Available Actions**, you can:

Edit Description	Allows you to make edits.
Permanently Delete the Description	Only do this when the position was entered erroneously.
Print	Print position description for your records.
Other Functions	Should only be used by CNVS/AEAP Staff.

- The position is now pending CNVS AEAP approval.

# Proposed vs. Active Position Descriptions

- Once the position description has been approved by CNVS, then the position status will change to “**active**”.
- Clicking on an **active** position description, it will also be marked “nationally reviewed” and event log will show detail.



# CNVS AEAP Review of Position Descr

Welcome Ana Carrion  
Wednesday, April 22, 2009

Licensee Menu  
My Home Page  
Select Program

Position Description for Lisa Simpson

Open a New Case...  
Open a New Case...  
Not appropriate for AmeriCorps  
Missing Information  
Inappropriate lanaguage

CLA Information  
Title

- If there is a problem with the position description, it will be marked **AmeriCorps OK: No**, and a Case will be Opened.

Case Notes Comments Event Log

Not appropriate for AmeriCorps by Ana Carrion on 04/22/09

Position description contains activities not approved by americorps.

Made by Ana Carrion Wednesday, April 22, 2009

Add Comment  
Submit  
 Close Case

- Case Management Notes can be found at the foot of the page.

CNVS Catholic Network of Volunteer Service  
AmeriCorps

Welcome Ana Carrion  
Wednesday, April 22, 2009

Administrator Menu  
My Home Page  
Members  
AmeriCorps Program  
Reports  
Member Menu  
Member Profile  
Position Descriptions  
Hour Logs  
Service Accomplishments  
Positions & Events  
Service Partners & Positions  
Training & Enrichment Events

Reports

Tracking  
Position Descriptions Review  
AmeriCorps Hours Remaining  
Hour Log Summary  
Criminal Background Check - Member  
Criminal Background Check - Positions

Analysis  
Add a News Article

Management  
Case Overview Report

- Open **Case Management** issues will be reflected in the **Reports** section, under the **Administrative Menu**.
- You must edit the position description and re-submit it for approval.

# Active Position Descriptions

- Once a position is active, under **Available Actions**, you can:

Complete Description and Notify Member	This function <b>de-activates</b> a current position description. It should be used <b><u>only</u></b> when a member <b><u>changes</u></b> position descriptions or when the member <b><u>exits</u></b> . <b>Members will not be able to log hours for this position once it is completed.</b>
Cancel Description	This function is <b><u>only</u></b> to be used when a position description is created by <b>mistake</b> (i.e. duplicate) and <b><u>only</u></b> if there are <b><u>no hours</u></b> logged against the position. <b>Be careful!! Cancelling invalidates any hours served at any one time.</b>
Mark AmeriCorps OK: No	Applies only to CNVS AEAP staff.
Print	Print position description for your records.

# Member Set-up is Complete!

- Once you have completed this process and entered in BWBRS:
  - ✓  Member information
  - ✓  Service partners & position descriptions
  - ✓  Assigned position description to members

**AND**

- ✓  CNVS receives complete enrollment packets (eligibility, criminal history check and service description forms are not required if the program sets up the information in BWBRS).

**Your members will now be ready to be enrolled and to start reporting hours and service activities online.**

# BWBRS Online

- To log directly onto the BWBRS page, go to [www.bwbrs.org](http://www.bwbrs.org)
- For orientation and training materials, BWBRS policies and updates to the system, go to:  
[www.cnvs.org/americorps/bwbrs.php](http://www.cnvs.org/americorps/bwbrs.php)