



AmeriCorps

Office of Monitoring

WizeHive Zengine Platform External User Guide

Updated March 22, 2022



The External User Guide provides instructions related to completing actions within the WiseHive system used by the AmeriCorps Office of Monitoring. This includes the initial login, review and updating of organization information, review and acceptance of monitoring assignments, and the uploading of documentation to support the monitoring activities. Additionally, it includes instructions on how to access the final monitoring report and complete Corrective Action Planning, if applicable.

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Initial Portal Entry and Login

1. Users will receive an email from no-reply@email.zenginehq.com. This notification will indicate users assigned monitoring activity, the grant number of the grant being monitored, and the name and email of users monitoring officer.

Please note that there are separate submission portals for WizeHive based on the monitoring activity user has been assigned. Please click on the submission portal link that aligns with the monitoring activity you have been assigned. Each Monitoring Activity has a different submission portal (**Change in FY22 Workspace**).

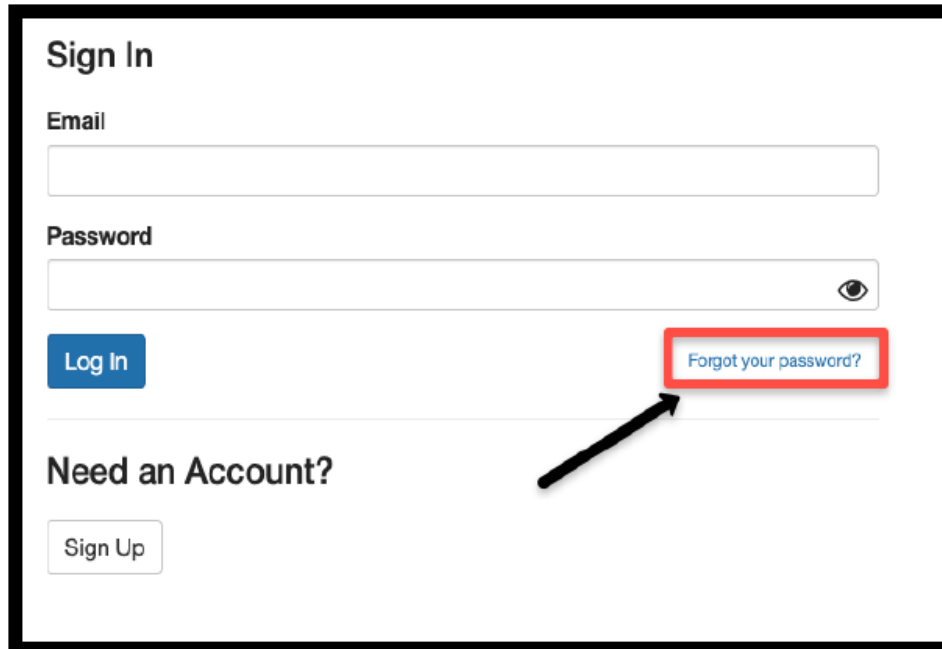
[FOFA](#), [Subrecipient](#), [Program-ASN](#), [Program-ASN Commission](#), [Program-VISTA](#), [Program-SCP](#), [Program-RSVP](#), [Program-FGP](#), [Program-Days of Service](#), [Prohibited Activities](#), [NSCHC](#), [New to AmeriCorps](#).



Note: The AmeriCorps Office of Monitoring created a user account for the Authorized Representative listed for the grant selected for monitoring. If this user would like to assign a

different person (or different email account) to the grantee's account, they must reach out to their Monitoring Officer to make the request.

2. When users visit the submission portal landing page, they will need to set up a new password.
 - a. To set up a new password, select the "Forgot Your Password?" link.



The image shows a screenshot of a web form titled "Sign In". It contains two input fields: "Email" and "Password". Below the "Password" field is a blue "Log In" button and a link labeled "Forgot your password?". The "Forgot your password?" link is highlighted with a red rectangular box, and a black arrow points to it from the right. Below the "Log In" button is a section titled "Need an Account?" with a "Sign Up" button.

- b. Input the email address that was used to create the account (the email address the notification was sent to).
 - i. A password reset email will be sent to that email.

Password Recovery

Enter your email address below to reset your password. An email will be sent to this address with additional instructions.

Email

Reset Password

- c. Once the previous steps have been completed, the user will receive an email from Web Portal App (no-reply@webportalapp.com).



- d. Click the link within the email to open the password reset page.

Please enter a new password below and confirm it to change your password.

Password

Must contain at least one lowercase letter
 Must contain at least one uppercase letter
 Must contain one number
 Must be between 8 and 32 characters
 Must not be an email address

Confirm Password

Passwords must match

Reset

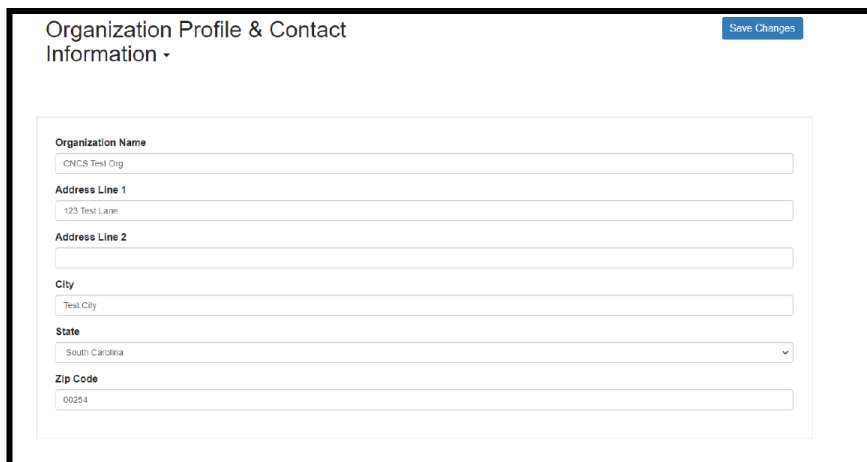
- e. After the user establishes their password, they can log in to the AmeriCorps monitoring portal for the first time.

Updating the Organization Profile

1. When the user logs in they will be able to update the organization and associated contact information by selecting the "Edit" button on the Organization Profile and Contact Information section.



2. In this section the user can update their Organization Name and address information within WizeHive.

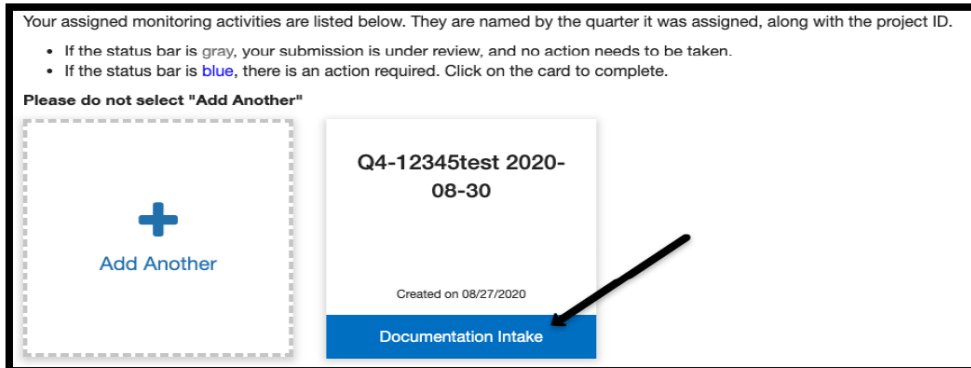
A screenshot of the 'Organization Profile & Contact Information' form. The form is titled 'Organization Profile & Contact Information' and has a 'Save Changes' button in the top right corner. The form contains several input fields: 'Organization Name' (with 'CNCS Test Org' entered), 'Address Line 1' (with '123 Test Lane' entered), 'Address Line 2' (empty), 'City' (with 'Test City' entered), 'State' (a dropdown menu with 'South Carolina' selected), and 'Zip Code' (with '00254' entered).

Note: The user may associate only one email address with the Organization Profile in the submission portal. The Authorized Representative is the default email. Users cannot change

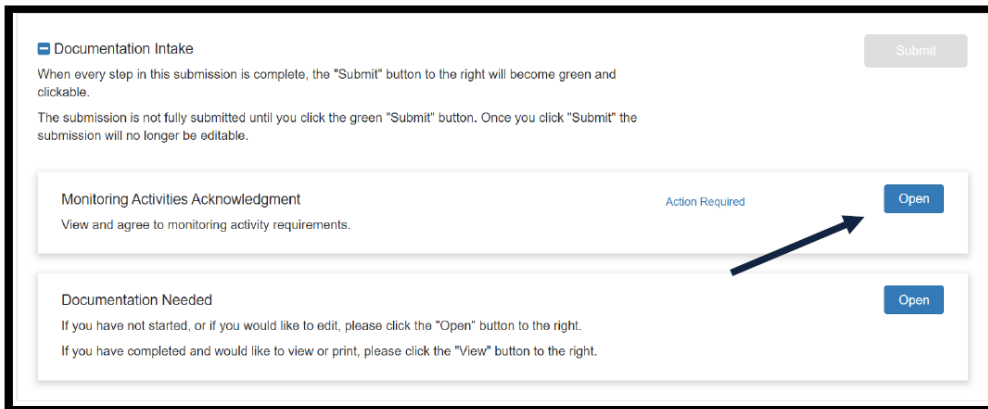
the primary email address on their own. To change the primary email, reach out to the Monitoring Officer conducting the monitoring assignment.

Review of Assigned Monitoring Activities

1. The user can proceed to review their Monitoring Activities by selecting "Documentation Intake."



2. First, select the "Open" button for the item "Monitoring Activities Acknowledgement."



3. Review the monitoring activity information and click “Yes” to “Confirm acceptance of monitoring activity responsibilities.” This serves as an acknowledgement that the user is aware of the activities assigned to them and that they were able to access WizeHive.

The screenshot shows a form with the following fields and sections:

- Quarter:** Q4
- Year:** 2020
- Please complete by the following deadline**
- Documentation Deadline Date:** 08/30/2020
- Grant Project:** 12345test
- Monitoring Activities:**
 - fiscal
 - operational
 - subrecipient
 - Program - AmeriCorps
 - Program - VISTA
 - Program - Senior Corps
- Confirm acceptance of monitoring activity responsibilities:**
 - yes

A red rectangular box highlights the "Confirm acceptance of monitoring activity responsibilities" section, and a black arrow points to the "yes" checkbox within this section.

4. Once complete, select the blue “Mark Complete” button to return to the WizeHive landing page.



Documentation Upload

1. The user will select the "Open" button to proceed to the "Documentation Needed" section.

Documentation Intake Submit

When every step in this submission is complete, the "Submit" button to the right will become green and clickable.

The submission is not fully submitted until you click the green "Submit" button. Once you click "Submit" the submission will no longer be editable.

Monitoring Activities Acknowledgment Complete Edit

View and agree to monitoring activity requirements.

Documentation Needed

If you have not started, or if you would like to edit, please click the "Open" button to the right.

If you have completed and would like to view or print, please click the "View" button to the right.

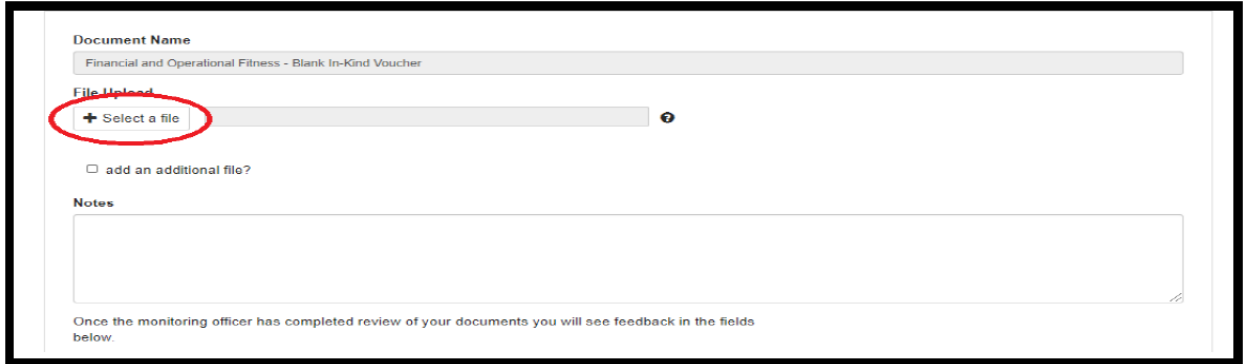
Open

2. Open each document section to review all requested documentation.

Note: If a document is being requested that the user believes is not applicable to their organization or grant selected for monitoring, they must note this exception in the Notes section within the document request and mark the document request as complete.

Document Name	Status	Action
General Ledger (Exported to Excel if Possible) for the Project	draft	Open
Project/Grant Income Statement for Period	draft	Open
Chart of Accounts	draft	Open
Fiscal Policies/Accounting Handbook	draft	Open
Match Ledger (Exported to Excel) or Tracking Schedule	draft	Open

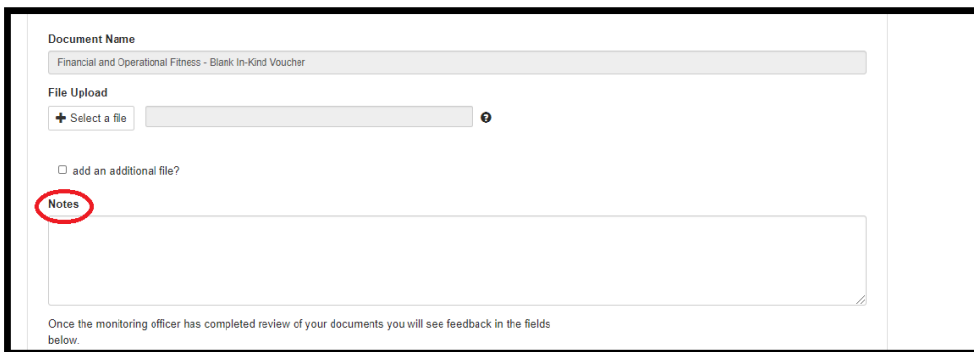
3. The user will select the “+Select a file” button to upload necessary documents.



The screenshot shows a form titled "Document Name" with the text "Financial and Operational Fitness - Blank In-Kind Voucher". Below this is a "File Upload" section containing a button labeled "+ Select a file" which is circled in red. There is also a checkbox labeled "add an additional file?". Below the file upload section is a "Notes" text area. At the bottom of the form, there is a small text note: "Once the monitoring officer has completed review of your documents you will see feedback in the fields below."

Note: If the user needs to upload additional documents, they should check the box labeled “add an additional file?” Under the “Select a file” field. Up to 31 files can be added.

4. Users can add any additional information, or communicate specific issues related to documentation in the notes section below the upload field.



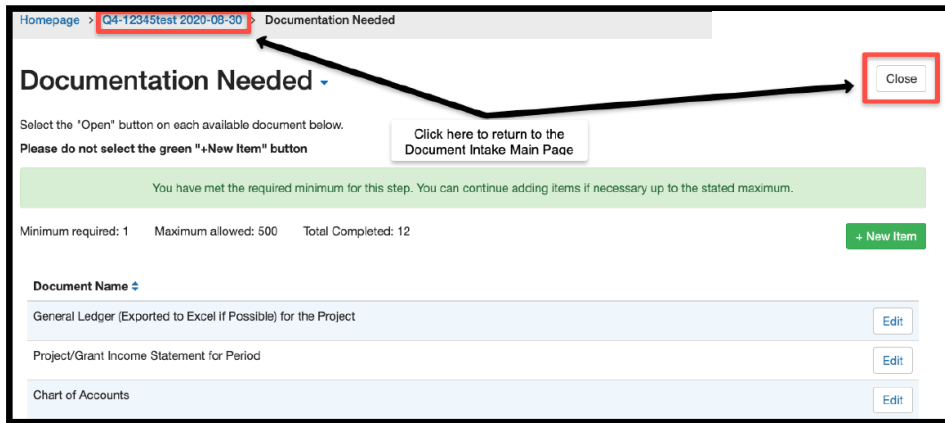
This screenshot is similar to the previous one, showing the "Document Name" and "File Upload" sections. In this view, the "Notes" text area is circled in red. The "add an additional file?" checkbox is also visible. The same feedback note is present at the bottom.

5. Once the files are uploaded, the user should select the blue “Mark Complete” button to finish the document submission.

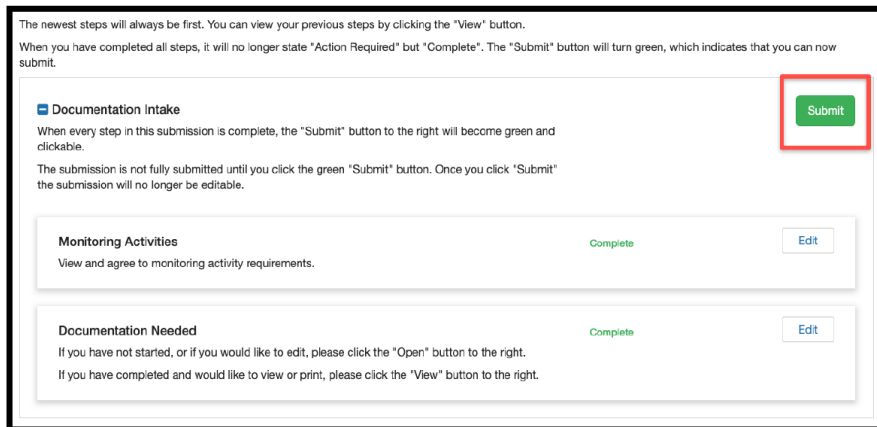


The screenshot shows three buttons in a row: "Save Draft", "Mark Complete", and "Close". The "Mark Complete" button is highlighted with a red rectangular border.

6. After all documents are uploaded, the user can return to the main page by selecting the "Close" button.

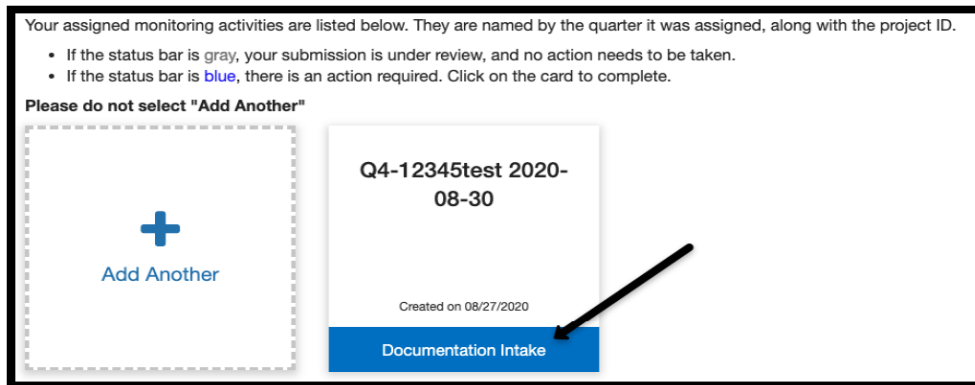


7. Once both sections are complete, the "Submit" button will become available. Be sure to click "Submit" to complete the document submission. This will notify the Monitoring Officer the documents are ready for review.

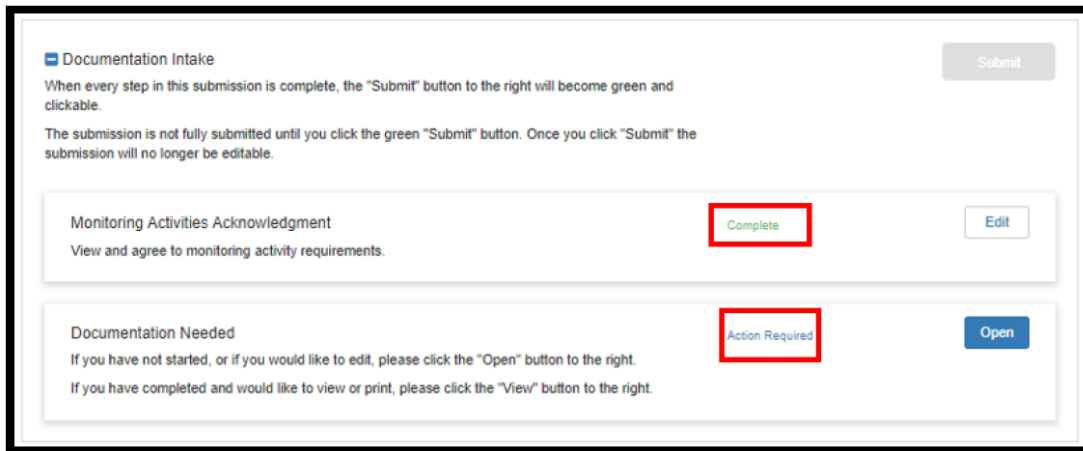


Grantee Documentation: Changes/Supplemental Documentation Requested

1. When the Monitoring Officer returns the Monitoring Activity to the user for clarification or supplemental documentation, the user will receive an automatic email notification. Should any clarification or supplemental documentation submission be required, all details will be included within WizeHive.
2. Upon logging in to WizeHive, the portal will look like the first time the user logged in. Click on the monitoring activity in question.

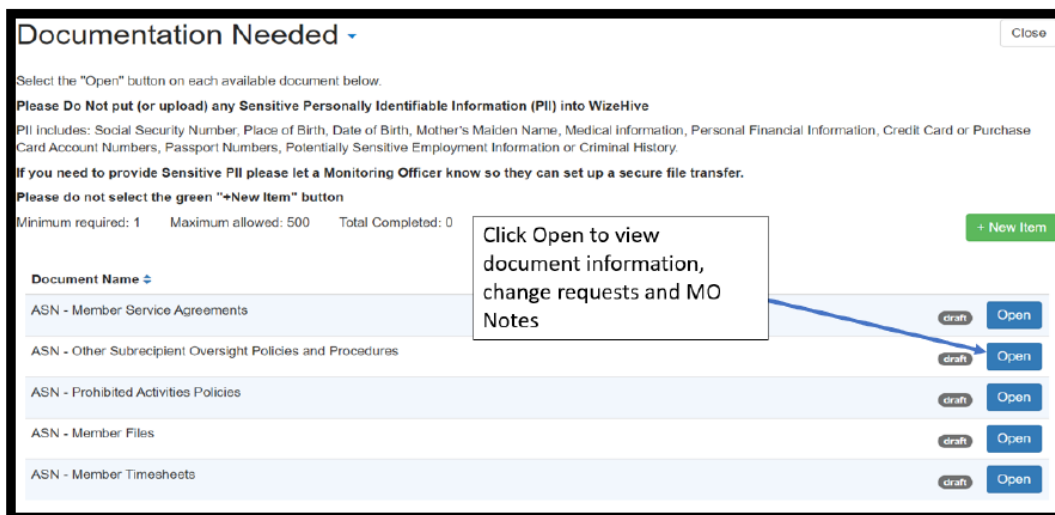


3. The initial "Monitoring Activities Acknowledgement" will remain in the Complete status while the "Documentation Needed" will indicate Action Required.



4. Select "Open" to the right of "Documentation Needed" to see the list of requested documents that need to be reviewed, revised, or submitted. Be sure to open every document that appears in this list.

Note: documents that have been previously submitted and accepted for review will not appear in this list.



5. Upon clicking into the document, the user will be able to see the “Meets Requirements” status under the original submission. This status will either be **Clarifications Required**, **Missing Required Document** or **Needs Supplemental Documentation**.

Monitoring Officer Review

Once the monitoring officer has completed review of your documents you will see feedback in the fields below.

Meets Requirements
Need Supplemental Documentation

Notes
Please provide additional information about A, B, C.

Supplemental Documentation

Documentation Requested

Supplemental Documentation Requested

- Position Descriptions
- Project Staff Budget Information

Position Descriptions
AmeriCorps Member Position Description / VISTA Assignment Description / Senior Corps Volunteer Assignment Description for each of the selected AmeriCorps / Vista Member or Senior Corps Volunteer

Project Staff Budget Information
Information on whether or not the selected Staff (Prime Grantees and Site Supervisors) are included on the grant budget either as a direct cost or as a match.

File Upload

6. If the status is **Clarifications Required** or **Missing Required Document**, there will be a note from the Monitoring Officer requesting additional information. If the status is **Need Supplemental Documentation**, additional information will be noted below the Notes section describing what is being requested. There may also be notes in the Notes section specific to a subgrant/s, subaward/s, or volunteer/s.
7. The user will select the “+Select a file” button to upload necessary documents.

The screenshot shows a form with the following elements: a 'Document Name' field containing 'Financial and Operational Fitness - Blank In-Kind Voucher'; a 'File Upload' section with a '+ Select a file' button circled in red; a checkbox labeled 'add an additional file?'; a 'Notes' text area; and a footer note: 'Once the monitoring officer has completed review of your documents you will see feedback in the fields below.'

Note: If the user needs to upload additional documents, they should check the box labeled add “an additional file?” Under the “Select a file” field.

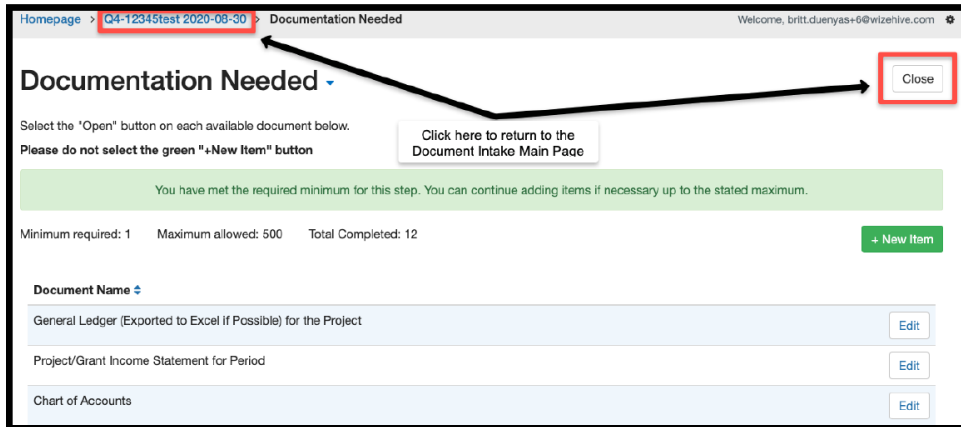
8. Users can add any additional information, or communicate specific issues related to documentation in the notes section below the upload field.

This screenshot is identical to the previous one, but the 'Notes' label is circled in red to highlight the text area for additional information.

9. Once uploaded the user will select the blue “Mark Complete” button.

A row of three buttons: 'Save Draft' (light blue), 'Mark Complete' (dark blue and circled in red), and 'Close' (light gray).

10. After all documents are uploaded, the user can return to the main page by selecting the "Close" button.



11. Once both sections are complete, the "Submit" button will become available. Select the "Submit" button to complete the documentation submission process. This will send a notification to the Monitoring Officer that the documentation is ready for review.

The newest steps will always be first. You can view your previous steps by clicking the "View" button.

When you have completed all steps, it will no longer state "Action Required" but "Complete". The "Submit" button will turn green, which indicates that you can now submit.

Documentation Intake

When every step in this submission is complete, the "Submit" button to the right will become green and clickable.

The submission is not fully submitted until you click the green "Submit" button. Once you click "Submit" the submission will no longer be editable.

Monitoring Activities Complete

View and agree to monitoring activity requirements.

Documentation Needed Complete

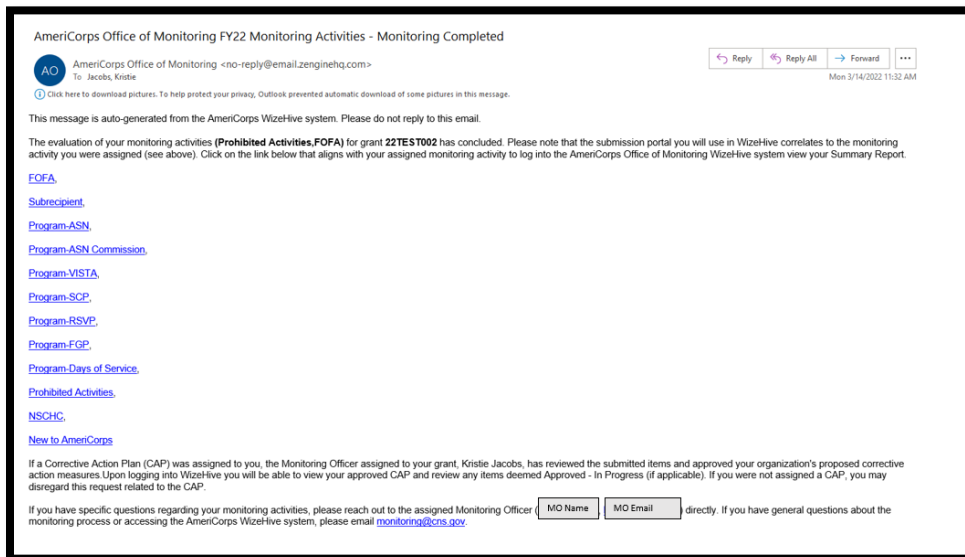
If you have not started, or if you would like to edit, please click the "Open" button to the right.

If you have completed and would like to view or print, please click the "View" button to the right.

Grantee Results Summary Review

1. After the Monitoring Officer has completed their review, users will receive an email either stating that their monitoring activity is "Complete," or that they must complete a Corrective Action Plan (CAP) and the monitoring assignment is now in the status "CAP Intake." This notification will indicate the assigned monitoring activity, the grant number of the grant being monitored, and the name and email of the monitoring officer.

Note: Any additional documentation submitted after this point will be considered part of the CAP.



- a. Please note that there are separate submission portals for WizeHive based on each monitoring activity the user has been assigned. Please click on the submission portal link that aligns with the monitoring activity assigned. In some cases, more than one activity will be assigned, and the users will have access to the individual portals.

Each Monitoring Activity has a different submission [FOFA](#), [Subrecipient](#), [Program-ASN](#), [Program-ASN Commission](#), [Program-VISTA](#), [Program-SCP](#), [Program-RSVP](#), [Program-FGP](#), [Program-Days of Service](#), [Prohibited Activities](#), [NSCHC](#), [New to AmeriCorps](#).

Sign In

Email

Password

[Forgot your password?](#)

Log In

Need an Account?

Sign Up

- Once the user has logged into the portal, they will see their assigned monitoring activity status. In this case, it can be either "Completed Process" or "CAP Intake".

Corrective Action Plan Required

Your assigned monitoring activities are listed below. They are named by the quarter it was assigned, along with the Grant #.

- If the status bar is gray, your submission is under review, and no action needs to be taken.
- If the status bar is navy, there is an action required. Click on the card to complete.

Please do not select "Add Another"

22TEST002-2040

Created on 03/11/2022

Summary/CAP Intake

Complete

Your assigned monitoring activities are listed below. They are named by the quarter it was assigned, along with the Grant #.

- If the status bar is gray, your submission is under review, and no action needs to be taken.
- If the status bar is navy, there is an action required. Click on the card to complete.

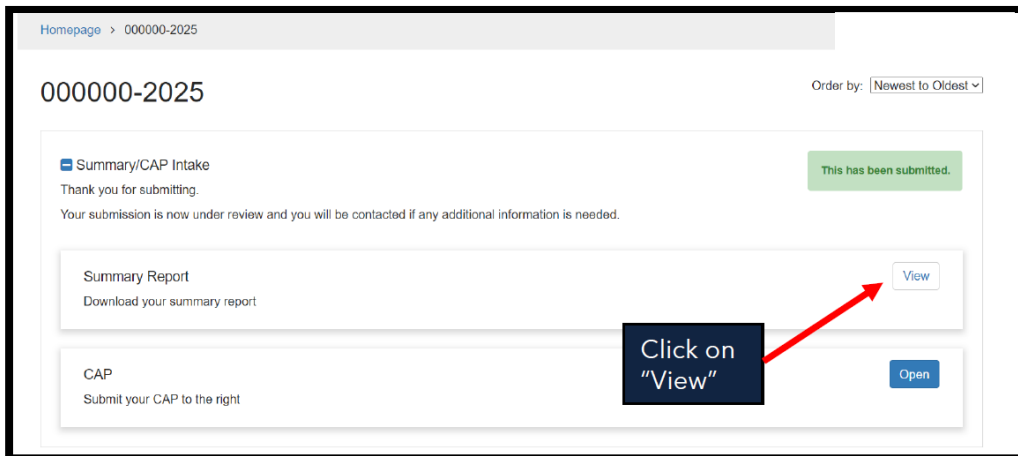
Please do not select "Add Another"

22TEST002-2040

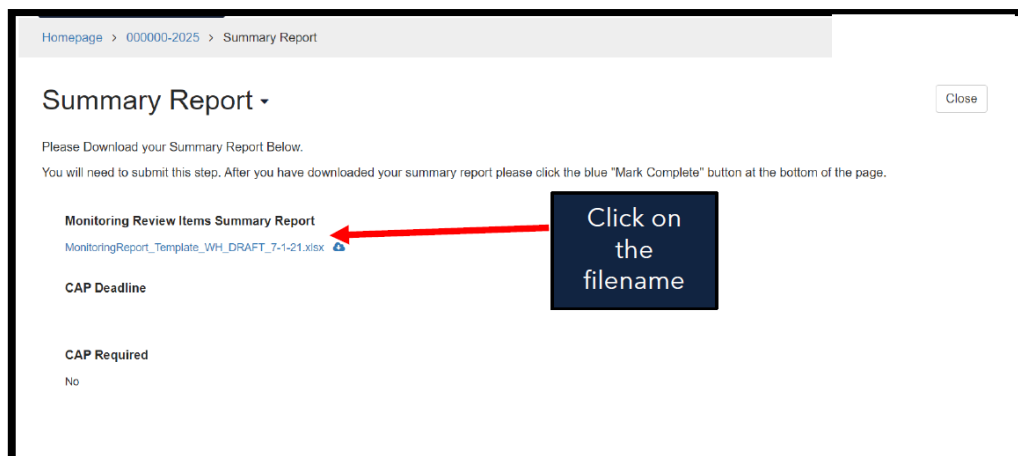
Created on 03/11/2022

Completed Process

- The user can click on that item to open the same page where they reviewed and uploaded all documentation submissions. A new section named "Summary/CAP Intake" will be visible.
- The user should click on "View" to access and download the Summary Report.



5. Click on the file name on this page to download a copy of the report. If applicable, the user will also be able to see if a CAP has been assigned and the due date of the initial submission.

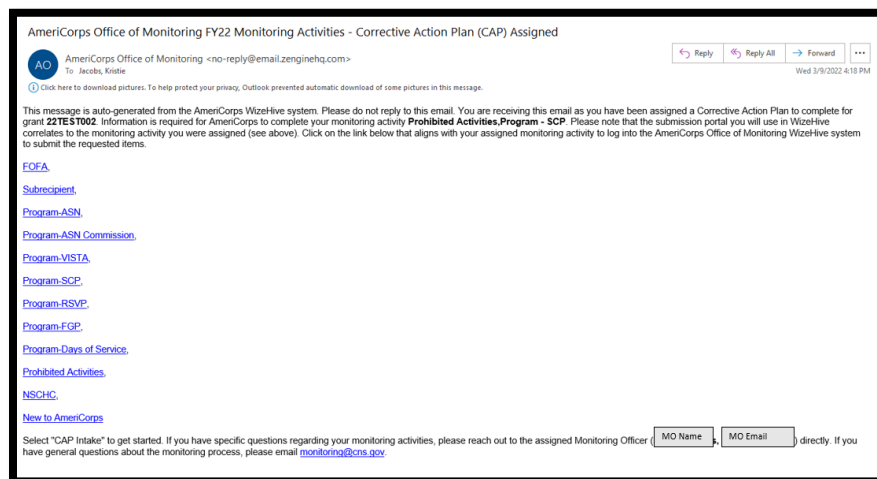


Grantee CAP (Corrective Action Planning) Intake (If Applicable)

1. Users will receive an auto-email from the AmeriCorps monitoring system portal with a link to the WiseHive login screen.

Please note that there are separate submission portals for WiseHive based on the monitoring activity user has been assigned. Please click on the submission portal link that aligns with the monitoring activity you have been assigned. Each Monitoring Activity has a different submission portal.

[FOFA](#), [Subrecipient](#), [Program-ASN](#), [Program-ASN Commission](#), [Program-VISTA](#), [Program-SCP](#), [Program-RSVP](#), [Program-FGP](#), [Program-Days of Service](#), [Prohibited Activities](#), [NSCHC](#), [New to AmeriCorps](#).



2. Users will input their login information and password to gain access to the monitoring system portal.

Sign In

Email

Password

[Log In](#) [Forgot your password?](#)

Need an Account?

[Sign Up](#)

3. Users will select the CAP Intake Status bar to proceed to the CAP Intake documents.

Organization Profile & Contact Information

Your assigned monitoring activities are listed below. They are named by the quarter it was assigned, along with the Grant #.

- If the status bar is gray, your submission is under review, and no action needs to be taken.
- If the status bar is blue, there is an action required. Click on the card to complete.

Please do not select "Add Another"

[Add Another](#)

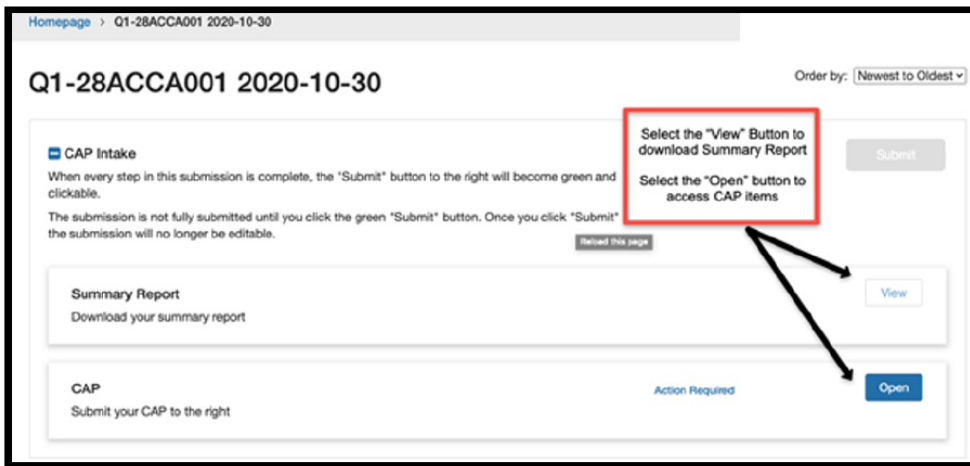
Q1-28ACCA001
2020-10-30

Created on 09/16/2020

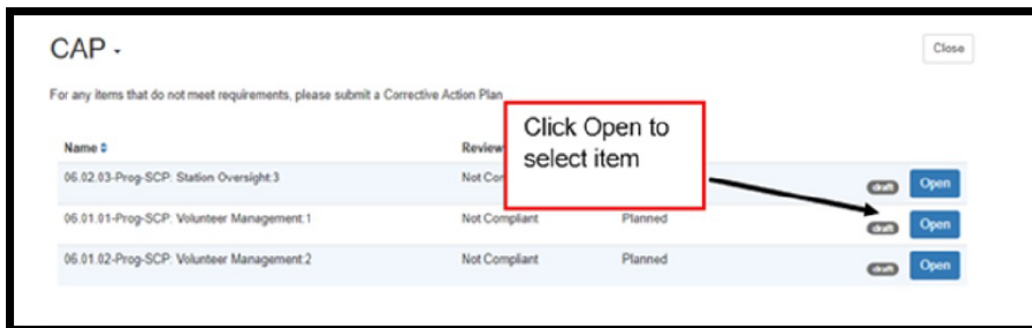
CAP Intake

Select Cap Intake Status to continue

4. Here, users can review and download the CAP information.
- To download the summary report, select the "View" button in the Summary Report Section. This will outline all items reviewed during monitoring.
 - To review and respond to individual CAP items, select the "Open" button in the CAP Section.



5. Click "Open" to review each assigned CAP item.



6. Users will view the CAP "Review Status" and notes left by the Monitoring Officer.

7. Scrolling down, the user will see the Corrective Action Plan section, including:
 - a. AmeriCorps Findings
 - i. Section Title
 - ii. Question - The compliance question Monitoring Officers were asked.
 - iii. Issue - The compliance issue found while answering the question.

- b. Grantee Response Fields for CAP
 - i. Users must enter a response to four corrective action response fields to address root cause, corrective measures, expected outcomes, and

responsible parties. Question prompts are provided as a guide and any details that can be provided are welcomed.

1. Root Cause

Root Cause
What is causing the problem at hand?

- Are there flaws in the work processes that led to the issues?
- Has this type of issue occurred before and, if so, what caused it to recur?
- What should actually be happening?

Root Cause:

required

2. Corrective Measures

Corrective Measures
How can the problem be fixed?

- Re-evaluate a procedure?
- Identify someone to conduct training on the correct way to do the tasks?
- Strengthen checks and balances to ensure issues do not recur?
- Establish improved protocols?

Corrective Measures:

required

3. Expected Outcomes

Expected Outcomes
 How will they know if corrective measures are working or not?

- Is the objective/activity specific (measurable)?
- Is 100% compliance attainable?
- Are outcomes relevant to the issue?

Expected Outcomes:

required

4. Responsible Parties

Responsible Parties

- Who is doing what?
- How and when will they report progress?
- What supporting documentation will be needed?

Responsible Parties:

required

- c. Grantee CAP Status - The user must select a CAP status; **Planned** or **Accomplished**.

CAP Status

Planned

Accomplished

- i. **Planned** - If the CAP Status selected is **Planned**, the user needs to enter the date of expected accomplishment ("Accomplish by When") and name of the responsible person ("Accomplish by Whom") for this CAP item.

CAP Status

Planned

Accomplished

Accomplish by When

mm/dd/yyyy

Accomplish by Whom

- ii. **Accomplished** - If the CAP Status selected is **Accomplished**, the user must enter the date accomplished (“Accomplished When”), person who accomplished the CAP task (“Accomplished by Whom”), and upload documentation to demonstrate that compliance has been achieved. If there are multiple actions for the CAP item, then the **Accomplished** status should only be selected if all actions are completed.

CAP Status

Planned

Accomplished

Accomplished When

mm/dd/yyyy

Accomplished by Whom

Please uploaded documentation

Choose File

Add additional files?

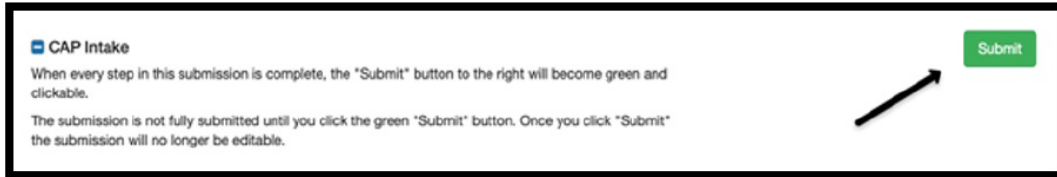
add additional files

- d. Once the User completes their CAP item(s), they will select the “Mark Complete” button.

Delete Save Draft **Mark Complete** Close

Note: A user cannot Mark Complete a CAP item until all required fields are completed.

- e. After the user completes all CAP items, they will submit their CAP document.

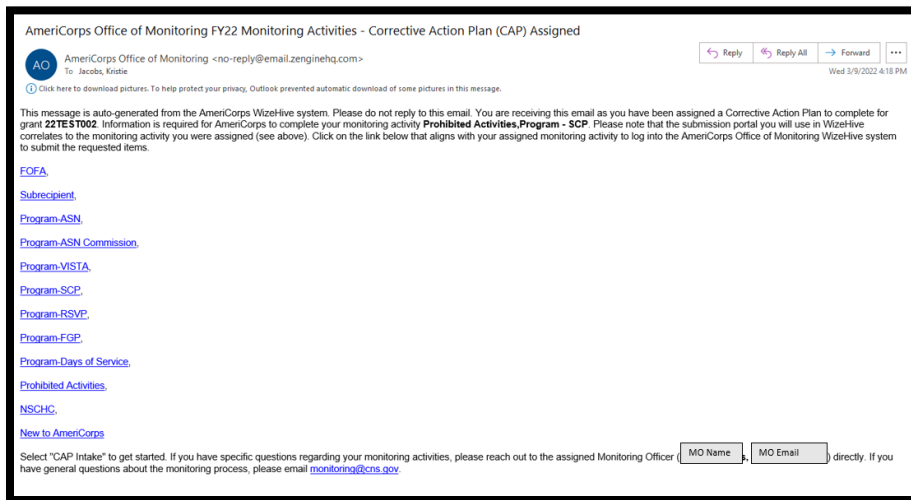


Grantee CAP Rework Required (If Applicable)

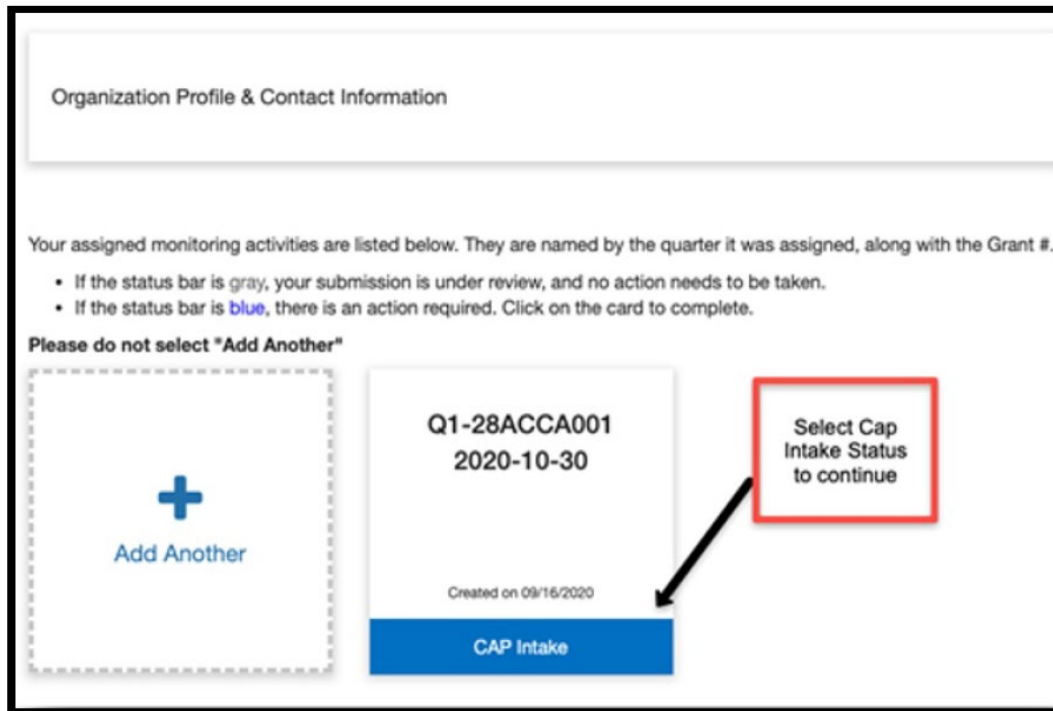
1. The user will receive an automatic email notification to return to the submission portal to review and update the CAP.

Please note that there are separate submission portals for WizeHive based on the monitoring activity user has been assigned. Please click on the submission portal link that aligns with the monitoring activity you have been assigned. Each Monitoring Activity has a different submission portal.

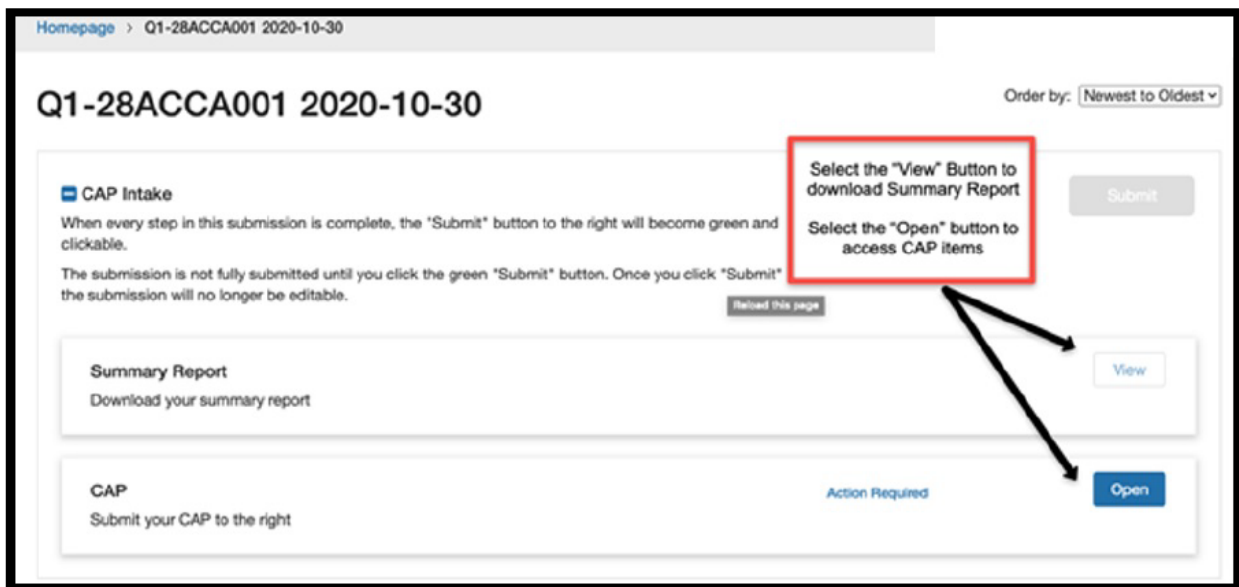
[FOFA](#), [Subrecipient](#), [Program-ASN](#), [Program-ASN Commission](#), [Program-VISTA](#), [Program-SCP](#), [Program-RSVP](#), [Program-FGP](#), [Program-Days of Service](#), [Prohibited Activities](#), [NSCHC](#), [New to AmeriCorps](#).



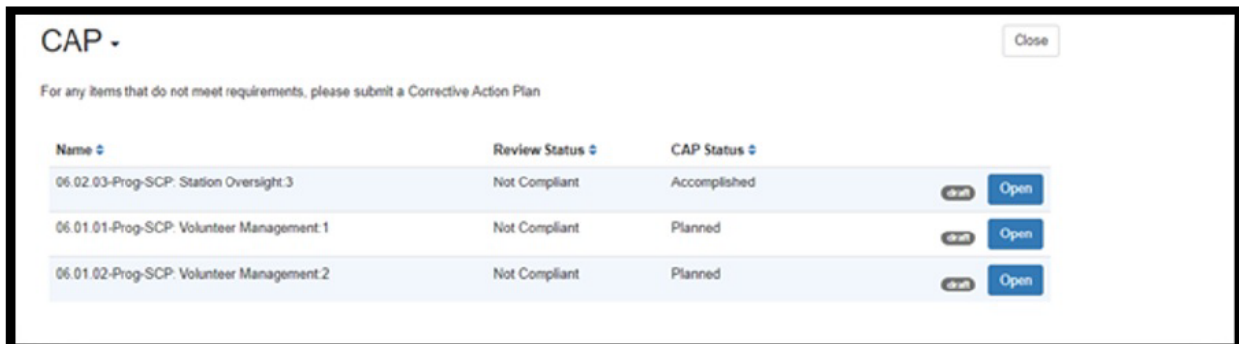
2. Upon logging in to the platform, the portal will look like the first time the user logged in. Click on the monitoring assignment in question.



3. The Summary Report will remain the same as the previous time the User logged into the Submission Portal. Click the "Open" button to review the CAP.



4. Upon clicking into the CAP, the user will see the list of CAP items that need to be reviewed for change requests. Click the "Open" button on the right side of the item to review and edit information.



5. Upon clicking into an item, the user will see the same information they saw during the original CAP Intake. Scroll down to the Monitoring Office CAP Review section to see the Monitoring Officer Notes related to the User's previous CAP response.

6. The user should again use the previously provided input fields to respond to the Monitoring Officer Notes to ensure that the CAP meets all requirements. Once the user finishes revising their CAP, they can select "Mark Complete" at the bottom.
7. Once all items are in the "Mark Complete" status, the user can click the close button in the top right of the CAP list.

Name	Review Status	CAP Status	
06.02.03-Prog-SCP: Station Oversight.3	Not Compliant	Accomplished	Edit
06.01.01-Prog-SCP: Volunteer Management.1	Not Compliant	Planned	Edit
06.01.02-Prog-SCP: Volunteer Management.2	Not Compliant	Planned	Edit

8. If all items are in the "Mark Complete" status, the user can select "Submit" on the Monitoring Activity summary page. This must then be selected to complete the document submission portion and make the documents ready for review.

000000-2025 Order by: [Newest to Oldest](#) ▼

CAP Intake [Submit](#)

When every step in this submission is complete, the "Submit" button to the right will become green and clickable.

The submission is not fully submitted until you click the green "Submit" button. Once you click "Submit" the submission will no longer be editable.

Summary Report [View](#)

Download your summary report

CAP [Edit](#)

Submit your CAP to the right

Documentation Intake This has been submitted.

Thank you for submitting.

Your submission is now under review and you will be contacted if any additional information is needed.

Monitoring Activities Acknowledgment [View](#)

View and agree to monitoring activity requirements.

Documentation Needed [Open](#)

.....

Updated 3/22/2022