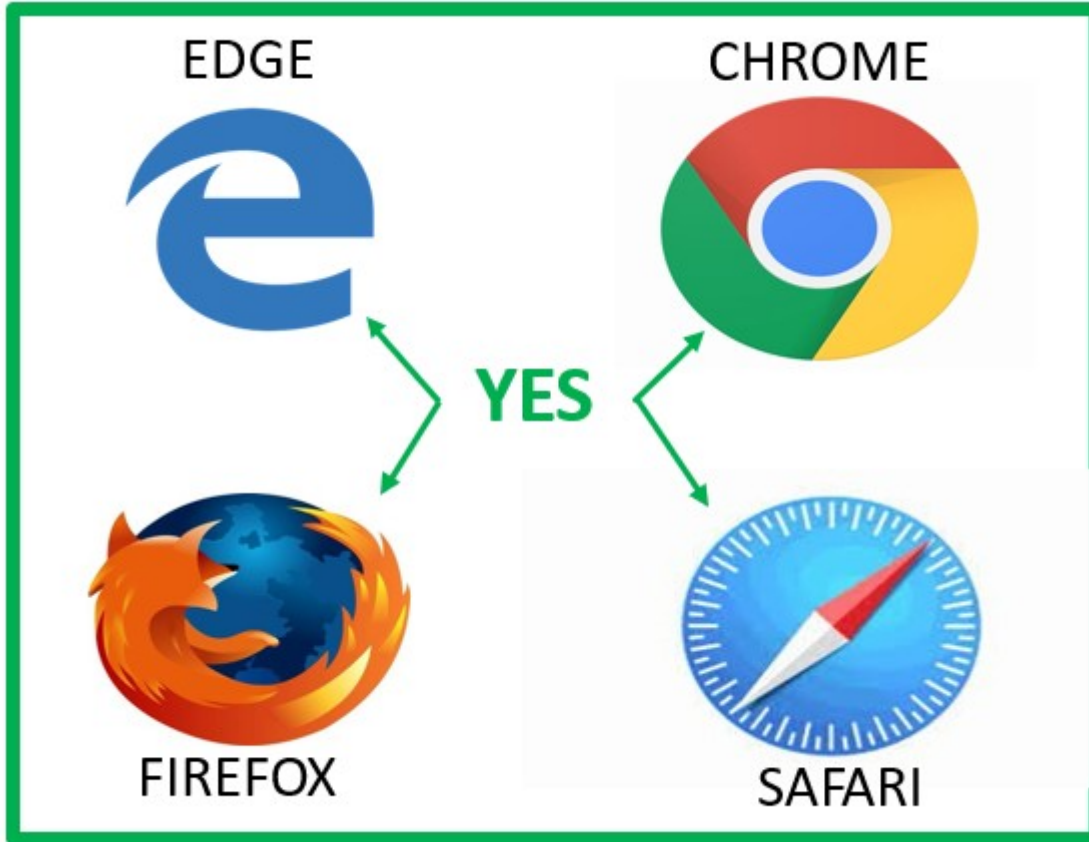


Navigating the Volunteer Portal

Libraries

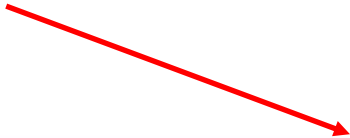
■ Browser Information



■ Logging into the Portal

The username and password used to log into AARP.org is the **same username and password you will use to access the Volunteer Portal**

**From the Home Page
choose the Libraries Tab**



Messages and Alerts

 Welcome!

Volunteer Links

-  [AARP.org Website](#)

-  [Inventory System](#)

-  [Submit A Request](#)

Overview

- All Tax-Aide Volunteers can currently access 17 Libraries
 - Libraries may be added and removed as updates are made for the new tax season and throughout the tax year
- Additional Libraries may be accessed depending upon their position.
- All volunteers can search for and download content from the libraries
- Volunteer Portal Library Section 13 has Tip Sheets with more Library information.

Prospective Volunteers

Once they attain Candidate status and are Sent Portal Invitation*, Prospective Volunteers can access the following 5 libraries:

- Prospective Volunteer Library (contains the parts of Training and Tax Law Library that they will need for Training)
- General Information
- Volunteer Portal
- Positions
- Learning Management System (LMS)

* Training?

Always comes up in Tile View

Libraries
6 items • Sorted by Last Activity

Tax-Aide: Training and Tax Law (NEW)

Tax-Aide: General Information

Tax-Aide: Technology

Tax-Aide: Position Information

Tax-Aide: Volunteer Portal

Tax-Aide: Tax Law and Training

DISPLAY AS

- ✓ Table
- Tile

To change to Table View, choose DISPLAY AS Table from Dropdown Menu

Table View

You can search for a subject using the global search box

Need Help?

Libraries

6 items • Sorted by Last Activity



Name

Last Activity



Tax-Aide: Training and Tax Law (NEW)

10/11/2019 12:13 PM



Tax-Aide: General Information

10/11/2019 9:56 AM



Tax-Aide: Technology

10/10/2019 10:59 AM



Tax-Aide: Position Information

4/30/2019 6:52 AM



Tax-Aide: Volunteer Portal

7/2/2018 9:08 AM



Tax-Aide: Tax Law and Training

5/27/2018 10:36 AM

Global Search – Policy & Procedures Manual

Search word input = Policy



Need Help?

- Home
- Contacts
- Manage Reimbursements
- Libraries
- Training
- Volunteer Hours
- Availability Calendar
- Site Calendar
- Locations

Search Results

Files

5+ Results • Sorted by Relevance ▼

[View More](#)

All

Contacts

Reimbursements

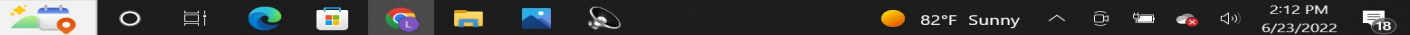
Files

Volunteer Events

Awards

TITLE	SIZE	FILE EXTENSION	LAST MODIFIED DATE	OWNER
Policy and Procedures Manual 2021-2022	1.2MB	pdf	6/21/2022 11:49 AM	Adam Dwoskin
2021-2022 Policy & Procedures List of Updates	117KB	pdf	11/19/2021 10:12 PM	Adam Dwoskin
H83_Networking Policy Changes FAQ	148KB	pdf	2/4/2022 4:51 PM	Jason Bochat
Policy & Procedures Reimbursement Addendum 2020-2021	107KB	pdf	4/23/2021 10:46 AM	Adam Dwoskin
AARP Tax Aide Policies & Procedures	2.1MB	pdf	11/19/2021 3:01 PM	Amy Hartleroad

Type here to search



You can sort files by clicking on any heading

Search Results

All

Files

Expand List

Refine By

Title

File Extension









Last Modified Date

Choose... ▼

Owner

Files

50+ Results • Sorted by Relevance ▼

TITLE	SIZE	FILE EXTENSION	LAST MODIFIED DATE	OWNER
 Policy and Procedures Manual 2019-2020	1.9MB	pdf	9/30/2019 1:57 PM	Adam Dwoskin
 Policies and Procedures 2019	2.2MB	pptx	9/24/2019 9:12 PM	Michelle Kasch
 Overview of Setup Guides for Tax-Aide TY18	367KB	pdf	9/25/2019 1:41 PM	Tim Noonan
 Policies and Procedures Review TY18	1.4MB	pptx	10/11/2019 12:08 PM	Roman Corpuz
 Policy and Procedures Manual Group 3 questions and a...	16KB	docx	9/24/2019 9:12 PM	Michelle Kasch
 Policy and Procedures Manual Group 1 Q&A	15KB	docx	9/24/2019 9:12 PM	Michelle Kasch
 Policy and Procedures Manual Group 2 Q&A	16KB	docx	9/24/2019 9:12 PM	Michelle Kasch
 NTTC Training Guide TY2019	3MB	pdf	9/24/2019 9:24 PM	Roman Corpuz

You can further refine your search by Title, File Extension (pdf, ppt, doc) and/or Last Modified Date

Search Results

All

Files

Expand List

Refine By

Title

File Extension









Last Modified Date

Choose... ▼

Owner

Files

50+ Results • Sorted by Relevance ▼

TITLE	SIZE	FILE EXTENSION	LAST MODIFIED DATE	OWNER
 Policy and Procedures Manual 2019-2020	1.9MB	pdf	9/30/2019 1:57 PM	Adam Dwoskin
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 NTTC Training Guide TY2019	3MB	pdf	9/24/2019 9:24 PM	Roman Corpuz

Click on document you want to view

Search Results

All

Files

Expand List

Refine By

Title

File Extension









Last Modified Date

Choose... ▼

Owner

Files

50+ Results • Sorted by Relevance ▼

TITLE	SIZE	FILE EXTENSION	LAST MODIFIED DATE	OWNER
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 NTTC Training Guide TY2019	3MB	pdf	9/24/2019 9:24 PM	Roman Corpuz

Working with a Library File

When the file is identified, click on the blue link to open to Preview. You can then also click Download to be able to print or to save to forward to others.

The screenshot displays a library interface with a file list and a preview window. The file list has columns for TITLE, SIZE, FILE EXTENSION, LAST MODIFIED DATE, and OWNER. The preview window shows the title 'AARP FOUNDATION TAX-AIDE' and the main title 'The Policy and Procedures Manual of Tax-Aide'.

TITLE	SIZE	FILE EXTENSION	LAST MODIFIED DATE	OWNER
Policy and Procedures Manual 2021-2022			11/19/2021 11:49 AM	Adam Dwoskin
			11/19/2021 10:12 PM	Adam Dwoskin
			11/19/2021 11:49 AM	Jason Bochat
			11/19/2021 11:46 AM	Adam Dwoskin
			11/19/2021 11:01 PM	Amy Hartleroad
			11/19/2021 11:02 PM	Amy Hartleroad
			11/19/2021 11:01 AM	DEBORAH TURNER

AARP FOUNDATION TAX-AIDE

The Policy and Procedures Manual of Tax-Aide

Working with a Library File

Click on File details to see what Library that file is stored in and when it was last updated.

Size	File Extension	Owner
1.2MB	pdf	Adam Dwoskin

PREVIEW DETAILS

AARP FOUNDATION TAX-AIDE

The Policy and Procedures Manual of Tax-Aide

2021-2022

Shared with (1) ▼

Tax-Aide: General Information
Set by Library

[View All](#)

Versions (3+) ▼

Version 19
Adam Dwoskin | 6/21/2022 11:49 AM
• 3.7.2- Aligned LMS policy to reflect that all current volunteers wit...

Version 18



+ Follow

Download

Size	File Extension	Owner
1.9MB	pdf	Adam Dwoskin

Click on the "+ Follow" button to receive email notifications when updates are made

File Detail

PREVIEW

DETAILS

Title
Policy and Procedures Manual 2019-2020

Description

Custom Tag
Policies & Procedures, Policies and Procedures, Policy & Procedures

Tags
Policies & Procedures, Policies and Procedures, Policy and Procedures

Language
English

Owner
 [Adam Dwoskin](#)

Follow feature is not working presently

Shared with (1)

Tax-Aide: General Information
Set by Library

[View All](#)

Versions (3+)

Version 11
Adam Dwoskin | 9/30/2019 1:57 PM
• 10.3.6- Hotel contracts that are \$10k and higher, require ...

Version 10
Kenny Wright | 9/24/2019 8:12 PM
Annual laptop reimage information updated.

Version 9
Adam Dwoskin | 2/28/2019 1:42 PM
Needed updated to chapter 8

[View All](#)

Locating Information in Libraries using Table of Contents and Updates

Tax-Aide: Volunteer Portal Library Additions and Updates

This log lists the updates to the **Volunteer Portal - New Library** with the most recent listed first. There is also a separate **Guide to Volunteer Library Tip Sheets** (or Table of Contents) showing all Tip Sheets by Section.

National Operations Committee (NOC)

New/Updated	Tip Sheet/Document/File Title	Sub-Folder	Date
New	VP14 How to Submit a Request	14 Appendix	2021, 12 14
Updated	VP07 Updating Program Location Information	07 Site Management	2021 12 07
Updated	Managing a Site Locator Entry	07 Site Management	2021 12 07
Updated	VP01 Update Your Portal Email Address	01 Accessing the Volunteer Portal	2021, 12 01
Updated	VP01 Change your Portal Password	01 Accessing the Volunteer Portal	2021, 12 01
New	VP05 - Minimum certification Requirements by Position	05 Certification	2021, 11 19
New	VP07 Updating Site Service Types	07 Site Management	2021, 11 09
New	VP03 Volunteer through AARP.org link	03 Recruitment	2021,11 05
Updated	VP03 Tax-Aide Application	03 Recruitment	2021,11 05
Deleted	VP03 Volunteer Interest Form	03 Recruitment	2021, 10 04
Updated	Portal Training Videos - How to Complete/Submit Mass Approval Reimbursements (NEW)	Tax-Aide Volunteer Portal Library: Portal Training Videos	2021, 10 01
Deleted	VP13 - Following Content In Libraries	13 Libraries	2021, 09 30
Deleted	VP03 Volunteer Wizard	03 Recruitment	2021, 09 30
Deleted	VP03 Volunteer Opportunity Board	03 Recruitment	2021, 09 30

In the Portal Library these are found in VP00 Locating Tip Sheets

Volunteer Portal Library has 21 Subfolders

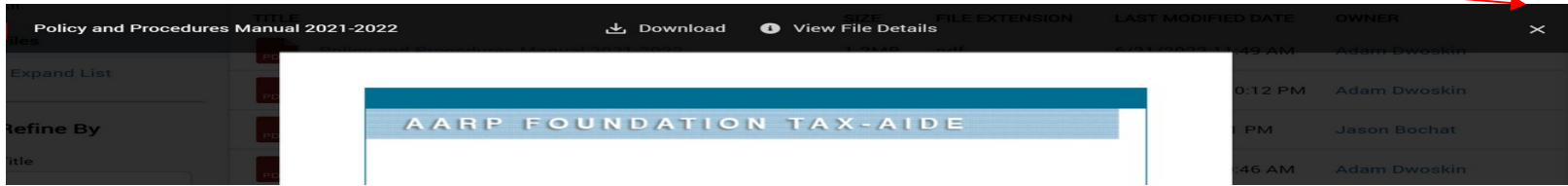
Sub-Folder	Description
00 Locating Tip Sheets	Guide to Tip Sheets (Table of Contents, Updates)
01 Accessing the Volunteer Portal	Portal Access, Email Update
03 Recruitment	Applications
04 Prospective Volunteer Processing	
05 Certification	
06 Volunteer Management	Volunteer Assignments
07 Site Management	
08 Program Metrics	
09 Reimbursements	
10 Volunteer Hours	Optional
11 Material Ordering	
12 Service Awards	
13 Libraries	
14 Appendix	
Portal Short Cuts	
Portal Training Videos	
Session Management	
Volunteer Portal FAQs	All Tip Sheets and Videos

Learning Management System (LMS) Libraries

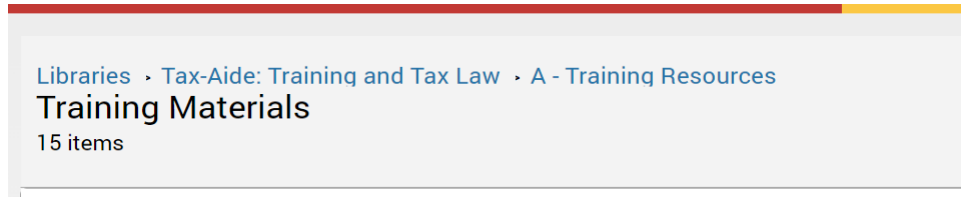
- The Learning Management System (LMS) Library contains LMS resource information for all volunteers including LMS Tip Sheets
- The Season Volunteer Registration Form SmartSheet Submissions shows the submissions of the Smartsheet registration form by those volunteers without computer/Portal access. It is a separate library only accessed by certain leaders.

Navigating in the Libraries

- When done previewing a file use the x in the upper right-hand corner to close the file and return to your previous window:



- When you are several subfolders down in a Library you can use the blue link “breadcrumbs” in the upper left-hand corner to quickly go back as many levels as you wish.



Questions?

