

Prospective Volunteer Activities

Prospects

All Prospective volunteers must register in the portal without exception

- Prospect must provide a valid e-mail address
 - E-mail address must be **UNIQUE**
 - @aarpfoundation.org is **NOT VALID**
- Prospect name must **MATCH** their photo ID

Apply at:

<http://www.aarpfoundation.org/taxaidevolunteer>

Prospect to Candidate

- AZ Prospective Volunteer Specialist (PVS) makes initial contact with prospects shortly after their application appears in the portal
- Prospect record is updated to reflect the initial contact which can include changing their status and annotating e-mails and phone calls
- AZ's PVS is **Cristine Kline (480) 313-1123 or aarp.aztaxaidespecialist@gmail.com**
- Only Volunteers in the portal with a Candidate – Under Consideration status can
 - Attend Orientation & Training
 - Be provided AARP Training materials including AZ website access

Prospects to Candidates


- Access PVS activity in AARP portal:
- 1 – Review Activity History
 - Right side of Contacts Record
- 2 – Review Activities – Email or Phone

Activity History (3)			
Subject	Task	Due Date	Assigned To
Email: AARP sti...	<input checked="" type="checkbox"/>	5/17/2022	Cristine Kline
Email: Thank yo...	<input checked="" type="checkbox"/>	5/11/2022	AEM AEM
Email: New Tax...	<input checked="" type="checkbox"/>	5/11/2022	AEM AEM

DETAIL **ACTIVITIES** CHATTER RECRUITING ACTIVITIES

Task Log a Call Event Email

Create new... Add


Filters: All time • All activities • All types 



Refresh • Expand All • View All

▼ Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

▼ May • 2022 4 Months Ago

>  AARP still wants you as a tax-aide...(this Fall 2022)
volportal@aarp.org sent an email to [Cynthia Smith](#) and 1 other

 Last opened Aug 30 11:42 AM | May 17 

District Responsibility

Prospect is now a Candidate – What’s next?

District Coordinator (or AC) Responsibility

- Prospects – Candidate with a status of “**Under Consideration**” should be contacted by DC/AC to discuss orientation/training schedule
- Prospects – On Hold from prior year should be contacted for a status update
- Volunteers on Leave of Absence (LOA) should be contacted for a status update
- Send status updates to AZ ADS – Michelle Kaplan at kaplanmw@gmail.com
- Remember to add a **NOTE** to document all communications
- Ensure Prospect name **MATCHES** their photo ID to prevent a problem later

Candidate Update

Update Candidate Record

Assignment Status must be updated

Candidates not completing training/certification must be moved to “On Hold” or “No Match”

Notify AZ ADS and include:
Volunteer Name, Vol ID#, and Status

AZ ADS is **Michelle Kaplan (408) 805-0167**
Kaplanmw@gmail.com

Add a NOTE to document changes

PROGRAM ROUTE TO	STATUS ↑	P V C D
TA-R10-AZ1-D01 (5 records)	Under Consideration	
	Under Consideration	
	Under Consideration	
	Under Consideration	
	Under Consideration	

Candidate Update

Candidate to Volunteer

Candidates who complete training and will be certifying must be given an appropriate volunteer assignment by the AZ **ADS**

Notify ADS and include:

Volunteer Name, Vol ID#, Assignment(s) and site(s)

Goal: No “Prospect” or “Under Consideration” status remain in the Prospect report after January 31

REPORT
AZ1: Prospec

Total Records
85

PROGRAM ROUTE TO	STATUS ↑	P V C D
TA-R10-AZ1-D01 (5 records)	Under Consideration	
	Under Consideration	
	Under Consideration	
	Under Consideration	
	Under Consideration	

Candidate Update

ADS Responsibilities – Only the ADS makes these entries in the portal

- Volunteer Assignments
 - New Assignments
 - Assignment Changes
 - Ending Volunteer service (retiring, relocation, leave of absence)
 - Returning volunteer from Leave of Absence (LOA)
- Missing service time adjustments – with AARP or VITA

AARP Portal Problems

- Volunteers with @aarpfoundation.org as their email will NOT be able to create a Google Account to access a Chromebook
 - Change your email at Member Services
1 (866) 839-0463 (Mon – Fri 8 AM to 8 PM)
 - Only the volunteer can change their portal name or email address

Thank You for your leadership

It's your leadership through our
challenging times that makes a
big difference to the folks who
need our help the most

