

2023 ADS SMT Training

Volunteer Portal: Introduction and Overview

07| 17| 2023



Agenda

- Background
- Basics
- Home Page
- General Techniques
- Jargon / Connections
- Dashboards

SECTION 1

BACKGROUND

INTRODUCTION and BACKGROUND

- ADSs are the subject matter experts (Portal gurus)
 - Training covers steps that others will do
 - You train, assist, monitor, (nag)
 - Attitude is contagious; be positive!
-
- Used by all AARP Foundation programs; not just Tax-Aide
 - Five-year project, rolled out in stages, beginning in 2015. Major revision in 2019
 - Based on Salesforce
 - <https://volunteers.aarp.org> or <https://volunteer.aarp.org> (not directly from aarp.org)

BACKGROUND

Goal is to get the responsibility as close to the activity as possible

- Volunteer maintains personal data
- Local Coordinators maintain site and production information
- District Coordinators and Administration Coordinators maintain volunteer assignments
- Instructors, Training Coordinators and District Coordinators maintain certification records
- ADS deals with site changes, oversight, training

SECTION 2

BASICS

BASICS

- <https://volunteers.aarp.org> or <https://volunteer.aarp.org>
- Registration at aarp.org required (not membership)
- Requires unique personal email for each volunteer
- Same email and password for login as aarp.org
- First-time sign-in procedure (emailed Invitation)

BASICS – frequent confusion of multiple sign-ins

Volunteer Portal log-in – same email and password as aarp.org.

Chromebook log-in - #####@aarpfoundation.org uses Volunteer ID. Assigned by Tech at national level within a week of a new volunteer receiving a “real /site” assignment. Purged twice/year

TaxSlayer log-in – Specific to each particular site. Assigned by Admin for TaxSlayer software at each site.

VITA/TCE Central (IRS) – not connected to Portal or TaxSlayer

BASICS

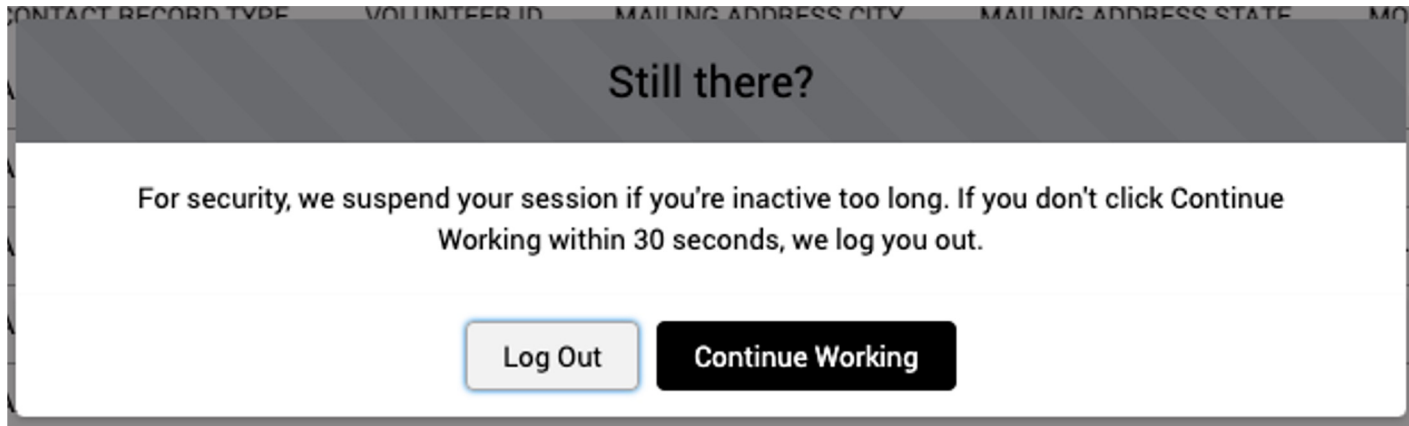
- Supported browsers: Google Chrome (preferred), Mozilla Firefox, Microsoft Edge, and Safari
- Pop-up blocker turned OFF
- Must have active Tax-Aide assignment – Volunteers who are “retired” or on “leave of Absence” cannot access. Also, prospects must be marked as “Candidate”
- Views and access privileges depend on assignment

BASICS

TA-R05-OH1-D10-S44051006 Counselor

- Tax-Aide
- Region
- Split state
- District
- Site Identification Number
- Position

BASICS – TIME OUT

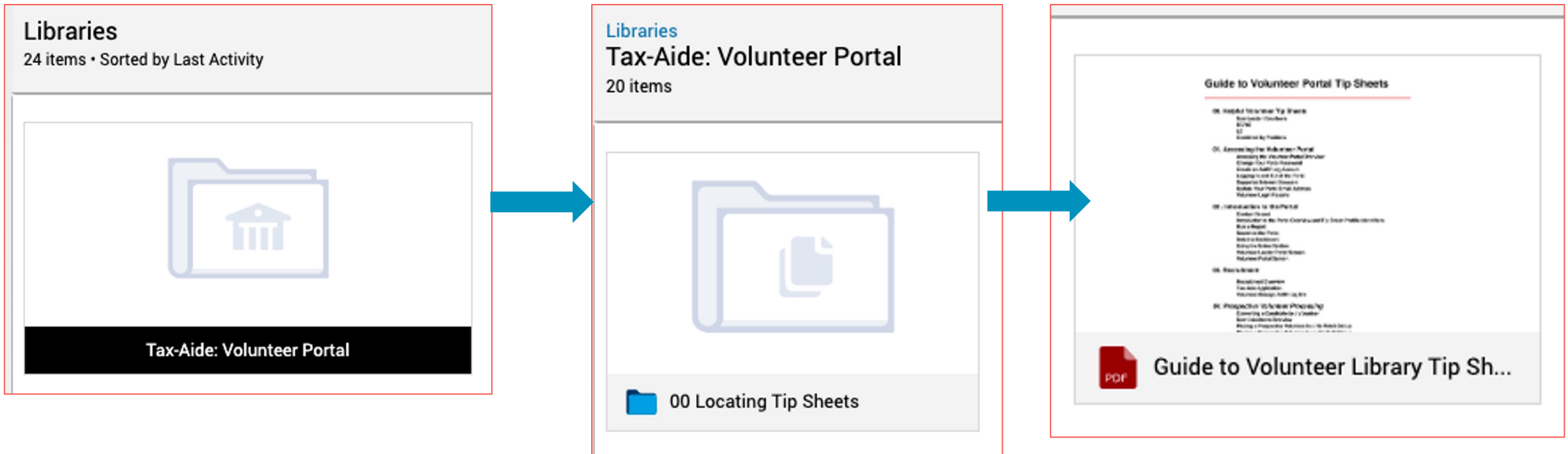


No results for "oh1 supervisor"

We searched the objects you use most and didn't find any matches for "oh1 supervisor".

BASICS – Instructions

- Located in the Tax-Aide: Volunteer Portal library
- We call them Tip Sheets
- Start with "Guide to Volunteer Portal Tip Sheets" (Table of Contents)



BASICS - INSTRUCTIONS

Tip sheets are posted in both .pdf and .doc formats



.doc is useful if you want to edit / adapt the instructions before sending them
.pdf format can be read by all, and not easily changed

BASICS - INSTRUCTIONS

See “Profiles by Role” in 14-Appendix of Volunteer Portal library



Codes in top right
corner of tip sheets

- P** Prospect – with “Candidate” Status
- V** Volunteer
- R** Volunteer Leader - Read Only
- E** Volunteer Leader – Edit (includes Volunteer Supervisor)

BASICS – Tip Sheets

Chart of Helpful Volunteer Portal Tip Sheets by Position

Libraries · Tax-Aide: Volunteer Portal
00 Locating Tip Sheets
3 items



Helpful Volunteer Portal Tip Shee...

Total Tip Sheets 90

Non-leader Volunteers 13

Dealing with Portal basics, maintaining personal information, submitting reimbursement requests, navigating Libraries

Local Coordinators 35

Above plus ordering Tax-Aide materials, maintaining site data, approving reimbursement requests

District and Administration Coordinators 70

Above plus entering certifications, maintaining Volunteer status, recruiting/onboarding prospects, reports

BASICS – Other Folders in Volunteer Portal Library

Not listed in the Guide to Volunteer Portal Tip Sheets



Portal Short Cuts



Portal Training Videos



Session Management



Volunteer Portal FAQs

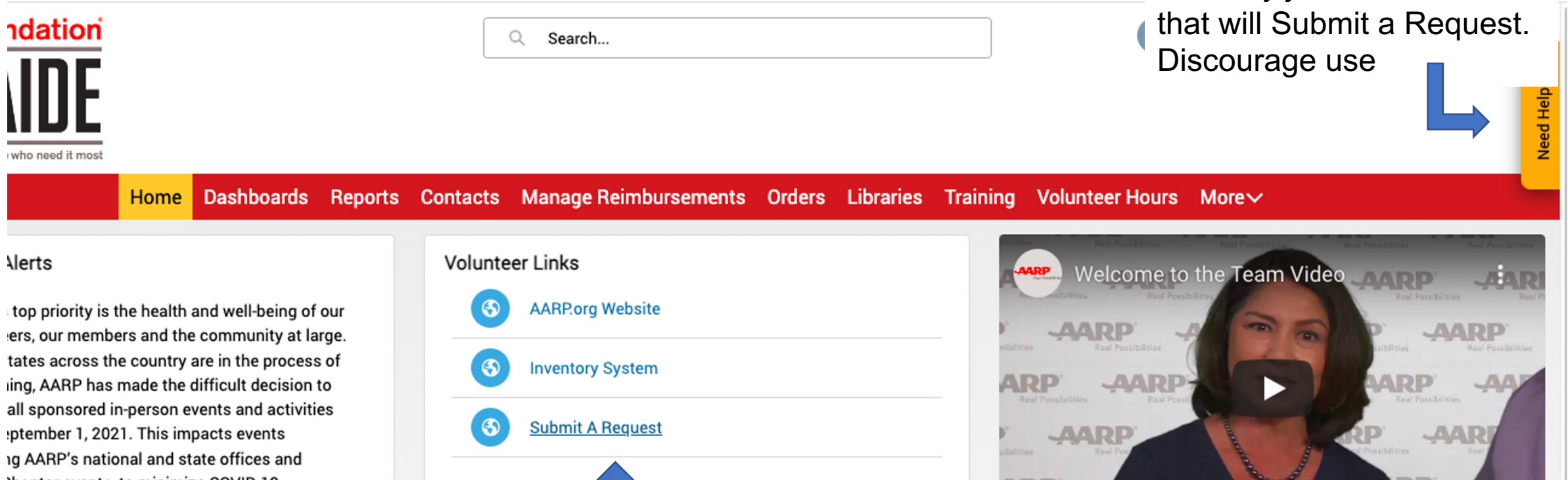


Volunteer Portal Zip Files

SECTION 4

HOME PAGE

MENU BAR – Home Page



Gold “Need Help” tab – currently just has an email that will Submit a Request. Discourage use

Alerts

Our top priority is the health and well-being of our members, our members and the community at large. As states across the country are in the process of reopening, AARP has made the difficult decision to suspend all sponsored in-person events and activities starting September 1, 2021. This impacts events at all AARP’s national and state offices and chapters.

- ### Volunteer Links
- [AARP.org Website](#)
 - [Inventory System](#)
 - [Submit A Request](#)



- Links: Inventory system (limited access); Submit a request;

MENU BAR – Home Page

The screenshot displays the top navigation area of the AARP Foundation Tax-Aide Volunteer Portal. On the left is the 'AARP Foundation TAX-AIDE' logo with the tagline 'we tax assistance for those who need it most'. The main navigation bar contains several elements: a 'Program Switcher' dropdown menu currently set to 'Tax Aide', a 'Global Search Box' (an empty search input field), and a 'Logout' link. On the right side, a user profile dropdown menu is open, showing the user's name 'VIVIAN JACKSON' and a list of navigation options: 'Home' (highlighted) and 'Logout'. Red arrows and boxes highlight the 'Program Switcher', 'Global Search Box', and the user profile dropdown menu. Below the main navigation bar is a secondary menu with links: 'Home', 'Dashboards', 'Reports', 'Contacts', 'Manage Reimbursements', 'Orders', 'Libraries', 'Training', 'Volunteer Hours', 'Program Volunteer', 'Awards', and 'More' (with a dropdown arrow).

Program switcher - Available to any volunteer who volunteers with multiple programs.

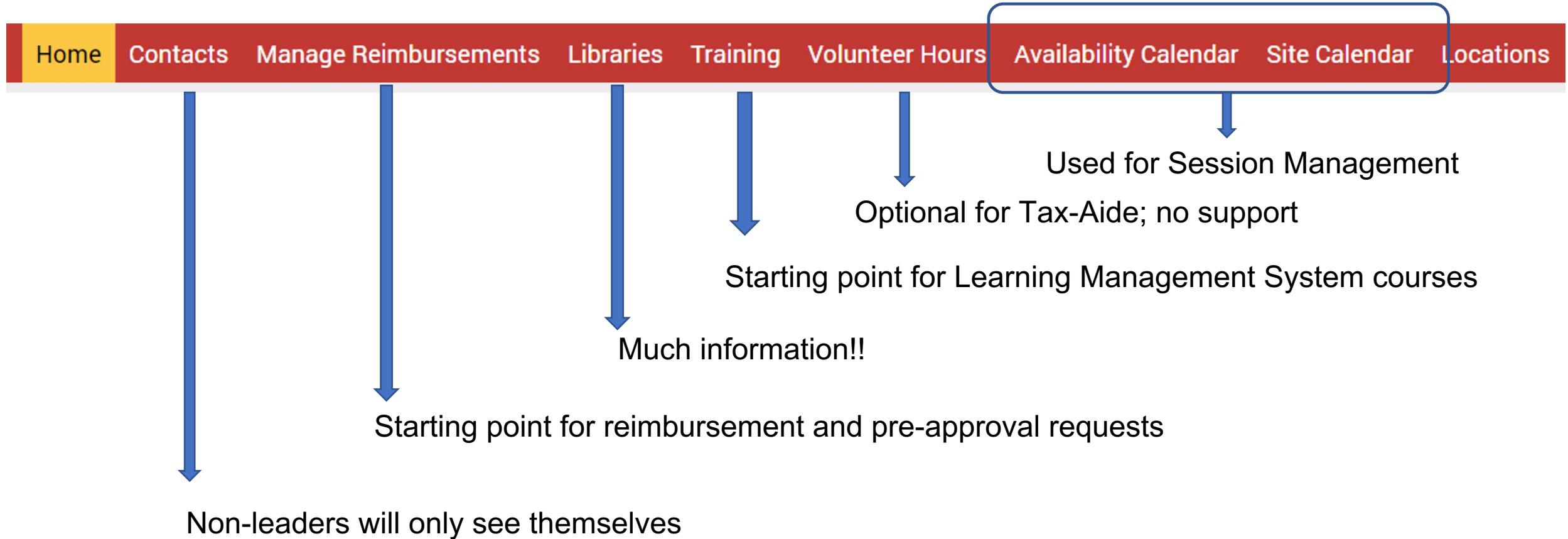
MENU BAR – Non-leader vs Leader

Remember when training and assisting volunteers:
Portal Access and Privileges vary based on Assignment

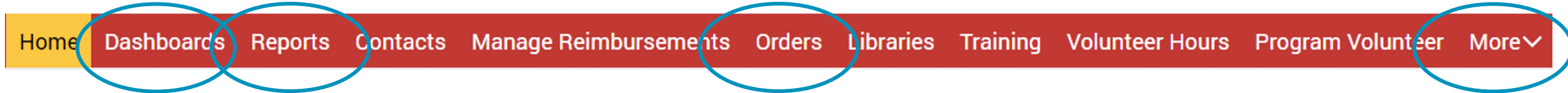
Non-leaders can:

- See and change only their own personal information
- Prepare and submit reimbursements
- See some Libraries
- See training materials
- Take LMS courses relevant to position
- Use some Session Management tools

MENU BAR – non –leader volunteer



MENU BAR –Leader



- **Orders** – Not going to cover; See Section 11 Tip Sheets
- **Reports** - Carmen will cover later
- **Dashboards**
 - Useful starting points to access reports
 - Can be filtered by districts
 - Train new leaders

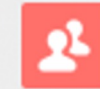
SECTION 3

GENERAL TECHNIQUES

GENERAL TECHNIQUES – NAVIGATING

Navigation:

- Menu bar
- Search
- All blue entries are live links
- Browser back button
- Crumb trail



Program Volunteer
Vivian Jackson

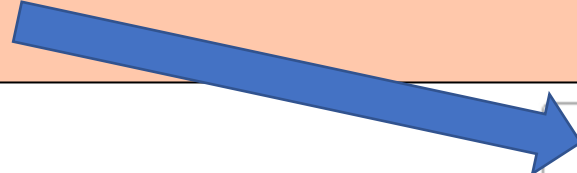
Reports

All Folders > Tax-Aide

[Libraries](#) • [Tax-Aide: Training and Tax Law](#) • [A - Training Resources](#)
Training Materials

GENERAL TECHNIQUES - SEARCH

Global Search



AARP Foundation
TAX-AIDE
Free tax assistance for those who need it most

Search...

List view Search



Home Dashboards **Reports** Contacts Manage Reimbursements Training Volunteer Hours More

Reports
Recent
12 items

Search recent reports...

GENERAL TECHNIQUES – SEARCH

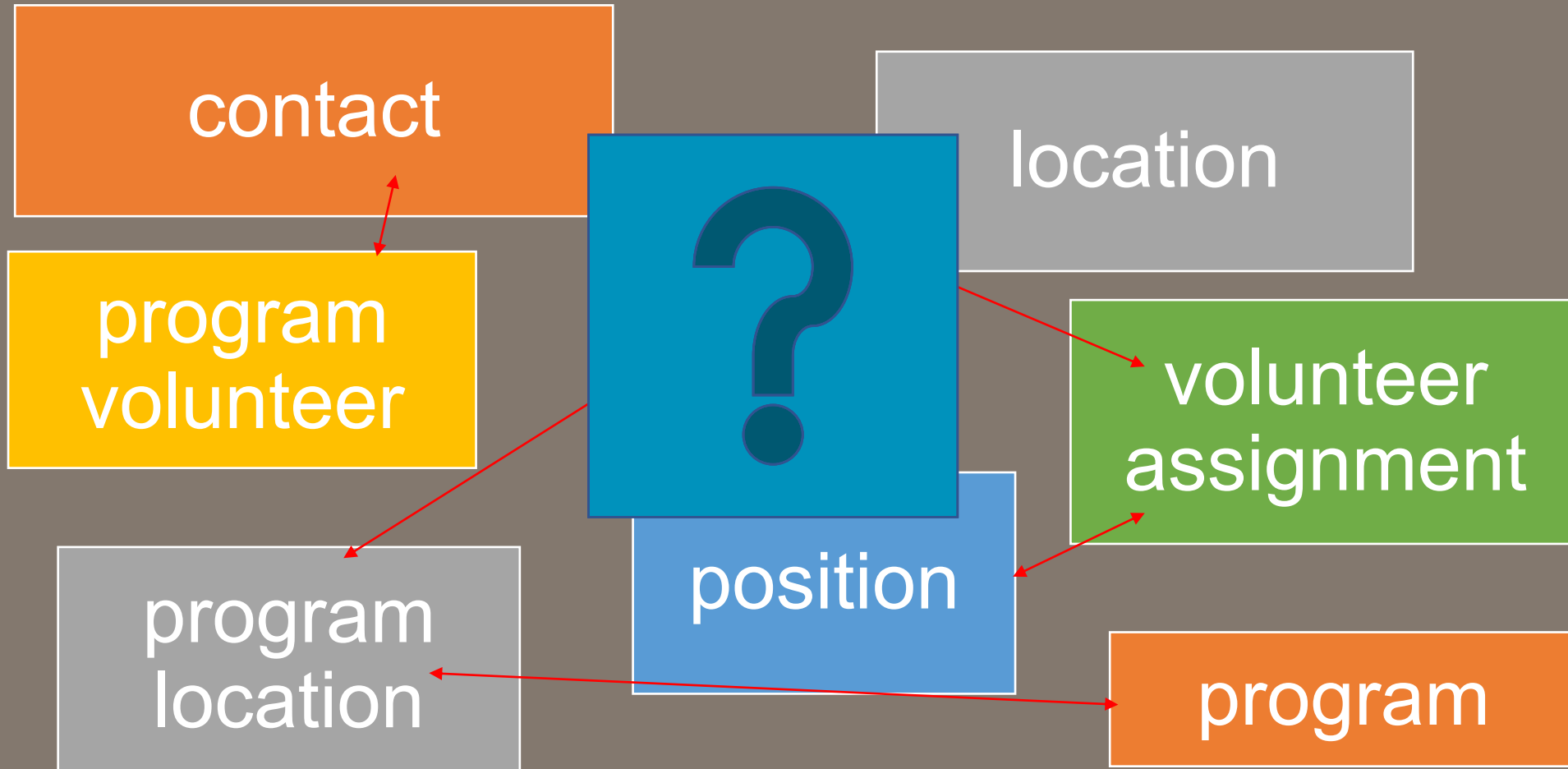
- Tip Sheets 02 “Search in the Portal” and 13 “Searching for Content in the Libraries”
- * is a wild card Ex. Search for “Hans*” will find either Hansen or Hanson
- ? Can be used for one unknown character - Hans?n
- Global search results can be limited/ refined in left sidebar

GENERAL TECHNIQUES – Find Contact Record

- Enter volunteer's name in global search box; then click on blue name in search results
- For common names – limit search by entering state or by using email, if known
- A non-leader will be able to find themselves by clicking on Contacts on the menu bar, then clicking on their name

SECTION 5

JARGON / CONNECTIONS



Organization of Volunteer and Site Information


The Type of Record and the corresponding icon is on top left of each record


 Contact
Vivian Jackson

 Program Volunteer
[Vivian Jackson](#)

 Volunteer Assignment
[Vivian Jackson](#)

 Location
TERRYVILLE PUBLIC LIBRARY

 Program Location
INACTIVE: TERRYVILLE PUBLIC LIBRARY

 Program
Tax-Aide

Program
TA-R01-CT1-D01-S10053056

Organization of Volunteer Information

Contact

Program

Program Volunteer



Contact

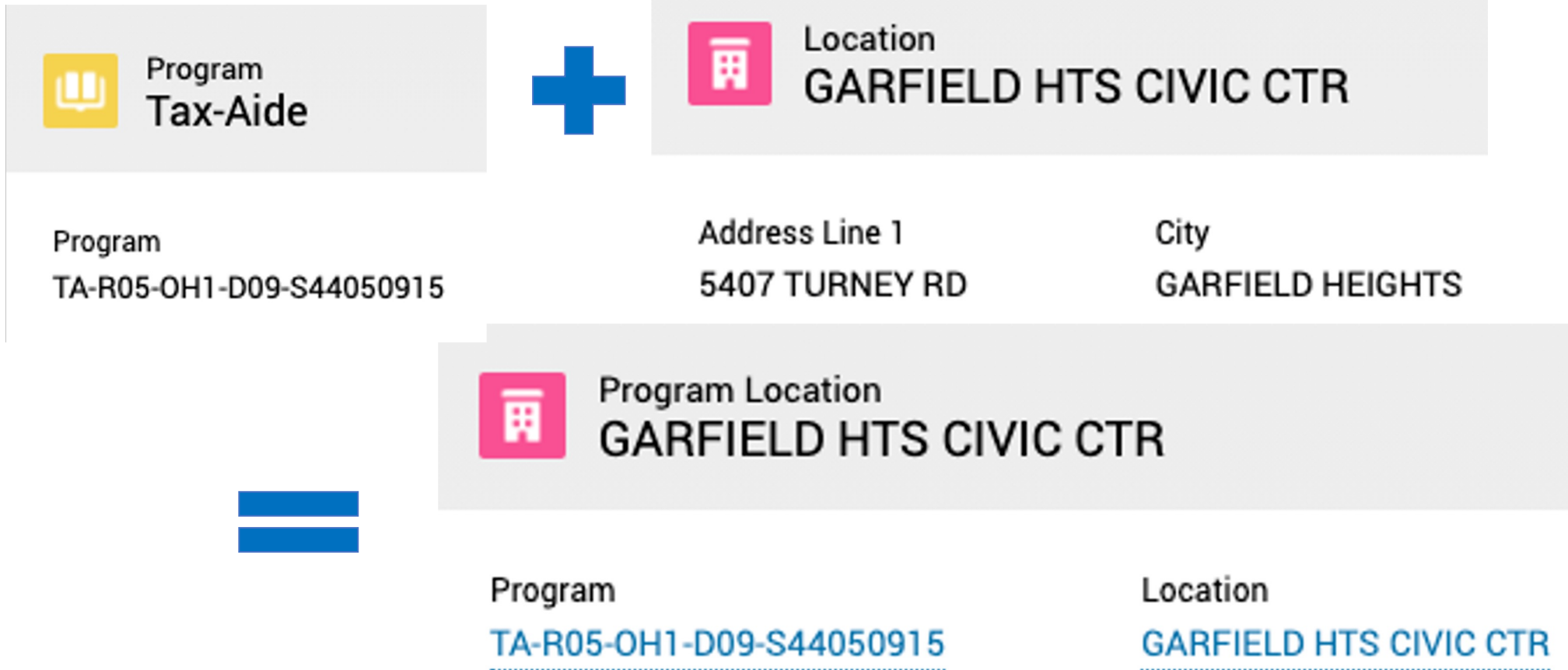
Position

Volunteer Assignment



Organization of Site Information

Program + Location = Program Location



SECTION 6

DASHBOARDS

MENU BAR –Dashboards

- Useful starting points to access reports
- Can be filtered by districts and/or other criteria
- Train new leaders (especially District and Administration Coordinators)
- To find (see Tip Sheet Section 2 "Select a Dashboard")
 - Type your split state in Global Search box
 - Using left sidebar, limit results to Dashboard
 - Select desired dashboard



MENU BAR –Selecting Dashboards

1. Enter Split State in Global Search box

2. Limit Results to Dashboards



Home Dashboards Reports Contacts Manage Reimbursements Orders Libraries Training Volunteer

3. Click blue link for desired dashboard

Search Results

All

Dashboards

[Expand List](#)

Refine By

Title

TITLE	DESCRIPTION
TA - R05 - OH1 - Certifications	
TA - R05 - OH1 - Prospects	This Dashboard includes a list of ALL Prospective Volunteers in Active, On
TA-R05-OH1 Session Management Dashboard	
TA - R05 - OH1 - Leaders	This Dashboard includes NO information on Reimbursements and is avail
TA - R05 - OH1- Supervisor	This Dashboard includes Reimbursement information and is available to S

MENU BAR – Available Dashboards

Dashboard	Reports
Leader	Volunteers, Sites
Supervisor	Volunteers, Sites, Pending Reimbursements
Prospects	Active, On Hold and No Match Prospects; Volunteers on Leave
Certification	Vol and PV Certification status; Summary of Certifications (Pie Chart)
Session Management	Appointments, Volunteer Availability, Shifts, Waitlist

MENU BAR – Dashboards

- Use Drop-down menu to filter for district
- Link for Report at bottom of each column

Dashboard
TA - R05 - OH1- Supervisor
This Dashboard includes Reimbursement information and is available to State Leaders that have Supervisory responsibility.
As of Jun 20, 2022 3:33 PM-Viewing as Robin Murphy

District

All

- ✓ All
- contains D01
- contains D02
- contains D03
- contains D04
- contains D05
- contains D06

Program: Parent Program ↑	Record Count
TA-R05-OH1-D01	6
TA-R05-OH1-D02	3
TA-R05-OH1-D03	5
TA-R05-OH1-D04	9
TA-R05-OH1-D05	7
TA-R05-OH1-D06	6
TA-R05-OH1-D09	13

[View Report \(TA - R05 - OH1 - Volunteers\)](#)

[View Report \(TA - R05 - OH1 - Sites\)](#)

REPORTS

- Lots of data. Many reports available.
A few used mostly by ADSs; most are useful to other leaders.
Reminder – you should know how to use and be able to train your leaders to use reports
- Today, limited to reports accessible via Dashboards
- More details on reports on Day #4.

- Volunteer Portal Library -> Tip sheet in Section 2 - “Run a Report”
- Volunteer Portal Library -> Tip sheet in Section 14 -”How to Filter Reports”

REPORTS - Finding

General Approaches

- Start from a Dashboard
- Use Global Search box
- Use the Reports tab

REPORTS – Exporting

REPORT TA - R07 - AL1 - Volunteers

Total Records 501

Click Export to Download Report

POSITION: PROGRAM	VOLUNTEER ID	LAST NAME	FIRST NAME	EMAIL	HOME PHONE	MOBILE	PHONE	OTHER PHONE	PREFERRED PHONE	POSITION: POSITION	POSITION: ROLE	STATUS	LAST LOGIN DATE
TA R07 AL1 (7 records)	6001									TA R07 AL1 Training Specialist	Training Specialist	Approved	9/24/2019
	5000						-	-	-	TA-R07-AL1 Assistant State Coordinator	Assistant State Coordinator	Approved	9/26/2019
	6000						-	-	-	TA R07 AL1 Partnership and Communication Specialist	Partnership and Communication Specialist	Approved	9/26/2019
	5000						-	-	-	TA-R07-AL1 Prospective Volunteer Specialist	Prospective Volunteer Specialist	Approved	9/26/2019
	04021						-	-	-	TA R07 AL1 Technology Specialist	Technology Specialist	Approved	9/23/2019
	50021						-	-	Home Phone	TA-R07-AL1 State Coordinator	State Coordinator	Approved	9/15/2019
	60021						-	-	Home Phone	TA-R07-AL1 Administration Specialist	Administration Specialist	Approved	9/26/2019

REPORTS – Exporting

Formatted Report will look like online report





Comma Delimited .csv is most flexible – can be saved in EXCEL or Sheets

The screenshot shows the 'Export' dialog box. The 'Export View' section contains two options: 'Formatted Report' and 'Details Only'. The 'Details Only' option is selected, indicated by a checkmark in the top right corner and a blue border. Below the 'Export View' section, there are two dropdown menus: 'Format' and 'Encoding'. The 'Format' dropdown is open, showing three options: 'Excel Format .xls' (selected), 'Excel Format .xlsx', and 'Comma Delimited .csv'. The 'Encoding' dropdown is set to 'ISO-8859-1 (General US & Western Europe)'. At the bottom of the dialog, there are two buttons: 'Cancel' and 'Export'.

Use “Details Only” if you plan to manipulate the report in EXCEL or Sheets

REPORTS – Exporting

Some exported reports are not named usefully. Consider renaming your download promptly.

 report1507465055126.csv	10/8/2017 8:17 AM
 report1507464904970.xls	10/8/2017 8:15 AM
 report1507464725640.xls	10/8/2017 8:12 AM
 report1507464441989.xls	10/8/2017 8:07 AM

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