

Certification



Updated 11/1/2024

DC and AC Portal Resource Guide

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Important Notes Before You Start

- If you have any questions, reach out to your ADS for clarification. Your ADS's job is to support you in administrative and Portal tasks
- All modules are located in one of two folders:
 - The .pdf versions are located in the Orange Volunteer Portal folder.
 - The PowerPoint versions are available to ADSs in the ADS folder.
- For more information on these topics, go to the Libraries tab and click on the orange Tip Sheet icon. Select the appropriate subfolder to locate the desired Tip Sheet
 - VP05 Tip Sheets in the portal library cover all certification requirements and procedures.
- You may see volunteers with other AARP Foundation programs in the Program Volunteer box and Assignments from these programs (i.e., Driver Safety, States, etc.). Do NOT do anything with these. Only work with the Tax-Aide program
- In the following slides, red arrows and boxes indicate items of interest and actions that should be taken
- Feedback – Please send any comments, corrections and suggestions for future topics using Submit A Request:
 - Select Operations; Operations Topic - Volunteer Portal and then Other



SECTION 1

Certification Overview

Certification Overview

See Tip Sheet VP05.01 – Certification Overview



The State Coordinator is responsible for establishing the process used to enter Certification information. Discuss the process in your split state with your SMT.

The ADS will monitor the overall process and provide assistance as needed or requested.

This module will cover areas needed to document volunteer certifications in the Tax-Aide program

Volunteer Certification – Policies and Procedures

See *current year Policies and Procedures Manual* (Libraries > Tax-Aide General Information > Policies and Procedures)

A volunteer is '**Certified**' only when all the certification requirements for their assignment(s) are **met** and have been properly **recorded** into the Portal

- Volunteers must certify annually for position(s) held
- Prospective volunteers cannot be given any position assignment until all required certifications are completed and recorded in their contact records
- All certification requirements must be met and recorded in the volunteer's Contact Record before any Tax-Aide work is done
- Completed Certifications are sent by National to the IRS
 - National Certification Reports are the official (and only) process to give IRS certification information on Volunteers. Saved in ADS Library

Certification Calendar Overview

Most tasks related to certification must be completed before the tax season commences. Others are done after the tax season begins

November – January - Focus on Training, Certification and Documenting results

- District Coordinators or designated volunteers enter certifications in the Portal
- ADS reviews certifications for errors, at least weekly, beginning mid-Jan
- Before February 1 - Update Contact Record for Volunteers and Prospects not certifying

February – March – Focus on Cleanup of outstanding issues

- Review Portal Reports and Certification Results Matrix (CRM) Report – published weekly
- Correct errors in certifications and end active assignments for those not certifying

April – Post-Season – Focus on entering late certifications prior to last transmission to IRS – usually mid-April

- Certification portal records are locked May 1

SECTION 2

Certification Requirements

Certification Requirements by Volunteer Role

See Tip Sheets and charts in VP05 Certification



Certification Requirements are subject to review and may change annually

- The authority for certification requirements is the Policy and Procedures manual

Documents in the VP05 folder provide a visual summary of the Policy and Procedures requirements:

- Simplified Certification Requirements
- Basic Certification Requirements
- LMS Minimum Certifications Required by Position
- IRS/Tax-Aide Minimum Certification Requirements by Position

Certification Requirements by Volunteer Role, cont'd

This chart summarizes the certification requirements** for site volunteers and those who support sites. Get current Tax Year chart from the Portal Tip Sheets VP05.

Certification Requirements for TY2024				
	CF	Coun	LC / SCO	Min*
Policy and Procedures***	X	X	X	X
Technology & Security***	X	X	X	X
Vol Std of Conduct	X	X	X	X
Intake/Interview & QR	X	X	X	
Advanced Test		X		
Proficiency Problems		X		
State Training		X		
Site Coordinator Training			X	
Site Coordinator Test			X	

Red = LMS

Black = Link & Learn

Blue = Local

*Min covers Support Facilitator, Technology Coordinator, Communications Coordinator and some other positions

**Missing LMS courses in the table:

- 1st year DC training
- 1st year Service Delivery Model training

***For TY24, **P&P** and **Tech & Security** LMS courses have a 'test-out' option available to those who have taken the actual full courses the previous year. Must pass the 10-question test with 80% or higher; not passing will require taking the regular course.

Certification Requirements by Volunteer Role, cont'd

This chart summarizes the number of certifications required by role. Get current Tax Year chart from the Portal Tip Sheets VP05.

Notes

- The six required certifications shown for a LC/SCO are for that specific role only. This will be seen when the LC is NOT also a Counselor.
- Note: a LC or SCO typically also certifies as a Counselor, thus requiring a total of nine certifications - seven for the Counselor role and two additional certifications for the LC/SCO role.
- Some states do not have a state income tax and therefore, no State Training requirement.

Certification Requirements for TY2024						
	Training & Testing Platform	Certification	Client Facilitator	Counselor	Local / Shift Coord	Min Required for all Volunteers
			CF	COU	LC/SCO	SF/TC/etc.
Minimum Certification Entries Required in the Volunteer Portal	L&L	02. VSOC Test	Y	Y	Y	Y
	LMS	03. Policy & Proc Training*	Y	Y	Y	Y
	L&L	04. I/I & QR Train & Test	Y	Y	Y	
	LMS	05. Site Coord Training			Y	
	L&L	06. Site Coord Test			Y	
	Local	07. Proficiency Problems		Y		
	L&L	08. Advance Test		Y		
	Local	16. State Training		Y		
	LMS	17. Technology & Security*	Y	Y	Y	Y
		Minimum Count		4	7	6

Other Required LMS Courses	LMS	Service Delivery Model Course - First Time SDM Being Used at Site and New Volunteers	Y1st	Y1st	Y1st	Y1st**
	LMS	District Coordinator Course				Required 1st Yr

* Test-Out module can be used if course completed in TY23. For others/New volunteers complete course is still required

** If using an SDM

Key:

Y = Required for Certification

Y1st = Required for First Use

SECTION 3

Entering Certifications

Entering Certifications in the Portal

See Tip Sheet VP05.02 – Documenting Certification



Who Can Enter and Document Volunteer Certification

The following volunteer positions **may** enter Certification information following the process established by the State Coordinator. Ensure those entering certification information are *properly trained* each tax year

- Administration Specialists
- Training Specialists
- District Coordinators
- Administration Coordinators
- Training Coordinators
- Instructors

Save the certification entries by clicking the **Update Certifications** button at the bottom of the screen.

A “**Success! certifications have been successfully updated**” verification message will appear at top of the section

Entering Certifications – Finding Bulk Edit Screen

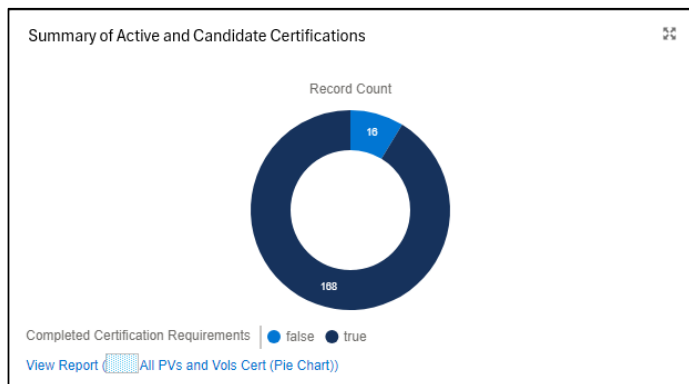
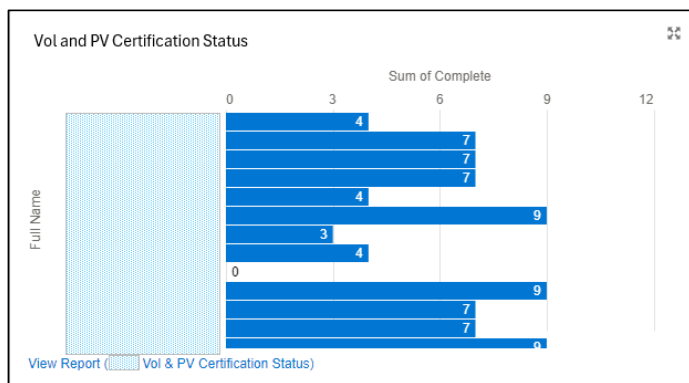
Two ways to Find Certification Bulk Edit Screen

See following slides for screenshots

- Use **Certifications Dashboard**
 - You may want to set the filter Certification Status = False to show only those whose Completed Certification Requirements box is not checked
 - Run the “Pie Chart” report at the bottom of report screen
 - In the resulting list, click the blue PVxxxxxxx number for the Volunteer/Prospect (use “Right Click” trick to open in a new tab – see next slide)
 - Scroll down to the bottom of page to “Certification Bulk Edit” screen
- Use volunteer’s **Contact Record**
 - Go to the 3rd box on right of screen (Program Volunteer box)
 - Click on blue PV number associated with the Tax-Aide Program
 - Scroll down to bottom of page to “Bulk Certification Record” section

Finding Bulk Edit Screen from Certifications Dashboard

These reports are filtered by Split State and can also be filtered by district



Getting to the Certification Dashboard:

1. Enter *split-state* followed by *cert* (e.g., *SSx cert*) in Global Search box.
2. Click on Dashboards in Search Results sidebar on left of screen.
3. Click on the Certifications dashboard you want (e.g., *TA-Rxx-SSx-Certifications* or *TA-Rxx-Certifications*).

Getting to the Bulk Edit screen by filtering the Dashboard:

1. The Dashboard can be filtered by Status, District, and/or Certification Status. Set desired filters before choosing report (see VP05.03 – Certification Reports).
2. Click the blue **View Report (All PVs & Vols Cert (Pie Chart))** link shown in lower screenshot.
3. In the resulting list, right click on Volunteer Program ID (PVxxxxxxxx) number.
4. Click “Open link in a new tab” in the dropdown box.
5. The new tab shows volunteer’s Program Volunteer Record.

Finding Bulk Edit Screen from a Contact Record



Search: vivian jackson

VIVIAN JACKSON

AARP Internal

- Home
- Dashboards
- Reports
- Contacts**
- Contacts
- Manage Reimbursements
- Orders
- Training
- Volunteer Hours
- Volunteer Events
- Awards
- Availability Calendar
- More

Contact: Vivian Jackson

+ Follow AARP Foundation Volunteer Waiver Case Printable View

Contact Record Type: AARP Volunteer Phone (2): Email: vivianjackson253@gmail.com Volunteer ID: 235117974 Konnex Person ID: V8cf33e4adacfbad3ec3b1fdffc0d1e68

- DETAIL**
- ACTIVITIES
- CHATTER
- RECRUITING ACTIVITIES

Form fields for contact details including Name, Email, Phone, and various IDs.

Volunteer Assignments (3)

Volunteer Assign...	Is Active	Position	Status
AS00766437	<input type="checkbox"/>	Prospective Volunt...	Approved
AS00766439	<input type="checkbox"/>	TA-R05-OH2-D11-S...	Approved
AS00766440	<input type="checkbox"/>	TA-R05-OH2-D11-S...	Approved

Addresses (1)

Address Line 1	City	State/Territory	Postal Code
601 E ST NW	WASHINGTON	DC	20049-0001

Program Volunteer (1)

Program Volunte...	Program	Status	Assignment Ended ...
PV00448295	Tax-Aide	Assignment Ended	Retired



Click on **blue PV number** in Program Volunteer box associated with the **Tax-Aide Program** to get to the Certifications Bulk Edit screen. Scroll down to the Certifications Bulk Edit section

Certification Bulk Edit Screen - Entries

Only authorized users can edit annual certification records on or after lockout date. Please contact an AARP staff-person for assistance.

Certification	Complete	State
01. IRS Employee	<input type="checkbox"/>	
02. Volunteer Standards of Conduct Test	<input checked="" type="checkbox"/>	
03. Policy and Procedures Training	<input checked="" type="checkbox"/>	
04. Intake/Interview and Quality Review Training and Test	<input checked="" type="checkbox"/>	
05. Site Coordinator Training	<input type="checkbox"/>	
06. Site Coordinator Test	<input type="checkbox"/>	
07. Proficiency Problems	<input checked="" type="checkbox"/>	
08. Advanced Test	<input checked="" type="checkbox"/>	
09. Qualified Experienced Volunteer	<input type="checkbox"/>	
10. Military	<input type="checkbox"/>	
11. Foreign Student	<input type="checkbox"/>	
12. International	<input type="checkbox"/>	
13. Puerto Rico 1	<input type="checkbox"/>	
14. Puerto Rico 2	<input type="checkbox"/>	
15. Volunteer Applying for CE Credits	<input type="checkbox"/>	
16. State Training	<input checked="" type="checkbox"/>	NC
17. Technology and Security	<input checked="" type="checkbox"/>	

Checkmark ALL **completed** certifications required for the volunteer's assignment(s). Note that different assignments have different required certifications.

Note: Some states do not have an income tax

Annual Certifications	Volunteer	Completed Certification Requirements	ID Verified	Date Certification Requirements Met and ID Verified	Lockout Date	Tax Year	Date Certification Data Was Entered
All		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Dec 31, 2023	2024-05-01	2023	Dec 31, 2023

Update Certifications

Note: Only after ALL specific certifications have been entered and ID is verified, **then** complete the 4 boxes at the bottom. Then click "Update Certifications".

Certifications Bulk Edit Screen - Entries, cont'd

Entering Certifications in the Certification Bulk Edit screen

- Enter a checkmark in each certification box ONLY if a specific certification is completed. Check completed certifications even if they are not a requirement for the specific position.
- Required *Learning Management System* (LMS) courses have their Bulk Certification Edit boxes autofill when volunteers complete an LMS course. Always check for these. If completed LMS courses do not autofill, contact your ADS for assistance.
- Certification check boxes may be updated and saved before all are completed. Be sure to click “Update Certifications” to save.
- **After** all appropriate certification boxes 2 to 17 have been checked, **only then** complete the Annual Certification line at the bottom of the Bulk Certification section.
- Click “Update Certifications” to save. Green “Success!” will show at top of section.

Note: Check the “Completed Certification Requirements” box at the bottom of the screen **only after ALL** required certifications in boxes 2 to 17 have been shown completed with checkmarks.

Mapping Certification Requirements to Bulk Edit Screen

The certification numbers in the table **match** the certification numbers in the portal Bulk Edit screen

Certification Requirements for TY2024

	Training & Testing Platform	Certification	Client Facilitator	Counselor	Local/Shift Coordinator	Min Required for all Volunteers
			CF	COU	LC/SCO	SF/TC/etc.
Minimum Certification Entries Required in the Volunteer Portal	L&L	02 VSOC Test	Y	Y	Y	Y
	LMS	03 Policy & Proc Trng	Y	Y	Y	Y
	L&L	04 I/I & QR Test	Y	Y	Y	
	LMS	05 Site Coord Training			Y	
	L&L	06 Site Coord Test			Y	
	Local	07 Proficiency Probs		Y		
	L&L	08 Advanced Test		Y		
	Local	16 State Training		Y		
LMS	17 Tech & Security Trng		Y	Y	Y	Y
Minimum Count			4	7	6	3

Other Required LMS Courses		1st Yr	1st Yr	1st Yr	1st Yr*
LMS	Service Delivery Model Course for 1st time SDM Being used at Site and New Volunteers				
LMS	District Coordinator Course				Required 1st Yr

As a helpful guide, the total number of required certifications for different Tax-Aide roles is shown in the table. Note some states do not have a state income tax.

Common Certification Errors & Omissions

- Bulk Edit Screen has **22** fillable boxes – use great care that all required boxes have entries
- Proficiency Problems not checked in Counselor certifications
- Specific state initials not entered in Counselor certifications
 - Note: Some states do not have an income tax and thus do not have a state certification requirement
- Volunteers certifying in multiple states missing one or more state initials
- “Completed Certification Requirements” box checked at bottom of screen, **but**
 - Checkmark(s) *missing* for required certifications in boxes 2 to 17
 - Checkmark(s) *incorrect* for required certifications in boxes 2 to 17
- Site Coordinator Test **and** Site Coordinator Training must be checked for LC and SCO positions

SECTION 4

Reviewing Certifications

Volunteer Certification Dashboards and Reports

See Tip Sheet VP05.03 Certification Reports



- Certification Dashboards and Reports provide information about volunteer certification status
- There are several reports containing information on volunteer certification
- Access certification information from the Certification Dashboard
 - Enter *split-state* followed by *cert* (e.g., *SSx cert*) in Global Search box
 - Click on Dashboards in Search Results sidebar on left of screen
 - Click on the Certifications dashboard you want (e.g., *TA-Rxx-SSx-Certifications*)
- Certifications Results Matrix (CRM)
 - Contact your ADS for assistance with this report
 - Available by region each Sunday starting in mid-January through mid-April
 - Regional report can be filtered by split-state and district

Certification Dashboard

Use **Split State Certification Dashboard** to view certification status

- Allows *filtering* by District, Volunteer Position, or Certification Status
- Click on **Dashboards** – select “TA - Rxx - SSx - Certifications” if in recent list
 - Can also use Global Search > “SSx” > Dashboards

The screenshot shows a dashboard titled "Dashboard TA - [redacted] - Certifications". It includes a "Refresh" button and a user view indicator "As of Jun 25, 2022 9:17 AM Viewing as Robin Murphy". Below the title are three filter dropdowns: "Status" (set to "All"), "District" (set to "contains D..."), and "Certification Status" (set to "All"). The dashboard contains two main sections: "WA1: Vol & PV Certification Status" with a bar chart showing a "Sum of Complete" value of 6, and "Summary of Active and Candidat..." with a "Record Count" section.

Certification Dashboard – Certification Status Report

The dashboard displays the following components:

- Filters:** Status (set to "Volunteer or Under Consideration"), District (set to "contains D..."), and Certification Status (set to "All").
- Legend:** False = Incomplete, True = Complete.
- Chart 1:** "Vol & PV Certification Status" (Horizontal Bar Chart) showing the sum of complete certifications for various full names. The y-axis is labeled "Full Name" and the x-axis is "Sum of Complete" (0 to 10). Data points include values of 6, 6, 6, 7, 5, 8, 5, 0, 5, 5, 9, and 5.
- Chart 2:** "Summary of Active and Candidat..." (Donut Chart) showing a record count of 50 (dark blue) and 5 (light blue).
- Legend for Chart 2:** Completed Certification Requirements (false).

Annotations and actions:

- A red box highlights "Volunteer or Under Consideration" with an arrow pointing to the Status filter.
- A red box highlights "False = Incomplete True = Complete" with an arrow pointing to the Certification Status filter.
- A red box highlights "Filter Charts and Reports by District" with an arrow pointing to the District filter.
- A red box highlights "To run report, click on 'View Report' at bottom of chart" with arrows pointing to the "View Report" links at the bottom of both charts.

SECTION 5

Certification Correcting and Cleanup

Certification Correcting and Cleanup Overview

See Tip Sheets VP05.03 - Certification Reports



The District Coordinator, Administration Coordinator, and ADS will monitor the certification process using the Certification Results Matrix report and Certification Dashboards and Reports.

The DC or AC, with the assistance of the ADS when needed, will correct errors and omissions in the portal to ensure the data are correct.

Certification Cleanup

Cleanup is done by District Leaders with support and reminders by ADS

- Initial cleanup should be done **before Feb 1**; Final clean up **before May 1**
- Correct errors on certified Volunteers – 100% complete and correct

Volunteers that do NOT certify – End **all** assignments

- End all assignments (by adding an end date, leave status = Approved)
- Set “Assignment Ended Reason” as “Retired” or “Leave of Absence”

Prospective Volunteers that do NOT certify – change status from Candidate to:

- On Hold – if they expect to volunteer next year
- No Match – if they will not be a volunteer / select “reason” from dropdown box

Volunteers changing assignments (COU > CF or CF > COU)

- Ensure that assignments match certifications

SECTION 6

Important Notice

Personally Identifiable Information

IMPORTANT!!

Volunteer information is private.

Leaders have access to volunteer's personal information for their area (district, etc.)

No volunteer information may be provided to any outside entity (including IRS SPEC) unless required and approved by National.

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