

# Contact Records



Updated 11/1/2024

**DC and AC Portal Resource Guide**

# Table of Contents

Topic	Slide Number
Important Notes Before You Start	3
Section 1 – Contact Record	4
Contact Record Overview	5
Contact Record Creation	6
How to Locate a Contact Record	7
Section 2 – Update the Contact Record	8
Contact Record - Left Side of Main Panel	9
Updating Contact Records	10
Mailing Address	11
Activities, Notes, Assignments	12
Other List Boxes	13
Program Volunteer Record	14
Common Errors	15
Section 3 – Important Notice	16
Personally Identifiable Information	17

# 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.
  - VP02 Tip Sheets in the portal library cover definitions for all fields in the Contact record.
- 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 Tax-Aide.
- In the following slides, blue arrows and boxes indicate fields 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

# Contact Record

# Contact Record Overview

## Contact Record – Information on a Volunteer

- Personal Information / Addresses /Phone
  - Volunteers should be encouraged to update their own Contact Records.
  - The information offered here is either for training or assisting those volunteers as needed. If necessary, DCs or ACs can update certain fields themselves.
- Volunteer Assignments
- Program Volunteer Record / Certifications
- Activity History / Notes / Contact History / Awards
- LMS Results

# Contact Record Creation

See Tip Sheets VP01.01 - Accessing the Volunteer Portal  
VP02.02 – Contact Record

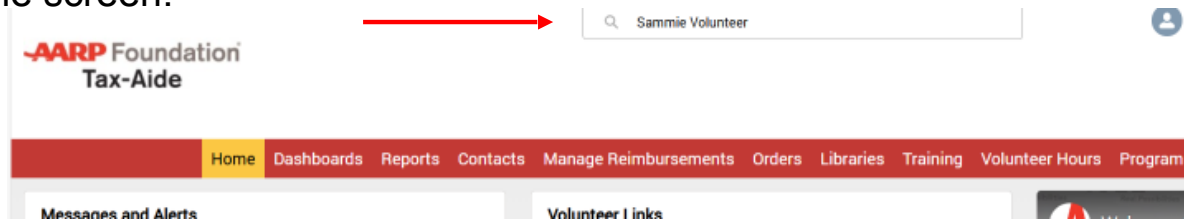


Contact Records are Created by a Tax-Aide Application

- Matched to the corresponding aarp.org record with the same email
- Name, email, and other information are synced with aarp.org periodically
- When an aarp.org record changes, the Portal contact record updates

## How to Locate a Contact Record

On the home page of the volunteer Portal, type the volunteer's name in the global search box at the top of the screen.



- The search will generate a list of volunteers.
- Click on the blue link name for the desired volunteer – verify the address or email address to be certain the correct volunteer is selected
- The link is to the volunteer's Contact Record on the portal

SECTION 2

# Update the Contact Record

# Contact Record - Left Side of Main Panel

Name should only be changed at **aarp.org**, NOT on the Portal

Email can only be changed at **aarp.org**, NOT on the portal

The screenshot shows a contact record for an 'AARP Volunteer'. At the top, there are tabs for 'DETAIL', 'ACTIVITIES', 'CHATTER', and 'RECRUITING ACTIVITIES', with 'DETAIL' selected. The record includes fields for Name, Nickname, Email, No Email Provided, AARP Membership Number, Volunteer ID, Full Name, Birthdate, Home Phone, Mobile, Other Phone, Preferred Phone, Active Positions (TA-R10-CA1-D29-S71051539 Counselor), Last Login Date (3/25/2024), Prospect Notification sent to DC/PVS?, and Emergency Contact Name. Each field has a small pencil icon to its right, indicating it is editable. The interface also shows a 'Contact Record Type' dropdown set to 'AARP Volunteer' and a 'Phone (2)' dropdown.

Click on pencil to open edit box for updating field

Phone Numbers can be edited here

Direct deposit info entered on this panel lower left. Can only be entered by volunteer.

## Updating Contact Records

See Tip Sheet VP02.02 Contact Record

See Tip Sheet VP01.05 Update Your Portal Email Address



Information that **CAN NOT** be updated directly on the Contact Record in the portal

- **Email Address – Can only be updated at aarp.org**
- **First and Last Name – update at aarp.org**

Other information that **can** and **should** be current and updated on the Portal by the volunteer with assistance from DC/AC as needed.

- Phone numbers – especially mobile phone field as applicable
- Mailing Address (required) and other addresses (Residential and Seasonal)
- Emergency Contact Information
- Direct Deposit information

## Mailing Address

The Mailing address is in a separate List Box on the right side

All volunteers are required to have their correct valid **Mailing** address in the Portal for purposes such as mailed reimbursements, awards and communications

To update a Volunteer's Mailing Address:

- Click "View all" in Address Box, then click Blue link for Mailing Address
- Next click **EDIT**, revise and save.
- Note **Mailing** addresses **cannot** be deleted

There are also additional "Address Type" entries available for:

- Seasonal Address - if this is used, it must be updated annually
- Residential Address – Needed for package delivery for those with PO Box in mailing address fields

# Activities, Notes, Assignments

## "Assignment" List Box –

- First List Box on the Right Side
- It contains all current and past AARP Foundation volunteer assignments
- This will be discussed in detail in the Working With Volunteer Records segment

**Activities** and **Notes** are used to document communications and Notes about or with Volunteers

See Tip Sheet VP02.06 Using the Notes Section

- "Activities" is found in the upper left section of Main Panel
- "Open Activities" and "Activity History" are found in right side list boxes.
- "Recruiting Activities" shows history of applications submitted.
- "New Note" is on the upper right corner of the screen.
- Past notes are found in the "Notes" list box on right hand side.



## Other List Boxes

### Awards

See Tip Sheet VP12 - Net Years vs Years of Service



- Do **not** use this section to determine if a volunteer received or is eligible for Milestone award.
- Net Years Served on Program Volunteer page is the basis for Years of Service (Milestone) awards.
  - Annual lists sent out by your ADS will show who is receiving or has received a Milestone award.
  - Errors or omissions should be brought to the attention of your ADS.

### LMS User Learning Path Results and User Program Results

- LMS course completion

## Program Volunteer Record

The “Program” is the AARP Foundation program with which this person volunteers.

“Program” may be for **Tax-Aide (TA)**, Drivers Safety (DS), States (ST), etc.

The Program Volunteer record contains that volunteer’s history within that particular program.

To access the record, click the blue PV##### link next to **Tax-Aide** in the Program Volunteer list box.

The Program Volunteer Record contains the following:

- Zip Code “Route To”, “Preferred Zip Code” and “Program Route To”
- Bulk Certification Entry
- Net Years Served, Years of Service and Program Start Date
- Program Volunteer History and Status History
- "Send Access Notification" (upper right) tab to generate portal access email to new volunteers



Program V...	Program	Status	Assignment ...
<a href="#">PV000####</a>	Tax-Aide	Volunteer	

View All

## Common Errors

An Error banner on a Volunteer's Contact Record

- **Red Banner** – Usually needs to be addressed with a “Submit a Request” Operations>Volunteer Portal>Other
  - Example: EMAIL ADDRESS IS OWNED AND REGISTERED ON aarp.org WITH A DIFFERENT NAME
  - Possible Cause: Changing Name in Portal, instead of in aarp.org. This results in a disconnect between records in the portal and in aarp.org
- If the **RED** Error is “Missing Mailing Address” or “Invalid Mailing Address”, the ADS will be able to resolve by retyping or correcting the address fields or using Submit A Request.
- **Orange Banner** – Usually indicates an incomplete action by DC or AC.
  - Reason for Assignment Ended not given
  - DC, AC or ADS should correct the error

SECTION 3

# 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.

**AARP Foundation**<sup>®</sup>  
For a future without senior poverty.