

# Prospective Volunteer Record Management



Updated 11/13/2024

**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. For the tasks in this module, your state's Prospective Volunteer Specialist may also assist. States may have different procedures.
- 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.
  - VP04 Tip Sheets in the portal library cover all Prospective Volunteer 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 Tax-Aide.
- In the following slides, blue ovals/arrows indicate where to look. Red indicates action that should be taken.
- Status of "On Hold" and "No Match" are used ONLY for Prospective Volunteers who have not yet completed certification.
- 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

# Volunteer Applications

## Tax-aid Application

See Tip Sheet VP03.02 – Tax-Aide Application



Interested persons should start here to submit an application:

[www.aarpfoundation.org/taxaidevolunteer](http://www.aarpfoundation.org/taxaidevolunteer)

The applicant will be directed to either sign in to their aarp.org account (if they already have one) or to create one as part of the application process.

AARP membership is not required.

## Application Issues and Backup Applications

If there are application issues (spinning circle or will not submit) – Prospect should try again the next day – the problem may clear up on its own.

If issues prevent completing the application process after a few tries, use these links – but ONLY as last resort:

- Applicant to enter on their own: [AARP Foundation Tax-Aide Prospective Volunteer Manual Entry Application](#)
- Volunteer Leader to enter on behalf of Applicant: [Leaders On Behalf Of PV Manual Entry](#)
- These applications are processed manually by Portal Staff and may take a week or more to show up in the Portal

## When NOT to Submit an Application

Volunteers and Prospects should NOT submit additional Applications. This often occurs when:

- Trying to change Portal email
  - See Tip Sheet VP01.05 – Update Your Portal Email
- Returning from Retired or Leave of Absence (LOA) Status
  - See Tip Sheet VP06.04 - Returning Retired or LOA Volunteers – Standard Process
  - and Tip Sheet VP06.05 - Returning Retired or LOA Volunteers – Expedited Process
- Transferring across Split States or Districts
  - See Tip Sheet V06.07- Transferring Volunteers Across Split States



## When a Person Applies to Tax-Aide

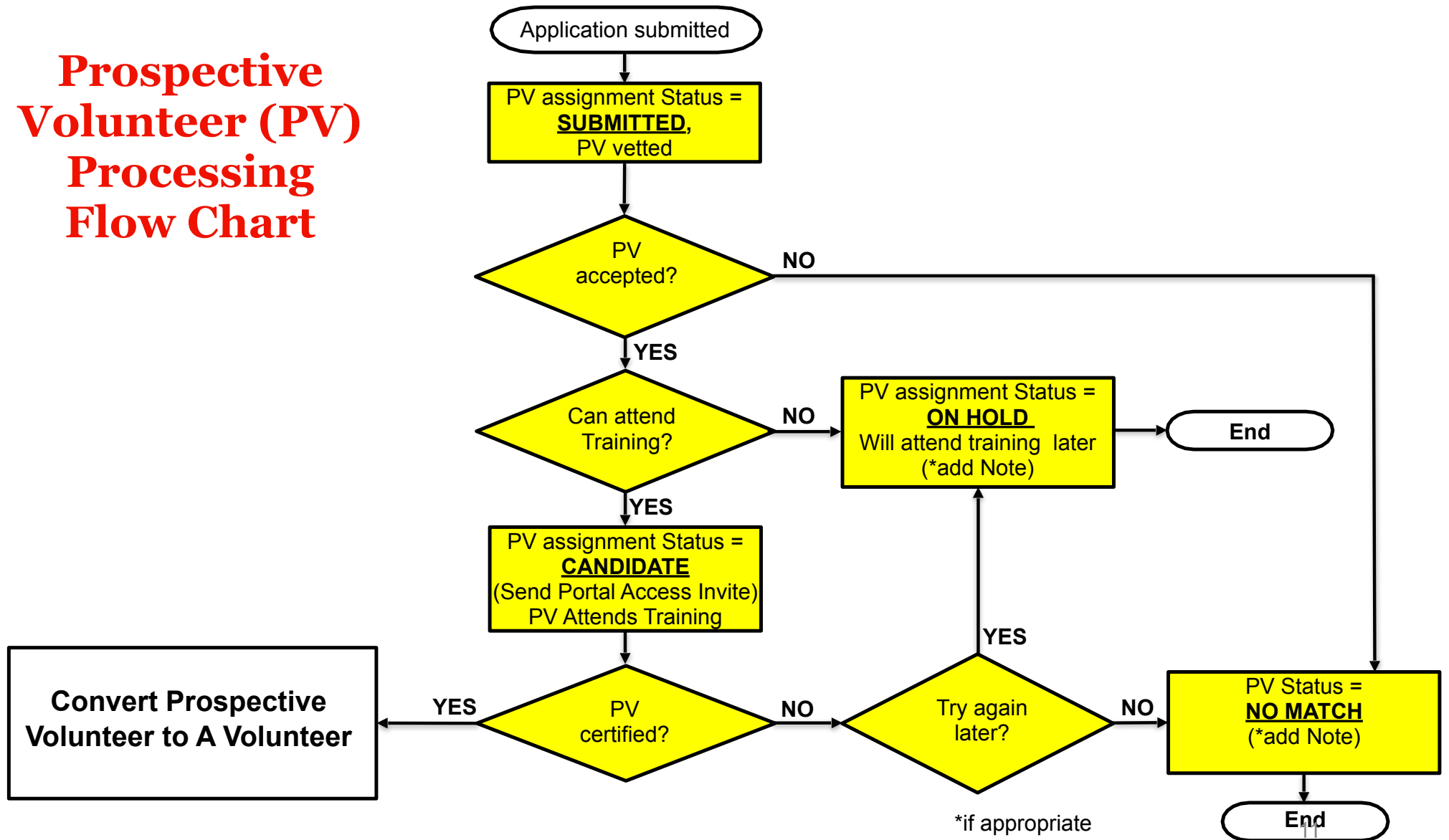
The Portal system automatically:

- Creates a Contact Record in the Portal with the Prospect's basic information
  - **Exception:** If the email used matches an existing Contact Record, a new "Recruitment Record" is added to the existing Contact Record
- Creates a Prospective Volunteer Assignment, Status = Submitted
- Routes (assigns) the Prospect to a District based on Zip Code
- Sends an email to the Prospective Volunteer Specialist (PVS) and the District Coordinator (DC)
- The PVS or the DC will contact the Prospect to discuss the Tax-Aide program and their possible participation

SECTION 2

# Prospective Volunteer Status Update

# Prospective Volunteer (PV) Processing Flow Chart



## Contact Record after Application

Volunteer Assignments (1)				New
Volunteer ...	Is Active	Position	Status	
<a href="#">AS007664...</a>	<input type="checkbox"/>	Prospective...	Submitted	▼
				<a href="#">View All</a>

Addresses (1)				New
Address L...	City	State/Territ...	Postal Code	
<a href="#">601 E ST ...</a>	WASHINGT...	DC	20049-0001	▼
				<a href="#">View All</a>

Program Volunteer (1)				New
Program V...	Program	Status	Assignmen...	
<a href="#">PV004482...</a>	Tax-Aide	Prospect		▼
				<a href="#">View All</a>

Volunteer Assignment:  
Position = Prospective Volunteer  
Status = *Submitted*

Program Volunteer  
Program = Tax-Aide  
Status = *Prospect*

# Change to No Match – No Future Interest

**To Change:**

See Tip Sheet VP04.08 – Placing a Prospective Volunteer in a No Match Status



Volunteer Assignments (1)				New
Volunteer ...	Is Active	Position	Status	
AS007664...	<input type="checkbox"/>	Prospective...	Submitted	▼
				View All

Addresses (1)				New
Address L...	City	State/Territ...	Postal Code	
601 E ST ...	WASHINGT...	DC	20049-0001	▼
				View All

Program Volunteer (1)				New
Program V...	Program	Status	Assignmen...	
PV004482...	Tax-Aide	Prospect	▼	
				View All

Edit

Edit AS00766437

\* = Required Information

\* Status  
Submitted  
View all dependencies

Candidate Duration ⓘ  
1

\* No Match Reason ⓘ  
--None--  
View all dependencies

Is Active  
  
*This field is calculated upon save*

Start Date ⓘ  
[Calendar icon]

End Date ⓘ

cancel Save & New **Save**

- None--
- Submitted
- Candidate
- Approved
- On Hold
- No Match**

- None--
- Stopped Responding or No Longer Interested
- Failed Background/Reference Check
- Did Not Complete/Pass Training or Certification
- Poor Communication Skills Displayed During Interview
- Not Interested without Compensation
- Does Not Meet Age Requirement
- No Position Currently Available
- Lacked Access to Technology
- Skills/Experience Do Not Match Volunteer Role

**Select best option**

## Change to No Match – No Future Interest, cont'd

**AFTER:**

Volunteer Assignments (1)				New
Volunteer ...	Is Active	Position	Status	
<a href="#">AS007664...</a>	<input type="checkbox"/>	Prospective...	No Match	▼
				<a href="#">View All</a>

Addresses (1)				New
Address L...	City	State/Territ...	Postal Code	
<a href="#">601 E ST ...</a>	WASHINGT...	DC	20049-0001	▼
				<a href="#">View All</a>

Program Volunteer (1)				New
Program V...	Program	Status	Assignmen...	
<a href="#">PV004482...</a>	Tax-Aide	Declined		▼
				<a href="#">View All</a>

Volunteer Assignment:

Position = Prospective Volunteer

Status = *No Match*

Program Volunteer

Program = Tax-Aide

Status = *Declined\**

\*Updates *automatically* when Prospective Volunteer Assignment status changed to No Match

Add a **Note** in Contact Record, if appropriate.

See Tip Sheet VP02.06 – Using the Notes Section



# Change to On Hold – Future Interest

**To Change:**

See VP04.07 – Placing a Prospective Volunteer in an On Hold Status



**Volunteer Assignments (1)** New

Volunteer ...	Is Active	Position	Status
<a href="#">AS007664...</a>	<input type="checkbox"/>	Prospective...	Submitted

[View All](#)

**Addresses (1)** New

Address L...	City	State/Territ...	Postal Code
<a href="#">601 E ST ...</a>	WASHINGT...	DC	20049-0001

[View All](#)

**Program Volunteer (1)** New

Program V...	Program	Status	Assignmen...
<a href="#">PV004482...</a>	Tax-Aide	Prospect	

[View All](#)

**Edit AS00766437** \* = Required Information

**\* Status**

Submitted

View all dependencies

**Candidate Duration** ⓘ

1

**No Match Reason** ⓘ

--None--

View all dependencies

**Is Active**

*This field is calculated upon save*

**Start Date** ⓘ

**End Date** ⓘ

**\* Status**

Submitted

--None--

Submitted

Candidate

Approved

**On Hold**

No Match

cancel

## Change to On Hold – Future Interest, cont'd

**AFTER:**

Volunteer Assignments (1)			
Volunteer A...	Is Active	Position	Status
<a href="#">AS00766437</a>	<input type="checkbox"/>	Prospective V...	On Hold

Addresses (1)			
Address Lin...	City	State/Territory	Postal Code
<a href="#">601 E ST NW</a>	WASHINGTON	DC	20049-0001

Program Volunteer (1)			
Program Vol...	Program	Status	Assignment E...
<a href="#">PV00448295</a>	Tax-Aide	Assignment E...	On Hold

Volunteer Assignment:

Position = Prospective Volunteer

Status = *On Hold*

Program Volunteer

Program = Tax-Aide

Status = *Assignment Ended\**

Assignment Ended Reason = *On Hold\**

\*Updates *automatically* when Prospective Volunteer Assignment status changed to On Hold

Add a **Note** in Contact Record, if appropriate.

See Tip Sheet VP02.06 – Using the Notes Section

## Change to Candidate – Good Fit!

At first contact, ask if the Prospect has a cell phone capable of sending/receiving text messages. If so, put that number in the Mobile Phone field of the Contact Record even if it is already in the “Other Phone” field.

This step will allow Technology staff to populate the recovery information of the Google account when it is created, ensuring an easier process to log into a Chromebook.

The image shows a comparison between two states of a contact record form. On the left, a list of phone fields includes 'Home Phone', 'Mobile', 'Other Phone' (containing '(123) 456-7890'), and 'Preferred Phone'. Each field has a pencil icon for editing. A red circle highlights the pencil icon for the 'Other Phone' field. A red arrow points from this icon to the right. On the right, the form is shown in an edit mode. The 'Home Phone' field is empty. The 'Mobile' field is highlighted with a blue border and contains the number '(123) 456-7890'. A red arrow points from the 'Mobile' field to a 'Save' button, which is circled in red.

# Change to Candidate – Good Fit!

**To Change:**

See Tip Sheet VP04.02 – Processing a Prospective Volunteer



**Volunteer Assignments (1)** New

Volunteer ...	Is Active	Position	Status
<a href="#">AS007664...</a>	<input type="checkbox"/>	Prospective...	Submitted

[View All](#)

**Addresses (1)** New

Address L...	City	State/Territ...	Postal Code
<a href="#">601 E ST ...</a>	WASHINGT...	DC	20049-0001

[View All](#)

**Program Volunteer (1)** New

Program V...	Program	Status	Assignmen...
<a href="#">PV004482...</a>	Tax-Aide	Prospect	

[View All](#)

**Edit AS00766437** \* = Required Information

\* Status

Submitted

View all dependencies

Candidate Duration ⓘ

1

No Match Reason ⓘ

--None--

View all dependencies

Is Active

*This field is calculated upon save*

Start Date ⓘ

End Date ⓘ

cancel Save & New **Save**

\* Status

- Submitted
- None--
- Submitted
- Candidate**
- Approved
- On Hold
- No Match

## Change to Candidate – Good Fit!, cont'd

**AFTER:**

Volunteer Assignments (1)				New
Volunteer ...	Is Active	Position	Status	
<a href="#">AS007664...</a>	<input checked="" type="checkbox"/>	Prospective...	Candidate	▼
				<a href="#">View All</a>

Addresses (1)				New
Address L...	City	State/Territ...	Postal Code	
<a href="#">601 E ST ...</a>	WASHINGT...	DC	20049-0001	▼
				<a href="#">View All</a>

Program Volunteer (1)				New
Program V...	Program	Status	Assignmen...	
<a href="#">PV004482...</a>	Tax-Aide	Under Consi...		▼
				<a href="#">View All</a>

Volunteer Assignment:  
Position = Prospective Volunteer  
Status = *Candidate*

Program Volunteer:  
Program = Tax-Aide  
Status = *Under Consideration*\*  
\*Updates *automatically* when Prospective Volunteer  
Assignment status changed to Candidate

SECTION 3

# Send Portal Access Notification

## Send Portal Access Notification to Candidate

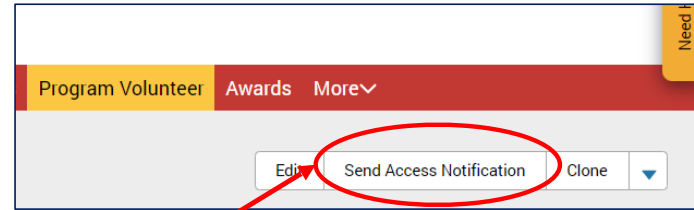


See Tip Sheet VP04.05 Send Access Notification

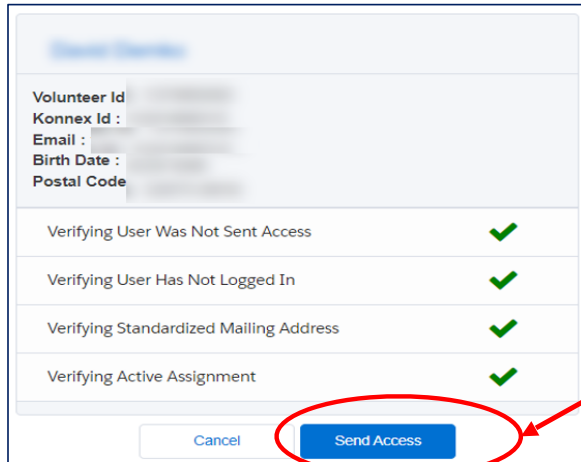
- Portal Access Notification is an email with instructions for the Candidate to access the Volunteer Portal for the first time. It is sent by the system when initiated by a Leader (DC/AC).
- It must be sent to all Candidates **before** training so that they can access Portal Libraries and complete LMS courses
- Per State / District choice, this can be done:
  - Immediately upon conversion to Candidate (easiest for DC/AC to remember)
  - Shortly before Training starts – Lessen chance of confusing Candidates if conversion happens in Summer/early Fall. Less likelihood of email being lost/deleted.
- Let Candidates know that email is coming and what they should do with it.

## Send Portal Access

1. Prospect must be in Candidate Status!
2. On Candidate's Contact Record
3. Scroll down to Program Volunteer Record
4. Click the PV##### for **Tax-Aide**
5. On top right of screen click **Send Access Notification**

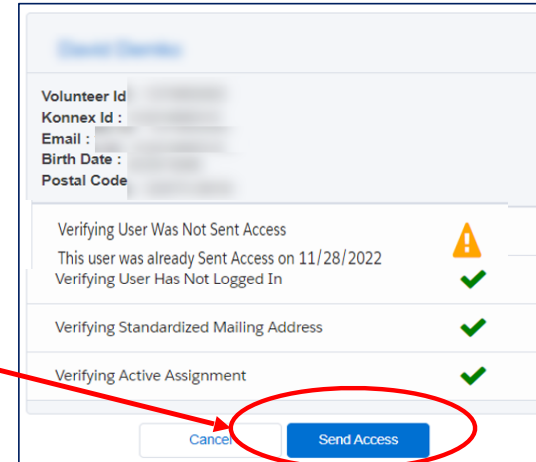


If Access has **NOT** been sent:



For either of these cases click "Send Access"

If Access sent, but Prospect has **NOT** logged in:



## Send Portal Access – Errors

If Prospect HAS logged in, Send Access cannot be sent again:

Volunteer Id	
Konnex Id :	
Email :	
Birth Date :	
Postal Code	
Verifying User Was Not Sent Access This user was already Sent Access on 11/22/2021	⚠
Verifying User Has Not Logged In Volunteer Registered on 11/22/2021. The volunteer should go directly to <a href="http://volunteer.aarp.org">http://volunteer.aarp.org</a> to log-in. If needed, the volunteer can reset his/her password on the log-in page by clicking Forgot Password? If additional assistance is needed, please contact your Program's staff.	✘
Verifying Standardized Mailing Address	✓
Verifying Active Assignment	✓
<input type="button" value="Cancel"/> <input type="button" value="Send Access"/>	

Read carefully. This is NOT an error, volunteer HAS previously logged in. If they don't remember their password, they will need to reset it.

Reach out to ADS if assistance is needed

## Send Portal Access – Data Conflict

This requires a ticket to correct. Contact ADS to submit the ticket.

### Send Access Unavailable

Due to a data conflict with the contact record for the volunteer you are attempting to invite to access the Volunteer Portal, an AARP Staff Member must resolve the data conflict before proceeding.

Please contact your Program for assistance and be sure to provide the Volunteer ID number and error message(s) so the issue can be resolved in a timely manner. Thank you.

**AARP Foundation Tax-Aide:** Email [taxaide@aarp.org](mailto:taxaide@aarp.org)

**AARP Driver Safety:** Driver Safety Customer Service will address this problem within two business days

**AARP Chapters, AARP State Volunteers, NRTA, or Purpose Prize :** call 1-866-740-7719 or email [volunteer@aarp.org](mailto:volunteer@aarp.org)

**AARP Foundation Experience Corps:** Email [nvpexperiencecorps@aarp.org](mailto:nvpexperiencecorps@aarp.org)



SECTION 4

# Zip Code Routing

## Zip Code Routing to Split State and District

See Tip Sheet VP 04.04 Updating Preferred Zip Code

- Done *automatically* based on Mailing address Zip Code
- Why would it need to be changed?
  - If Prospect lives in one SS/District but wants to work in a different one (e.g., the other SS/District site is closer, wants to work with friends)
  - Prospect is a temporary resident (i.e., snowbird)
  - If Prospect is routed incorrectly. In this case, ADS will Submit a Request to have the routing table corrected
- Contact your ADS for assistance



SECTION 5

# Convert Prospective Volunteer to Volunteer

## Steps to Convert Prospective Volunteer to Volunteer

See VP04.06 - Converting A Prospective Volunteer To A Volunteer



Responsibility of District Leaders – with *support, training and assistance as necessary* from ADS

1. Candidate Trains, Certifies, and *Certification is entered and marked as Complete* in Portal (by District)
2. Add new Volunteer Assignment (by DC / AC)
3. End Prospective Volunteer Assignment (by DC / AC)

## Add a Volunteer Assignment

**Only AFTER** a Prospective Volunteer with “Candidate” Status has completed **ALL** certification requirements **AND** has been marked as “Certification Complete” on their Certification Bulk Edit screen:

1. Go to Candidate’s Contact Record
2. Click on **New** in **Volunteer Assignments** box



Volunteer Assi...	Is Active	Position	Status	
<a href="#">AS00766437</a>	<input checked="" type="checkbox"/>	Prospective Vol...	Candidate	▼
				<a href="#">View All</a>

## Add a Volunteer Assignment, cont'd

3. Enter the following fields:

- **Position:** Name of position (e.g., TA-R0X-SSX-DXX-Sxxxxxxx Counselor)
- **Status:** Approved
- **Start Date:** "Today's date"  
- Do NOT back date.
- **SAVE**

Information

\*Volunteer ⓘ  
Vivian Jackson

\*Status ⓘ  
Submitted

\*Position ⓘ  
Search Positions...

Assignment ID

Interim Assignment ⓘ

Local Title ⓘ

Candidate Selection ⓘ  
No Match Reason ⓘ  
--None--

\*Start Date ⓘ

End Date ⓘ

Assignment Count ⓘ

Total Hours ⓘ  
0.00

\*Status ⓘ  
Submitted

--None--  
Submitted  
Candidate  
Approved  
On Hold  
No Match

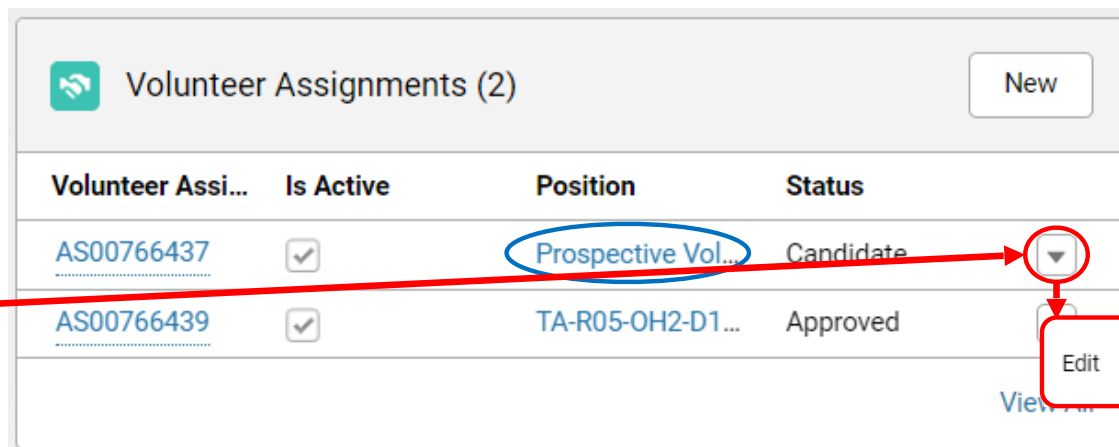
Cancel Save & New Save

Short cut: Type the site SIDN, then Enter. Select the assignment from the resulting list.

Once Approved, Always Approved

## End Prospective Volunteer Assignment

1. On Candidate's Contact Record
2. Click the pull-down by the Prospective Volunteer assignment
3. Click Edit



The screenshot shows a table titled "Volunteer Assignments (2)" with a "New" button in the top right. The table has four columns: "Volunteer Assi...", "Is Active", "Position", and "Status". There are two rows of data. The first row has "AS00766437" in the first column, a checked box in the second, "Prospective Vol..." in the third, and "Candidate" in the fourth. A blue oval highlights the text "Prospective Vol..." in the third column. A red arrow points from this oval to a pull-down menu icon in the fourth column. A second red arrow points from the pull-down menu icon to a red-bordered box containing the word "Edit". The second row has "AS00766439" in the first column, a checked box in the second, "TA-R05-OH2-D1..." in the third, and "Approved" in the fourth. A "View" link is partially visible at the bottom right of the table.

Volunteer Assi...	Is Active	Position	Status
<a href="#">AS00766437</a>	<input checked="" type="checkbox"/>	Prospective Vol...	Candidate
<a href="#">AS00766439</a>	<input checked="" type="checkbox"/>	TA-R05-OH2-D1...	Approved

## End Prospective Volunteer Assignment, cont'd

4. Enter the following fields:

- **Status:** Approved
- **Start Date:** Enter “yesterday’s date”
- **End Date:** Enter “yesterday’s date”
- **Save**

The screenshot shows a form for managing a prospective volunteer record. The form includes the following fields and options:

- Volunteer:** Vivian Jackson
- Position:** Prospective Volunteer
- Assignment ID:** AS00766437
- Program Location:** (empty)
- Is Expense Eligible:**
- Interim Assignment:**
- Local Title:** (empty)
- Status:** Candidate (dropdown menu)
- Candidate Duration:** 1
- No Match Reason:** -None- (dropdown menu)
- Is Active:**
- Start Date:** (calendar icon)
- End Date:** (calendar icon)
- Assignment Count:** (empty)
- Total Hours:** 0.00

Annotations include red circles around the Status dropdown, Start Date, End Date, and Save buttons. Red arrows point from the instructions to these fields. A yellow box highlights the Start and End Date fields with a note. A green callout bubble is also present.

Both **Start** and **End** dates should be the same date, the day **before** the Start Date of the new Assignment made in the previous step.

The status dropdown menu is open, showing the following options: Submitted, -None-, Submitted, Candidate, **Approved**, On Hold, and No Match. The 'Approved' option is circled in red.

**Once Approved,  
Always Approved**

# Onboarding Complete!

On Contact Record, verify:

- In **Volunteer Assignments** box:
  - **Volunteer** assignment **Is Active** box **is** checked and **Status** is **Approved**
  - **Prospective Volunteer** assignment **Is Active** box is **not** checked and **Status** is still **Approved**

**Once Approved,  
Always  
Approved**

Contacts > Vivian Jackson  
**Volunteer Assignments**

2 items • Sorted by Is Active • Updated a few seconds ago

	Volunteer...	Is Acti...	Position	Status	Program	Start Date	End Date	Program Location
1	AS00766439	<input checked="" type="checkbox"/>	TA-R05-OH2-D11-S45052000 Counselor	Approved	TA-R05-OH2-D11-S45052000	1/30/2024		COUNTY SENIOR CENTER
2	AS00766437	<input type="checkbox"/>	Prospective Volunteer	Approved	Tax-Aide	1/29/2024	1/29/2024	

In **Program Volunteer** box:

Tax-Aide Status = **Volunteer**

**Program Volunteer (1)** New

Program ...	Program	Status	Assignme...
PV00440...	Tax-Aide	Volunteer	

[View All](#)

Verify correct location

Verify correct role

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.

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