

Volunteer Record Management



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.
 - VP06 Tip Sheets in the portal library cover all Volunteer Record Management 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.
- Once a Prospect is certified, all assignments will ALWAYS be "Approved." This applies even for Leave of Absence and Retired.
 - 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

Add and End Volunteer Assignments

Assignments Overview

District Coordinators must ensure that all volunteers in the district have the correct assignments on their Portal record. Only DCs, ACs and ADSs have the ability to add and end assignments. This task may be delegated to the AC. Volunteer Assignment updates to the Portal typically occur during Training and Certification periods but may occur at any time.

- New Volunteers need their first assignment(s) after completing Training and Certification.
- Returning volunteers may move from one site to another, work at an additional site or take on a new position*.
- Existing volunteers may need to be retired or put on Leave of Absence.

All changes must be documented in the Portal to ensure that those records are complete and accurate, This is Tax-Aide policy and a requirement of the IRS.

* If the new position has certification requirements in addition to those for currently held positions, the additional requirements **must be met and entered in the Portal **PRIOR**** to making the new assignment.

Add a Volunteer Assignment

See Tip Sheet VP06.02 – Add a Volunteer Assignment

AFTER the Volunteer has *completed* ALL certification requirements for the new assignment AND the requirements have been *entered* on the Volunteer's Certification Bulk Edit screen (VP05), complete these steps.

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



Volunteer Assignments (2)				New
Volunteer Assi...	Is Active	Position	Status	
AS00766437	<input type="checkbox"/>	Prospective Vol...	Approved	▼
AS00766439	<input checked="" type="checkbox"/>	TA-R05-OH2-D1...	Approved	▼

[View All](#)

Assignments should be made for any site the volunteer works at on a regular basis. If subbing, an assignment is not needed.

Add a Volunteer Assignment, cont'd

3. Enter the following fields.

- **Position:** Name of Position (e.g., TA-Rxx-SSx-Dxx-Sxxxxxxx Counselor)

- **Status:** Approved

- **Start Date:** "Today's date"
- Do NOT back date.

- **SAVE**

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

For District Level assignment, enter SSx-Dxx and Enter. Select the assignment from the results.

The screenshot shows a web form for adding a volunteer assignment. The form is divided into several sections: Information, Status, Candidate Duration, Start Date, End Date, Assignment Count, and Total Hours. The 'Information' section includes fields for Volunteer (Vivian Jackson), Position (Search Positions...), Assignment ID, Interim Assignment (checkbox), and Local Title. The 'Status' section has a dropdown menu set to 'Submitted'. The 'Candidate Duration' section has a dropdown menu set to '-None-'. The 'Start Date' and 'End Date' fields are empty. The 'Assignment Count' field is empty. The 'Total Hours' field is set to 0.00. A red arrow points from the 'Status' dropdown menu to a larger dropdown menu on the right, which shows the 'Approved' option selected. A green callout bubble with the text 'Once Approved, Always Approved' is positioned near the 'Approved' option. A red circle highlights the 'Save' button at the bottom of the form.

**Once Approved,
Always Approved**

Add a Volunteer Assignment, cont'd

After adding the assignment, review the Volunteer Assignments box.

- **Volunteer Assignments** - Is Active box is checked for new assignment
- Status = Approved



Contacts > Vivian Jackson
Volunteer Assignments

3 items • Sorted by Start Date • Updated a few seconds ago

	Volunteer...	Is Active	Position	Status	Program	Start ...	End Date	Program Location	Lo...
1	AS00766440	<input checked="" type="checkbox"/>	TA-R05-OH2-D11-S45052000 Electroni...	Approved	TA-R05-OH2-D11-S45052000	2/15/2024		COUNTY SENIOR CENTER	▼
2	AS00766439	<input checked="" type="checkbox"/>	TA-R05-OH2-D11-S45052000 Counselor	Approved	TA-R05-OH2-D11-S45052000	1/30/2024		COUNTY SENIOR CENTER	▼
3	AS00766437	<input type="checkbox"/>	Prospective Volunteer	Approved	Tax-Aide	1/29/2024	1/29/2024		▼

Review **Program Volunteer** box.

- **Status** = Volunteer

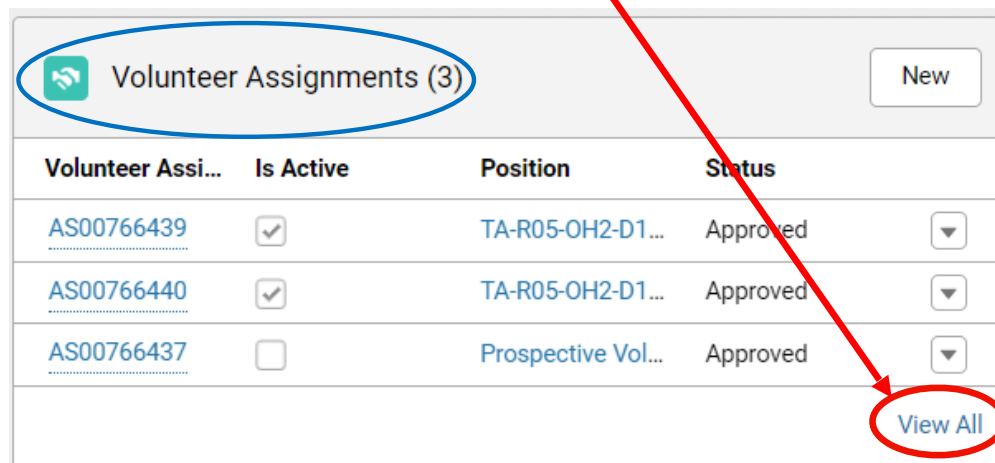
Program Volunteer (1)				New
Program Volunte...	Program	Status	Assignment Ended ...	
PV00448295	Tax-Aide	Volunteer		▼
				View All

End a Volunteer Assignment

See Tip Sheet VP06.03 – End a Volunteer Assignment



1. Go to Volunteer's Contact Record.
2. In the **Volunteer Assignments** box, click "View All".



The screenshot shows a web interface for "Volunteer Assignments (3)". The title "Volunteer Assignments (3)" is circled in blue. A "New" button is in the top right. Below is a table with columns: "Volunteer Assi...", "Is Active", "Position", and "Status". Three rows of data are shown. A red arrow points from the text "View All" in the instructions to a "View All" link at the bottom right of the table, which is circled in red.

Volunteer Assi...	Is Active	Position	Status
AS00766439	<input checked="" type="checkbox"/>	TA-R05-OH2-D1...	Approved
AS00766440	<input checked="" type="checkbox"/>	TA-R05-OH2-D1...	Approved
AS00766437	<input type="checkbox"/>	Prospective Vol...	Approved

End a Volunteer Assignment, cont'd

3. Locate the assignment and click the down arrow at the right of the assignment line.
[?] Many assignments look alike. Make sure you are ending the right one!
4. Select "Edit".

Contacts > Vivian Jackson
Volunteer Assignments

3 items • Sorted by Is Active • Updated 16 minutes ago

	Volunteer...	Is Acti...	Position	Status	Program	Start Date	End Date	Program Location	Lo...	
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	AS00766440	<input checked="" type="checkbox"/>	TA-R05-OH2-D11-S45052000 Electroni...	Approved	TA-R05-OH2-D11-S45052000	2/15/2024		COUNTY SENIOR CENTER		▼
3	AS00766437	<input type="checkbox"/>	Prospective Volunteer	Approved	Tax-Aide	1/29/2024	1/29/2024			▼

Edit

End a Volunteer Assignment, cont'd

5. Enter an **End Date** - Use a date before “today” so assignment ends immediately (i.e., “yesterday’s date”)
6. **Save**

Important!!!

- **Never** Change Status from “Approved”.
- Do not use “On Hold” or “No Match” for ending a regular Volunteer Assignment.

The screenshot shows a form for managing a volunteer assignment. The form includes the following fields and controls:

- *Volunteer:** Vivian Jackson
- *Status:** Approved
- *Position:** TA-R05-OH2-D11-S45052000 Electronic Return Or
- Assignment ID:** AS00766440
- Program Location:** COUNTY SENIOR CENTER
- Is Expense Eligible:**
- Interim Assignment:**
- Local Title:**
- Start Date:** 2/15/2024
- End Date:** (This field is circled in blue in the image)
- Assignment Count:**
- Total Hours:** 0.00
- Buttons:** Cancel, Save & New, Save (The Save button is circled in red in the image)

A green callout bubble with a black border and white text says "Once Approved, Always Approved". A red arrow points from the text "yesterday's date" in step 5 to the End Date field.

End a Volunteer Assignment, cont'd

After ending the assignment, review the Volunteer Assignments box

- **Volunteer Assignments** shows assignment ended is no longer "Active".
- **Status** = Approved



Contacts > Vivian Jackson
Volunteer Assignments

3 items • Sorted by Start Date • Updated 6 minutes ago

	Volunteer...	Is Active	Position	Status	Program	Start ...	End Date	Program Location
1	AS00766440	<input type="checkbox"/>	TA-R05-OH2-D11-S45052000 Electroni...	Approved	TA-R05-OH2-D11-S45052000	2/15/2024	7/27/2024	
2	AS00766439	<input checked="" type="checkbox"/>	TA-R05-OH2-D11-S45052000 Counselor	Approved	TA-R05-OH2-D11-S45052000	1/30/2024		COUNTY SENIOR CENTER
3	AS00766437	<input type="checkbox"/>	Prospective Volunteer	Approved	Tax-Aide	1/29/2024	1/29/2024	COUNTY SENIOR CENTER

Program Volunteer shows

- **Status** = Volunteer
(still has an Active assignment)

Program Volunteer (1)				New
Program Volunte...	Program	Status	Assignment Ended ...	
PV00448295	Tax-Aide	Volunteer		▼
				View All

SECTION 2

Volunteer Leaves Active Service With Tax-Aide

Volunteer Leaves Active Service With Tax-Aide

See Tip Sheet VP06.06 – Volunteer Leaves Active Service With Tax-Aide Program



When a Volunteer leaves Active Service with Tax-Aide, update the status to one of the following

- Leave of Absence - The departure is Temporary and the volunteer expects to return to service, generally in 1- 2 years
- Retired - The departure is Permanent and the volunteer does not plan to return to service

Volunteer Leaves Active Service With Tax-Aide, cont'd

1. Go to Volunteer's Contact Record
2. End all Active Assignments
3. Refresh page by clicking on Volunteer name
4. System generates warning in orange banner

Contacts [Vivian Jackson](#)
Volunteer Assignments

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

	Volunteer...	Is Acti...	Position	Status	Program
1	AS00766437	<input type="checkbox"/>	Prospective Volunteer	Approved	Tax-Aide
2	AS00766439	<input type="checkbox"/>	TA-R05-OH2-D11-S45052000 Counselor	Approved	TA-R05-OH2-t
3	AS00766440	<input type="checkbox"/>	TA-R05-OH2-D11-S45052000 Electroni...	Approved	TA-R05-OH2-t




WARNING: ACTION REQUIRED - Please update the corresponding **TAX-AIDE** Program Volunteer record with the appropriate Assignment Ended Reason. See [PV00448295](#) to review.

5. Click the [PV#####](#) in the Orange banner or navigate to the Tax-Aide Program Volunteer box and select the Tax-Aide record to edit.

Volunteer Leaves Active Service With Tax-Aide, cont'd

6. Click to select the Assignment Ended Reason.

Volunteer ⓘ Vivian Jackson ✎	Status ⓘ Assignment Ended ✎
Program ⓘ Tax-Aide ✎	Assignment Ended Reason ⓘ ✎
Zip Code Route To ⓘ 45729 ✎	Declined Reason ⓘ ✎
Preferred Zip Code ✎	LOA/Suspension Start Date ⓘ ✎
Program Route To ⓘ TA-R05-OH2-D11 ✎	LOA/Suspension End Date ⓘ ✎



Continue to next slide for **Leave of Absence**

Skip next two slides for **Retired** – Slide 20

Leave of Absence

For **Leave of Absence** enter

- **Assignment Ended Reason:** Leave of Absence
- **LOA Start Date:** same date as End Date of most recently ended assignment
- **SAVE**

The screenshot shows the 'Assignment Ended' form in the Volunteer Record Management system. The form includes the following fields and options:

- * Volunteer:** Vivian Jackson
- * Status:** Assignment Ended
- * Program:** Tax-Aide
- Zip Code Route To:** 45729
- Preferred Zip Code:** (empty)
- Program Route To:** TA-R05-OH2-D11
- Assignment Ended Reason:** A dropdown menu is open, showing options: --None-- (checked), Retired, **Leave of Absence**, Dismissed, Emeritus, Suspended, Referred to Another Program, Duplicate, and Relocated.
- LOA/Suspension Start Date:** A date field with a calendar icon.
- LOA/Suspension End Date:** A date field with a calendar icon.
- Buttons:** Cancel and **Save** (circled in red).

Red arrows point from the text on the left to the 'Assignment Ended Reason' dropdown, the 'LOA Start Date' field, and the 'Save' button. Blue circles highlight the 'Assignment Ended Reason' dropdown, the 'LOA/Suspension Start Date' field, and the 'Save' button.

Leave of Absence, cont'd

After ending the assignment, review the Volunteer Assignments box

- **Volunteer Assignments** show no "Active" assignments.
- **Status** = Approved



Contacts > Vivian Jackson

Volunteer Assignments

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

	Volunteer...	Is Acti...	Position	Status	Program	Start Date	End Date	Program Location
1	AS00766437	<input type="checkbox"/>	Prospective Volunteer	Approved	Tax-Aide	1/29/2024	1/29/2024	
2	AS00766439	<input type="checkbox"/>	TA-R05-OH2-D11-S45052000 Counselo...	Approved	TA-R05-OH2-D11-S45052000	1/30/2024	7/27/2024	COUNTY SENIOR CENTER
3	AS00766440	<input type="checkbox"/>	TA-R05-OH2-D11-S45052000 Electroni...	Approved	TA-R05-OH2-D11-S45052000	2/15/2024	7/27/2024	COUNTY SENIOR CENTER

Program Volunteer shows

- **Status** = Assignment Ended
- **Assignment Ended Reason** = Leave of Absence

Program Volunteer (1)				New
Program Volunte...	Program	Status	Assignment Ended ...	
PV00448295	Tax-Aide	Assignment Ended	Leave of Absence	▼
				View All

Retired Volunteer

Continued from Slide 17

For **Retired**, enter

- **Assignment Ended Reason: Retired**
- **SAVE**

The screenshot shows a form for managing a volunteer record. The form is divided into several sections:

- *Volunteer:** A dropdown menu showing "Vivian Jackson".
- *Status:** A dropdown menu showing "Assignment Ended". Below it is a link "View all dependencies".
- *Program:** A dropdown menu showing "Tax-Aide".
- Assignment Ended Reason:** A dropdown menu showing "--None--". This menu is open, showing a list of options: "--None--", "Retired", "Leave of Absence", "Dismissed", "Emeritus", "Suspended", "Referred to Another Program", "Duplicate", and "Relocated". The "Retired" option is circled in red.
- Zip Code Route To:** A dropdown menu showing "45729".
- Preferred Zip Code:** An empty text input field.
- Program Route To:** A dropdown menu showing "TA-R05-OH2-D11". Below it is the text "This field is calculated upon save".
- LOA/Suspension Start Date:** A date and time selection field.
- LOA/Suspension End Date:** A date and time selection field.
- Program Volunteer ID:** A text field showing "PV00448295".
- Lifetime Hours:** A text field.
- Buttons:** "Cancel" and "Save" buttons are at the bottom. The "Save" button is circled in red.

Retired Volunteer, cont'd

After ending the assignment, review the Volunteer Assignments box

- **Volunteer Assignments** show no "Active" assignments.
- **Status** = Approved

**Once Approved,
Always Approved**

Contacts > Vivian Jackson

Volunteer Assignments

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

	Volunteer...	Is Acti...	Position	Status	Program	Start Date	End Date	Program Location
1	AS00766437	<input type="checkbox"/>	Prospective Volunteer	Approved	Tax-Aide	1/29/2024	1/29/2024	
2	AS00766439	<input type="checkbox"/>	TA-R05-OH2-D11-S45052000 Counselo...	Approved	TA-R05-OH2-D11-S45052000	1/30/2024	7/27/2024	COUNTY SENIOR CENTER
3	AS00766440	<input type="checkbox"/>	TA-R05-OH2-D11-S45052000 Electroni...	Approved	TA-R05-OH2-D11-S45052000	2/15/2024	7/27/2024	COUNTY SENIOR CENTER

Program Volunteer shows

- **Status** = Assignment Ended
- **Assignment Ended Reason** = Retired

Program Volunteer (1)				New
Program Volunte...	Program	Status	Assignment Ended ...	
PV00448295	Tax-Aide	Assignment Ended	Retired	▼

View All

Retired Volunteer, cont'd

NOTE: When Assignment Ended Reason is Retired, the system automatically sends an email to the Volunteer thanking them for their service. It also includes the link to a survey.

NOTE: ONLY use **Retired** or **Leave of Absence**. There are many other options in the Assignment Ended Reason pulldown box.

Improper selection can cause the volunteer to be “lost” and not included in reports.

The screenshot displays a form for managing a volunteer record. The form is divided into several sections:

- *Volunteer:** A dropdown menu showing "Vivian Jackson".
- *Program:** A dropdown menu showing "Tax-Aide".
- Zip Code Route To:** A dropdown menu showing "45729".
- Preferred Zip Code:** An empty text input field.
- Program Route To:** A dropdown menu showing "TA-R05-OH2-D11". Below it, a note states "This field is calculated upon save".
- *Status:** A dropdown menu showing "Assignment Ended". Below it, a link "View all dependencies" is visible.
- Assignment Ended Reason:** A dropdown menu showing "--None--". Below it, a link "View all dependencies" is visible.
- Declined Reason:** A dropdown menu showing "--None--". Below it, a link "View all dependencies" is visible.
- LOA/Suspension Start Date:** A date input field with a calendar icon.
- LOA/Suspension End Date:** A date input field with a calendar icon.

The "Assignment Ended Reason" dropdown menu is open, showing the following options:

- None--
- Retired
- Leave of Absence
- Dismissed
- Expired
- Suspended
- Referred to Another Program
- Duplicate
- Reinstated

At the bottom of the form, there are "Cancel" and "Save" buttons. The "Program Volunteer ID" is displayed as "PV00448295".

Deceased Volunteer

- **DO NOT** end active assignments or mark “Retired”.
- Provide ADS with following information and ADS will Submit a Request
 - Deceased Volunteer’s name and Volunteer ID Number
 - Date of death
 - Who informed you of the volunteer’s passing
 - If decedent has a current LC or DC assignment

Note: Follow the same instructions as above if you learn of the passing of a Volunteer who is on Leave of Absence or is already Retired.

SECTION 3

Volunteer Returns to Active Service

Volunteer Returns from LOA or Retirement - Standard Process

See Tip Sheet VP06.04 – Returning Retired or Leave of Absence Volunteer – Standard Process

See Tip Sheet VP06.02 – Add A Volunteer Assignment

See Tip Sheet VP04.02 - Processing a Prospective Volunteer

Returning Volunteer who has **not Certified for more than** two tax seasons

- Create a **NEW** Prospective Volunteer Assignment with Submitted or Candidate status
Note: Do NOT edit a prior Prospective Volunteer assignment.
- Convert to Volunteer using the same procedure as with a new Prospective Volunteer

**Do NOT back
date start of new
assignment
Do NOT reuse
previous
assignment**

Volunteer Returns from LOA or Retirement - Expedited Process

See Tip Sheet VP06.05 – Returning Retired or Leave of Absence Volunteer – **Expedited Process**

Returning Volunteer who has **Certified** within the previous **one or two** tax seasons

- Create a **new** assignment which duplicates the *position* (i.e., Client Facilitator or Counselor) of an assignment most recently held by the volunteer, preferably at a site where the volunteer is likely to serve. If volunteer wishes to return to a position with fewer certification requirements than their previous assignment, give them that assignment (i.e., Counselor to CF)
- See Tip Sheet for how to handle this assignment if they do NOT certify.

**Do NOT back
date start of new
assignment**

**Do NOT reuse
previous
assignment**

Volunteer Transfers Across Split-State Lines

See Tip Sheet VP06.07 – Transferring a Volunteer Across Split States



- Volunteer should **not** submit a new Tax-Aide application. If email needs to be changed, the volunteer needs to change it at aarp.org (VP01.05 – Update Your Portal Email)
- DC/AC of the departing volunteer – Notify your ADS. Provide Volunteer’s new full address, if known. At a minimum, the new zip code is needed to determine the new district. Current assignments should not be ended by the current (departing) District.
- Current Split-State ADS will communicate with new Split-State ADS about the Volunteer’s move.
- New Split-State ADS will inform new DC, who will make contact with the volunteer, and add assignment in new location, if appropriate.

Error Prevention - When NOT to Submit an Application

Volunteers and Prospective Volunteers should NOT submit additional Applications. This error often occurs when the volunteer is:

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

SECTION 4

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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For a future without senior poverty.