AARP Real Possibilities

AARP FOUNDATION

THE VOLUNTEER PORTAL

Tax-Aide Volunteer Portal Frequently Asked Questions

September 2022

How to get help with the Volunteer Portal

If you have problems or questions concerning the Volunteer Portal, your first step should be to contact your Supervisor. This will generally be the Local Coordinator at your Tax-Aide site. Your District Coordinator and State Administration Specialist are also good resources. If you don't have an assignment at a site because you are new to Tax-Aide, you should contact the local leader who first contacted you.

If your local leaders cannot help you, then you can request help through the Volunteer Portal. After logging in:

- Select "Submit a Request" on the Home page, then
- Category = **Operations**,
- Topic = **Volunteer Portal,**
- then the best topic under Volunteer Portal
- (If your issue isn't a Portal one, then select the best Category/Topic for your issue)
- You should always copy your supervisor and relevant State Specialist if you know them

If you are unable to log into the Volunteer Portal to Submit a Request**,** send an email to AARP Foundation Tax-Aide at **taxaide@aarp.org**. Copy your supervisor and relevant State Specialist if you know them.

Navigation

Requirements for Portal Access
Only Volunteers or Prospective Volunteers with "Active" status are able to access the Volunteer Portal.

New Prospective Volunteers will receive an email invitation for access to the Volunteer Portal. Follow the instructions in the email to log in for the FIRST time. Subsequent access is obtained using the procedure described in the next paragraph. *If you need your status upgraded to Active or if you need to be sent a "Send Access" Invitation please contact your Supervisor.*

Logging In

To log into the Volunteer Portal, go to volunteers.aarp.org and enter your Portal email address, password, and the security letters. If you have forgotten your password, click "Forgot your password". You will use the same password and email to access both aarp.org and the Volunteer Portal

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Difficulty with Login

If you are having difficulty with Login, please contact your Volunteer Leader, your Split-State Administration Specialist (ADS), or Submit a Request as noted on page two.

Also, see the *Tax-Aide: Volunteer Portal 14 Portal Troubleshooting* tip sheet.

For additional information regarding basic navigation, please refer to the *Tax-Aide: Volunteer Portal –01 Accessing the Volunteer Portal* and *02 Introduction to the Volunteer Portal* tip sheets

How long after being inactive, does the Volunteer Portal system require you to log in again?

After 30 minutes of inactivity, users are required to log back in.

Contact Records

Each volunteer has a contact record in the Volunteer Portal. This record contains basic contact information for the volunteer (e.g., address, phone number, and email address). It also includes information on assignments, certification, training, reimbursement and much more

How do I access my Contact Record?

- If you are not a leader, click on the **Contacts** tab in the red bar at the top of the screen. Then click on your name with the blue link.

- If you are a leader, to find and open any Contact Record including your own, type the first and last name in the top (Global) search window and then click on the name with the blue link. If it is a common name, you may need to add your two-character state code

How can I edit my phone # and other information on my Contact Record?

Click "Edit" at the top of your contact record. When finished making changes click "Save." For more information, see the *Tax-Aide: Volunteer Portal –02 Contact Record tip* sheet. *Note you cannot edit your name or email directly in the Portal itself.*

How do I add or Edit Direct Deposit information?

Go to the Expense Reimbursement section of the Contact Record and Edit. When finished making changes click Save. For more information, see the *Tax-Aide: Volunteer Portal –02 Contact Record tip* sheet.

How do I update my mailing address?

Open your Contact Record. Go to the "Addresses" box on right side of the Contact record then either:

- click the down arrow to the right of your address and select Edit or
- click the blue link for the street address and click “Edit” at the top of the screen

Make changes and then click “Save.” *Note you cannot delete a Mailing address. You can only Edit it.*

How do I update my Name or Portal Email Address?
Your Name and Portal Email must be updated on your AARP account and cannot be updated directly in the Portal. Log in to www.aarp.org, select **My Account** (drop down next to “Hi your name” at top of screen), then select **Account Details.** Make your change and then click “Save.”

The changes you make at www.aarp.org will transfer over to the Volunteer Portal. The transfer may not take effect immediately.

For detailed instructions, go to the “*Tax-Aide: Volunteer Portal - 01 Accessing the Volunteer Portal – 01 Update your Portal Email”* tip sheet found in the **Library** tab in the red bar at the top of the screen.

Expenses

To enter your Tax-Aide Reimbursements, Click the Manage Reimbursements tab**.**

For specific directions, refer to the *Tax-Aide: Volunteer Portal –09 Reimbursements* tip sheets

How can I easily find my unsubmitted reimbursements?

Go to the Manage Reimbursements tab and then select My Reimbursements.

Learning Management System (LMS)

To access the Learning Management System (LMS) training Courses go to the tab marked **Training** in the red bar at the top of the screen.
If you are having difficulty accessing courses or opening this tab, go the Library called Tax-Aide Learning Management System for help. The Tip Sheets: “Access Learning Content” and “Troubleshooting Basic Access Issues for LMS (SAP Litmos)” should be helpful

How are Milestone Awards calculated?

Milestone awards are based on **Net Years Served.Net years served** calculates the amount of time a volunteer has served using volunteer assignment start and end dates, while not counting any gaps in service. Only **Net Years Served** is used to determine Service Year Awards. **Net Years Served** can be found in the Program Volunteer portion of the Contact record. See tip sheet *Volunteer Portal –12 Net Years Served Vs. Years of Service*.

Libraries

The Libraries tab contains the reference material and guides for use by all Tax-Aide Volunteers. Most Frequently used Libraries are:

- National Tax Training Committee (Red Folder) – Tax Law, Training (Not LMS)
- Technology (Blue folder) – Computers and equipment
- Volunteer Portal – Everything related to the Portal - Contact records, Sites, Reimbursements

To easily find information in the Libraries use one of three methods:

- Built in Table of Contents and Change Logs in some Libraries
- Last Modified Date Sort for most recent information
- Top (Global) Seach window to search for a given word or topic

For additional information, please refer to the *Tax-Aide: Volunteer Portal –13 Libraries* tip sheets.

FAQ for LOCAL (and DISTRICT) COORDINATORS

Site Management

For information regarding Site Management, refer to the *Tax-Aide: Volunteer Portal –07 Site Management* tip sheet.

For more information regarding Program Metrics, refer to the *Tax-Aide: Volunteer Portal – 08 Program Metrics* tip sheet

Application Link

This is the application link that should be used for new volunteers: http://www.aarpfoundation.org/taxaidevolunteer

Reports and Dashboards

For additional information, please refer to the *Tax-Aide: Volunteer Portal* Library > 02 Introduction to the Portal

What is the best way to find a report or Dashboard for the first time?

To search for a Dashboard or Report that you have not used before

1. Type Split State such as "AL1" (or Region such as "R07") in the Global Search box, press Enter
2. If you know part of the name of the Report, include that in the search box – "AL1 volunteers"
3. Select Dashboards or Reports from the left Search Results menu and select the Dashboard or Report needed from the list of Dashboards or Reports for your split state (or Region)

Using the "Folder" method to find Reports:

1. Click on the "Reports" tab in the red bar
2. Click on "All Folders" on the left side of the screen
3. Scroll through the list of folders for the type of report you are looking for (such as "Prospects – Active") and click on it
4. Scroll through the list of reports in that folder to find the one you are looking for. The list may be sorted alphabetically by clicking on the "name" header.

Why should I use a Dashboard instead of running a Report directly?

Dashboards have two advantages, especially for District leaders: 1) Dashboards can be filtered by District (or other filters) so you only see your District results in the reports; 2) Dashboards are an easy way to find and run the most frequently used reports

What is the best way for me to find a report or Dashboard I use often?

Navigate to the Dashboards tab or Reports tab, then select "Recent" on the left panel.

How do I refresh reports before printing/exporting?

When loading, Reports will refresh automatically, so reports are ready to be printed and exported after opening.

How do I filter for my district?

From the Dashboard, choose your district from the "District" dropdown. Select the report by clicking "View Report" at the bottom of the dashboard component. The district filter will be maintained for the report.

What is the difference between the Volunteer Leader and Supervisor dashboards?

The Supervisor dashboard includes Active volunteers, sites, and reimbursements. The Volunteer Leader dashboard includes Active volunteers and sites.

Why do I see "Created by Me" and "Private Reports" when I am on the Reports tab?

While volunteers do not have the ability to create reports, these navigation menus are standard for all users on the Reports tab.

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