

# ADS Presentation

## October 20, 2017

## Volunteer Portal Guide

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- Located in OneSupport Help Center – in the “Operational Procedures and Volunteer Portal” folder
- Each section is listed separately for printing
  - Volunteer Portal Guide (Printable Version) 07/17/2017
  - Replaces entire guide from last season
  - “Follow”; to be notified of changes

## New Volunteer Portal (NVP)



- PVs sign up at AARP.org
- Based on their zip code (home address), they are directly routed to a VT1 district.
- Emails are again being sent to notify the SC, ADS, DC of a new volunteer to be processed
- Check the portal reports frequently; volunteers may have moved to another district (and no email sent in those cases)
- Grant continues to send extra sets of training materials to DCs directly for new prospects

## New Volunteer Portal (NVP)



- Select your Dashboard; “TA-R01-VT1-Supervisor”. You can filter to your district.
- First thing when you call up your Dashboard: REFRESH !!
- “Reports” tab: These are headquarters-generated and a good way to see status of volunteers, list of sites, reimbursements, etc. You can “pin” them to the top of your list.
- Search function – easy way to call up a particular volunteer or site (can enter volunteer’s name; no need to use ID #)
- Recent items opened listed on left side of “Home” tab

## Volunteer Positions/Certification



- Certifications will continue to report every title held and every site worked. (For tracking reimbursements)
- National still working on the process for this season; but it is usually:
  - ADS will send spreadsheet to DCs for their completion
  - Need info from each DC on all certified volunteers, their full certifications, their titles, and all the sites they will work
  - Certifications due to the IRS first week of February
  - Must be returned to ADS in January

## Site Management

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- Site operations information updates
  - Examples: open/close dates, languages, operation schedule and comments, etc.
  - Maintained by DC
- Other updates
  - Maintained by National Office
    - Open new site/reactivate an inactive site
    - Close/deactivate sites
    - Site relocations
    - District or state realignments
  - ADS submits OneSupport request

- Activity Reporting
  - Activity that is not automatically reported
    - Federal returns (paper) current year
    - Federal returns (paper) prior year
    - Federal returns (paper) amended
    - State-only paper
    - Q & A
  - Only one reporting period now; but LCs should enter metrics regularly

## Reimbursements

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- Volunteers can submit flat rate or itemized expenses through the portal
- Supervisors can submit flat rate reimbursements for those who report directly to them
- No mailing of Excel spreadsheets is allowed.
- Portal Guide contains complete instructions for pre-approvals, flat rate and itemized reimbursements.



### Material Ordering

- No known changes from last season

### Service Awards

- Ordered by the ADS once per season
- Who is due an award taken from portal volunteer information; then sent to DC for approval