

AARP Tax Aide Recruitment Web System User Manual

Version 1.0

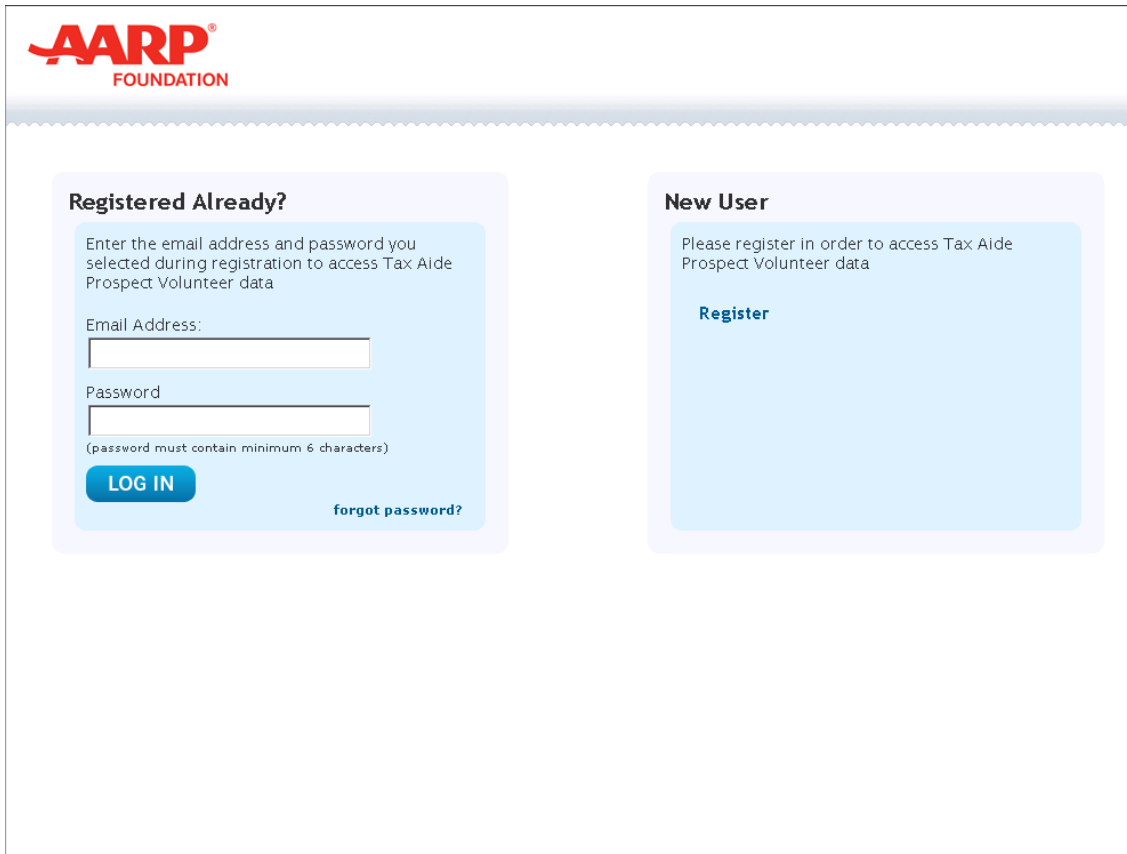
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1.0 Login to the Recruitment (internet)

Go to the following location: <https://volunteers.aarp.org/taxaide/internet/> the below screen (Screen 1) will be displayed.

Screen 1:



The screenshot shows the AARP Foundation login and registration interface. At the top left is the AARP FOUNDATION logo. Below it, there are two main sections: "Registered Already?" and "New User".

Registered Already?

Enter the email address and password you selected during registration to access Tax Aide Prospect Volunteer data

Email Address:

Password

(password must contain minimum 6 characters)

LOG IN

[forgot password?](#)

New User

Please register in order to access Tax Aide Prospect Volunteer data

Register

If Registered Already: Enter valid email address and password in the login window.
Note: please use the same email address and password created in the registration process.

Screen 2:



Logged in as: Ronica Krishnan | [Log out](#)

CONFIDENTIALITY AND PRIVACY POLICY

In accordance with AARP policy, use of this application and data is restricted. Only AARP Tax Aide volunteers and other system users who have a legitimate job-related need to use VMIS information, files or records are authorized to access such information. It is a violation of AARP Policy to access, use, duplicate, alter, or disclose AARP information for reasons not related to job duties and without appropriate authorization. Use of this system can and may be monitored.

Clicking “Cancel” will take the user back to the Login screen. If the user clicks on “I Agree” the following recruitment main page (Screen 3) will be displayed:

Screen 3:



Logged in as: Arthur Welch | [Log out](#)

AARP TAX AIDE - PROSPECTIVE VOLUNTEERS

i Split State: **VA1**
State Coordinator **Arthur Welch**
State Coordinator Email: **ARTWELCH@MSN.COM**

ADS: **Robert Erskine**
ADS Email: **rfe001@gmail.com**
PVC: **Joyce Blanton**
PVC Email: **wblanton@cox.net**

Click on prospective volunteer name to view the details.
To filter prospective volunteers, select the status criteria and click the 'Filter' button.

Show prospective volunteers by status: [Print Prospective Volunteers List](#)

Name	Phone	Email	i Submitted On	i Status
swarna kavi	(222)222-2222	skavi@aarp.org	08/25/2009	Pending
swarna kavi	(234)456-7880	skavi@aarp.org	08/25/2009	Pending
VishTestEnv One	(123)456-7890	aarp@aarp.org	08/25/2009	Pending
VishTestEnv Six	(123)456-7890	aarp@aarp.org	08/25/2009	Pending
VishTestEnv Four	(123)456-7890	aarp@aarp.org	08/25/2009	Pending
VishTestEnv Five	(123)456-7890	aarp@aarp.org	08/25/2009	Pending
VishTestEnv Three	(123)456-7890	aarp@aarp.org	08/25/2009	Pending

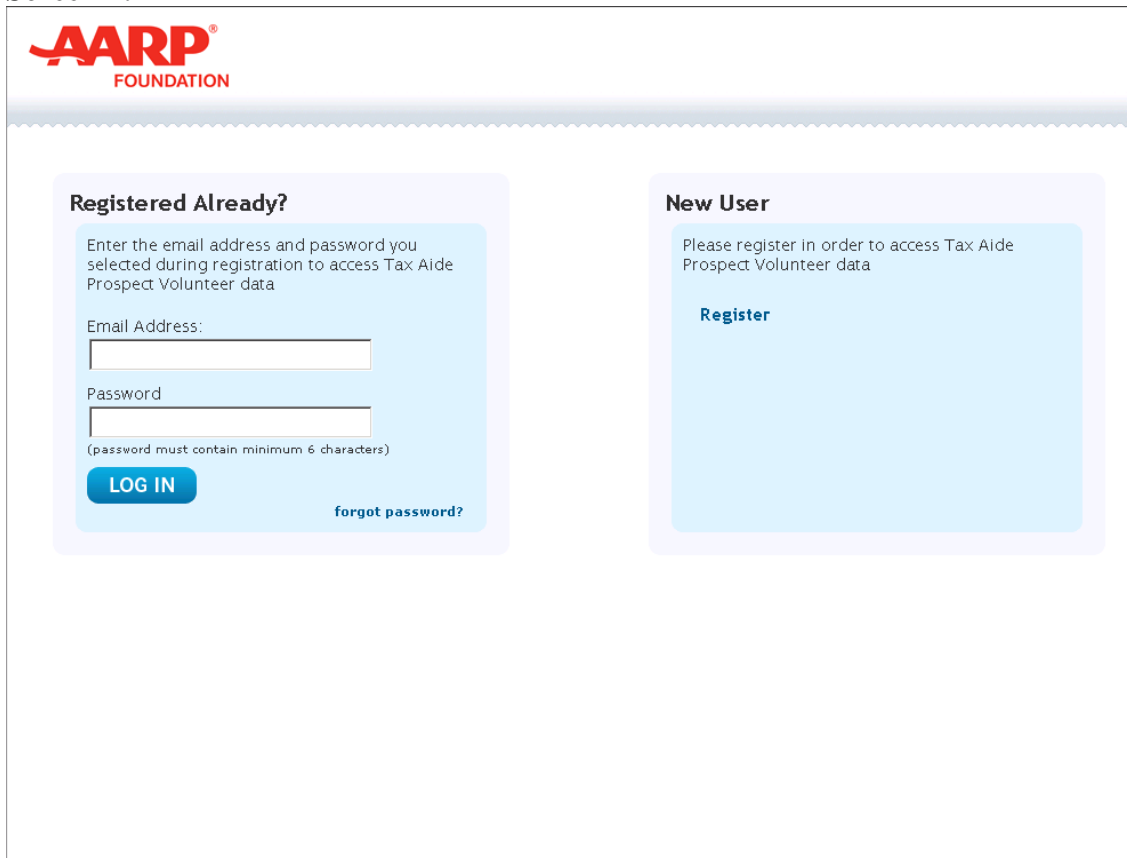
2.0 Volunteer Registration to access Recruitment (internet)

If not registered:

Go to the following location: <https://volunteers.aarp.org/taxaide/internet/> the below screen (Screen 4) will be displayed.

Please click on “Register” link from the login screen.

Screen 4:



The screenshot shows the AARP Foundation login and registration interface. At the top left is the AARP FOUNDATION logo. Below the logo is a decorative horizontal line. The main content area is divided into two columns. The left column is titled "Registered Already?" and contains a light blue box with the text: "Enter the email address and password you selected during registration to access Tax Aide Prospect Volunteer data". Below this text are two input fields: "Email Address:" and "Password". A note below the password field states "(password must contain minimum 6 characters)". At the bottom of this box is a blue "LOG IN" button and a link for "forgot password?". The right column is titled "New User" and contains a light blue box with the text: "Please register in order to access Tax Aide Prospect Volunteer data". Below this text is a blue "Register" button.

The below registration screen (Screen 5) is displayed once the Register link is selected

Screen 5:

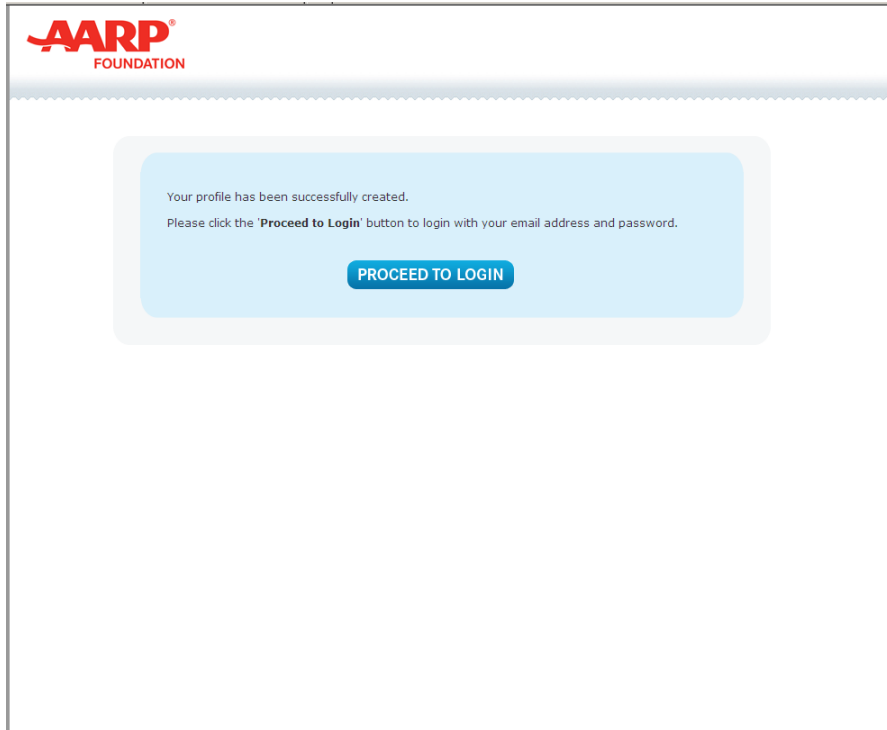
The screenshot shows the AARP Foundation logo at the top left. Below it is a registration form titled "Sign up to access AARP Tax Aide Prospective volunteer information". The form includes several input fields, each with a red asterisk indicating it is required. The fields are: First Name, Last Name, Email Address, Password (with a note: "Minimum of 6 characters and should have at least one numeric character"), Confirm Password, Birthday (with a note: "(mm/dd/yyyy)"), Zip Code, and Volunteer ID. There is a checkbox for "Yes, I agree to the AARP's Terms of Service and Privacy Policy." and two buttons: "SIGN UP" and "CANCEL". A footer at the bottom of the page reads "Copyright 1995-2009, AARP. All rights reserved."

User must enter all mandatory fields to proceed and click Sign Up button when done.

Note: The user must be the following roles to view their recruitment application

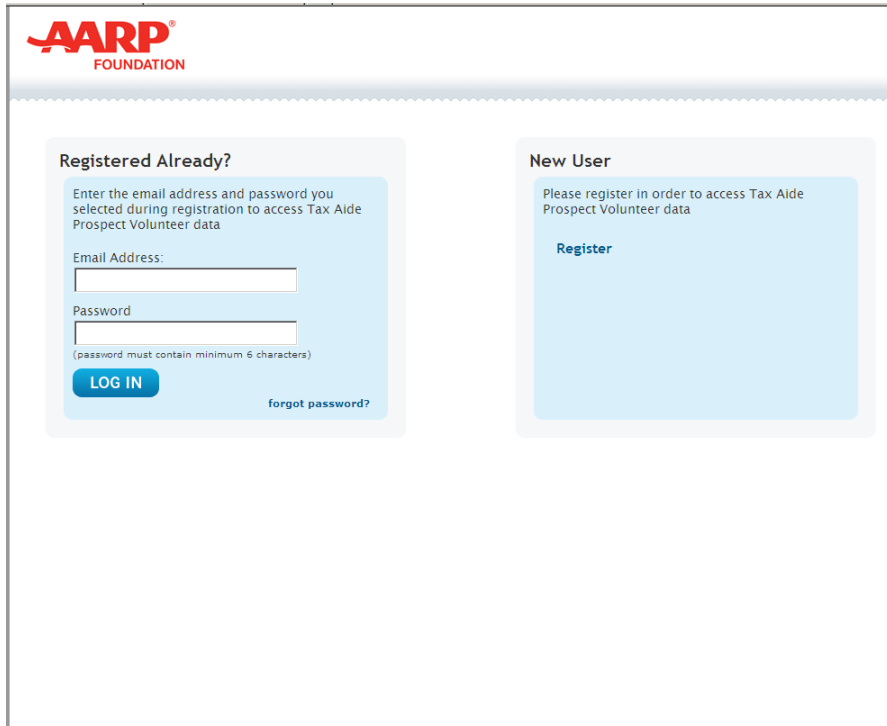
- DC
- ADS
- PVC
- SC

Once registration is completed, the following confirmation screen (Screen 6) is shown
Screen 6:




Clicking the “Proceed to Login” button navigates the user to the login screen (screen 7).
Note: please use the same email address and password created in the registration process.

Screen 7:



Below confidentiality screen (Screen 8) is displayed once the email address and password are entered correctly from the login screen.

Screen 8:




Logged in as: Ronica Krishnan | [Log out](#)

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Clicking Cancel will take the user back to the Login screen. If the user clicks on 'I Agree' the following recruitment main page (Screen 9) will be displayed:

Screen 9:


Logged in as: Arthur Welch | [Log out](#)

AARP TAX AIDE - PROSPECTIVE VOLUNTEERS

i Split State: **VA1**
 State Coordinator **Arthur Welch**
 State Coordinator Email: **ARTWELCH@MSN.COM**

ADS: **Robert Erskine**
 ADS Email: **rfe001@gmail.com**
 PVC: **Joyce Blanton**
 PVC Email: **wblanton@cox.net**

Click on prospective volunteer name to view the details.
 To filter prospective volunteers, select the status criteria and click the 'Filter' button.

Show prospective volunteers by status: [Print Prospective Volunteers List](#)

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VishTestEnv One	(123)456-7890	aarp@aarp.org	08/25/2009	Pending
VishTestEnv Six	(123)456-7890	aarp@aarp.org	08/25/2009	Pending
VishTestEnv Four	(123)456-7890	aarp@aarp.org	08/25/2009	Pending
VishTestEnv Five	(123)456-7890	aarp@aarp.org	08/25/2009	Pending
VishTestEnv Three	(123)456-7890	aarp@aarp.org	08/25/2009	Pending

Trusted sites


By zip-code Tax-Aide Prospective Volunteers (applicants) will be maintained in the queue of (DC/SC/PVC/ADS)

Note: If user has only “District Coordinator” in Tax-Aide Application then he/she will see only “Pending Approval From DC” and “In Progress” statuses of prospective volunteers in the queue.

3.0 Approve/Reject/On Hold/In Progress Prospective Volunteers

After successfully login to Tax-Aide Recruitment by users (DC/SC/PVC/ADS) the following recruitment main page (Screen 10) is displayed.

Screen 10:


Logged in as: Arthur Welch | [Log out](#)

AARP TAX AIDE - PROSPECTIVE VOLUNTEERS

Split State: VA1

State Coordinator **Arthur Welch**

State Coordinator Email: **ARTWELCH@MSN.COM**

ADS: **Robert Erskine**

ADS Email: **rfe001@gmail.com**

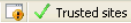
PVC: **Joyce Blanton**

PVC Email: **wblanton@cox.net**

Click on prospective volunteer name to view the details.
 To filter prospective volunteers, select the status criteria and click the 'Filter' button.

Show prospective volunteers by status: [Print Prospective Volunteers List](#)

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VishTestEnv Six	(123)456-7890	aarp@aarp.org	08/25/2009	Pending
VishTestEnv Four	(123)456-7890	aarp@aarp.org	08/25/2009	Pending
VishTestEnv Five	(123)456-7890	aarp@aarp.org	08/25/2009	Pending
VishTestEnv Three	(123)456-7890	aarp@aarp.org	08/25/2009	Pending



By clicking on any existing prospective volunteer in the queue the following screen Detail prospective volunteer page (Screen 11) is displayed.

Screen 11:

AARP FOUNDATION Logged in as: Arthur Welch | [Log out](#)

AARP TAX AIDE - PROSPECTIVE VOLUNTEERS

Split State: **VA1**

State Coordinator: **Arthur Welch** ADS: **Robert Erskine**
State Coordinator Email: **ARTWELCH@MSN.COM** ADS Email: **rfe001@gmail.com**
PVC: **Joyce Blanton**
PVC Email: **wblanton@cox.net**

Prospect Name: **VishTestEnv Three** Age: 0 (123) 456-7890 aarp@aarp.org

123 silk court lee st 2466 Herndon , VA - 20171

<p>Volunteer Experience 12 years</p> <p>Work Experience Apple - VP</p> <p>Volunteering related information Availability: Weekends</p>	<p>Personal Information Languages Known: Greek Ethnicity: Asian/Pacific Islander Highest level of education: Less than high school Current Employment Status: Not Employed Any disability or chronic conditions? Yes Any convictions of crime? Yes</p>
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By selecting the DC is the dropdown list and review the prospective volunteer with any choices (approve/reject/on-hold/in-progress) the selected prospective volunteer will be approved/rejected/maintained in the queue and system will navigate user back to recruitment main page.

4.0 Login to VMIS (Intranet)

Login to the Tax Aide Program and proceed to the Recruitment tab. There will be two options available to the user.

- Add Prospects
- Process Prospects

Screen 12:

The screenshot displays the AARP Tax Aide Program interface. At the top left is the AARP logo. To its right, a black banner contains the text "Welcome AARP Tax Aide Program" in white and yellow. Below this is a navigation bar with tabs: Home, Tax Aide Site Locator, My Report Docs, and Log off. A secondary navigation bar includes Volunteers, Sites, Reports, Labels/Letters, Recruitment, and Help. The Recruitment tab is active, showing a dropdown menu with "Add Prospects" (highlighted in yellow) and "Process Prospects". On the left side, there is a link for "Flat Rate Payments". On the right side, there are five buttons: "All Volunteer Roster", "Leadership Roster", "IRS Download", "Create Letters/Labels", and "Create Mass Mailing Labels". The footer contains links for Privacy Policy, Copyrights 2005, All rights reserved, AARP Programs, Change Password, Feedback, and System Admin.

5.0 Add Prospective Volunteer through VMIS

Select the Add Prospects options from the Recruitment tab. The following screen
(Screen 13)



Welcome AARP Tax Aide Program

[Home](#)
 [Tax Aide Site Locator](#)
 [My Report Docs](#)
 [Log off](#)
[Volunteers](#)
[Sites](#)
[Reports](#)
[Labels/Letters](#)
[Recruitment](#)
[Help](#)

Add Prospective Volunteer

Red titled fields are required.

Honoric
 First Name
 Middle Name
 Last Name
 Suffix
 Nick Name

<p>Address 1: <input type="text"/></p> <p>Address 2: <input type="text"/></p> <p>Address 3: <input type="text"/></p> <p>City: <input type="text"/></p> <p>State: <input type="text" value="Select"/></p> <p>Zip Code: <input type="text"/></p>	<p>Phone: <input type="text"/> - <input type="text"/> - <input type="text"/> Ext. <input type="text"/></p> <p>Email: <input type="text"/></p>
--	---

Show Additional Prospective Volunteer Information

How can we best contact you? (max. 500 characters)

How did you learn about program?

Have you ever completed your own or someone else's tax return?

How comfortable are you using a computer?

Please tell us about your previous Volunteer experience/positions held? (max. 500 characters)

Please list your previous employers and job title

Name of the Employer	Job Title	
<input type="text"/>	<input type="text"/>	<input type="button" value="add"/>

Are you fluent in any language other than English?

When could you be available for help?

Weekdays
 Evenings
 Weekends

What is your year of birth? (yyyy)

What is your ethnicity?

American Indian or Alaskan Native
 Asian/Pacific Islander
 Black or African American
 White/Caucasian
 Hispanic/Latino

Other

What is the highest level of education you have completed?

What is your current employment status?

Do you have any disability or chronic condition that keeps you from fully participating in work, school, house work or other activities?

In the last 10 years, have you been convicted of a crime? (A yes is not an automatic disqualification)

Anything else you would like us to know? (max. 500 characters)

The Add prospective volunteer screen will display. User must enter all mandatory fields marked in red. Note that more field options will be displayed when the **Show Additional Prospective Volunteer Information** link is selected. When done, click the Submit button.

Once the prospect is added, a prompt will be displayed on the Add Prospect Volunteer screen (Screen 14).

Screen 14:

Successfully added prospect volunteer: sonia khurana.

6.0 Process Prospective Volunteers

Select the Recruitment – Process prospects tab

Screen 15:

Process Prospective Volunteer - Search

Prospect Information
Please enter 'First Name, Last Name' OR 'Zip Code' OR 'Split State'

First Name:
Last Name:
Zip Code:
Split State:

OR

District Coordinator Information
Please enter 'First Name, Last Name, Email' OR 'District Coordinator ID'

District Coordinator First Name:
District Coordinator Last Name:
District Coordinator Email:
District Coordinator ID:

Search

Copyright 2002, AARP. All rights reserved. [VMIS Privacy Policy](#).

User can enter prospective volunteer information or district coordinator information to search for approved Prospective volunteers

Upon clicking “Search” approved prospective volunteers will be displayed.

If the “prospective volunteer” is in Konnects or VMIS database system will display the prospective volunteers list as shown in the below screen (Screen 16) **Screen 16:**

AARP™ **Welcome**
AARP Tax Aide Program

Home Tax Aide Site Locator My Report Docs Log off

Volunteers Sites Reports Labels/Letters Recruitment Help

Search Results

Page 1 of 1 Previous | Next | First | Last

Go To Page

2 volunteers found.

Aaron Doe
ASHBURN, VA

ID	Name/Address	Seasonal Address
500049935	Aaron.Doe 234 VMIS Rec.Ter ASHBURN, VA 20147	234 VMIS Rec.Ter VIENNA, VA 22182
500049941	Aaron.Doe.Jr. 1234 Brisbane Cir ASHBURN, VA 20147	26 Mills Rd VIENNA, VA 22182

2 volunteers found. Viewing last page of search results.

Go To Page

Page 1 of 1 Previous | Next | First | Last

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User can click on existing volunteer to update profile information or system will allow adding another volunteer even First name and Last name is same by clicking on Add Volunteer button.

Screen 17:

AARP™ Welcome AARP Tax Aide Program

Home Tax Aide Site Locator My Report Docs Log off

Volunteers Sites Reports Labels/Letters Recruitment Help

Search Results Save Reset

[Add New Volunteer/Assignments](#) **Edit Volunteer & Assignment Information** [Edit Volunteer/Assignments](#)

VishTest02 Jeo Volunteer ID: 50-012-2930
* 204 LEE ST Supervisor Name: ID: 111111111
GAITHERSBURG, MD 20877-2947 Split-State Code: MD1
<<In KONNEX but not a Member>>
* Tax-Aide Address

Red titled fields are required.

Honorific: First Name: Nick Name:
Middle Name: Last Name: Suffix:
Supervisor ID: Tax-Aide Start Year:
Inactive: Reason for Inactive Status:

Address Information

Start and End dates are required for Seasonal addresses.

Address Type: MAILING Tax Aide Address

Address:

Zip Code: - County: District:
City: State: Split-State Code:
Start Date: e.g. mm/dd/yyyy End Date: e.g. mm/dd/yyyy

Done Local intranet 100%

Once approved Prospective Volunteer has been processed the volunteer ID will be provided in the popup message.