

Policy CO1-05: Changing Volunteer Contact Records

Background. The Volunteer Portal Guide provides guidance on managing volunteers (Section 6). In particular, the Guide notes that volunteers should update their own personal information on the Volunteer Portal.

Volunteers receive an email notification when sensitive information is changed on their Contact record. Notifications will be sent when contact information, mailing address, or direct deposit information has changed. The notification will state who made the change and when the change was made.

In addition, supervisors have access to the record history for volunteers they supervise and can see when changes were made to a Contact record and who made the change.

Policy. It is the volunteer's responsibility to maintain accurate information on their contact page. The Administration Specialist (ADS) will not make changes to volunteer Contact records. The district Administration Coordinator (AC) may make changes to Contact records for volunteers in their district, but only by exception.

Implementation. The AC may make changes to the Contact record for volunteers in their district, but only by exception when the volunteer is unable to make the changes themselves. In this situation the AC will obtain permission from the volunteer to make specific changes agreed to by the volunteer. The ADS will provide assistance to the AC as needed when making such changes.

References.

AARP Foundation. *The Policy and Procedures Manual of Tax-Aide, 2017-2018.*

AARP Foundation. *The Volunteer Portal Guide, 2017-2018.*