

February 5, 2014

To: All Tax-Aide Volunteers

From: Stan Marshall, National Operation Committee & Miho Kikujo, Sr. Operations Analyst

Subject: **CyberTax TY2013-03: Tax Season 2014 Volunteer Reimbursements – FAST or slow? and**

Required at Site: VTA 01

The FAST Reimbursement application is now available on the Portal for all volunteers to prepare either Flat Rate or Mileage Reimbursement requests for Training, Counseling, and for leaders, Coordinating activities.

Training – Counseling – Coordinating Expenses during the tax season

All volunteers who do not need to submit receipts for Training – T, Counseling – I, and Coordinating – B expenses during the tax season are expected to use the FAST Reimbursement system on the Volunteer Portal (<http://volunteers.aarp.org>). Beginning on April 1 the FAST Reimbursement system allows supervisors to approve reimbursement requests, or escalate them as policy requires, and allows the AARP National Office to process reimbursements automatically. Using the FAST Reimbursement system payment is ordinarily received within a few days compared to the submission of a paper reimbursement request which takes from four to six weeks from the date of supervisor approval.

FAST can be used by all volunteers to request either Flat Rate or Mileage reimbursement during the dates shown below.

Reimbursement Request Options	Active Dates
Flat Rate (non-leaders - \$35, or leaders - \$50): Portal → Reimbursement → My Reimbursement: Select Flat Rate	Selection: 2/1-5/31
Mileage without receipts (at a selected rate up to \$0.56/mile): Portal → Reimbursement → My Reimbursement: Select Mileage	Selection and Data Entry: 2/1-5/31 Submit Approval Request: 4/1-5/31

Only ONE Flat Rate or Mileage request is allowed per tax season for Training and Counseling reimbursement.

The FAST system is described pictorially in the attachment to this memo and on the Portal/Portal Applications Support tab in a narrated presentation or via Power Point slides with an included script.

If receipts are required to document transportation expenses in addition to mileage expense, it is preferred to use the Excel expense form available on the Portal/ShareNet. Search using the Content Search tab with Key Words “expense reimbursement” and the Title Filter. (Include the quote marks in the search box.)

Mileage rate

For 2014 the maximum allowed mileage reimbursement rate is 56 cents per mile. Thanks to all volunteers who take a lesser rate, flat rate, or no reimbursement at all. It is greatly appreciated!

Other Tax-Aide related expense reimbursements

Only leaders are allowed to submit reimbursement requests for items other than transportation related to Training and Counseling by using the Excel Leader expense form. The procedures for submitting reimbursement requests are described in the Policy and Operations manuals available on the ShareNet.

Direct Deposit

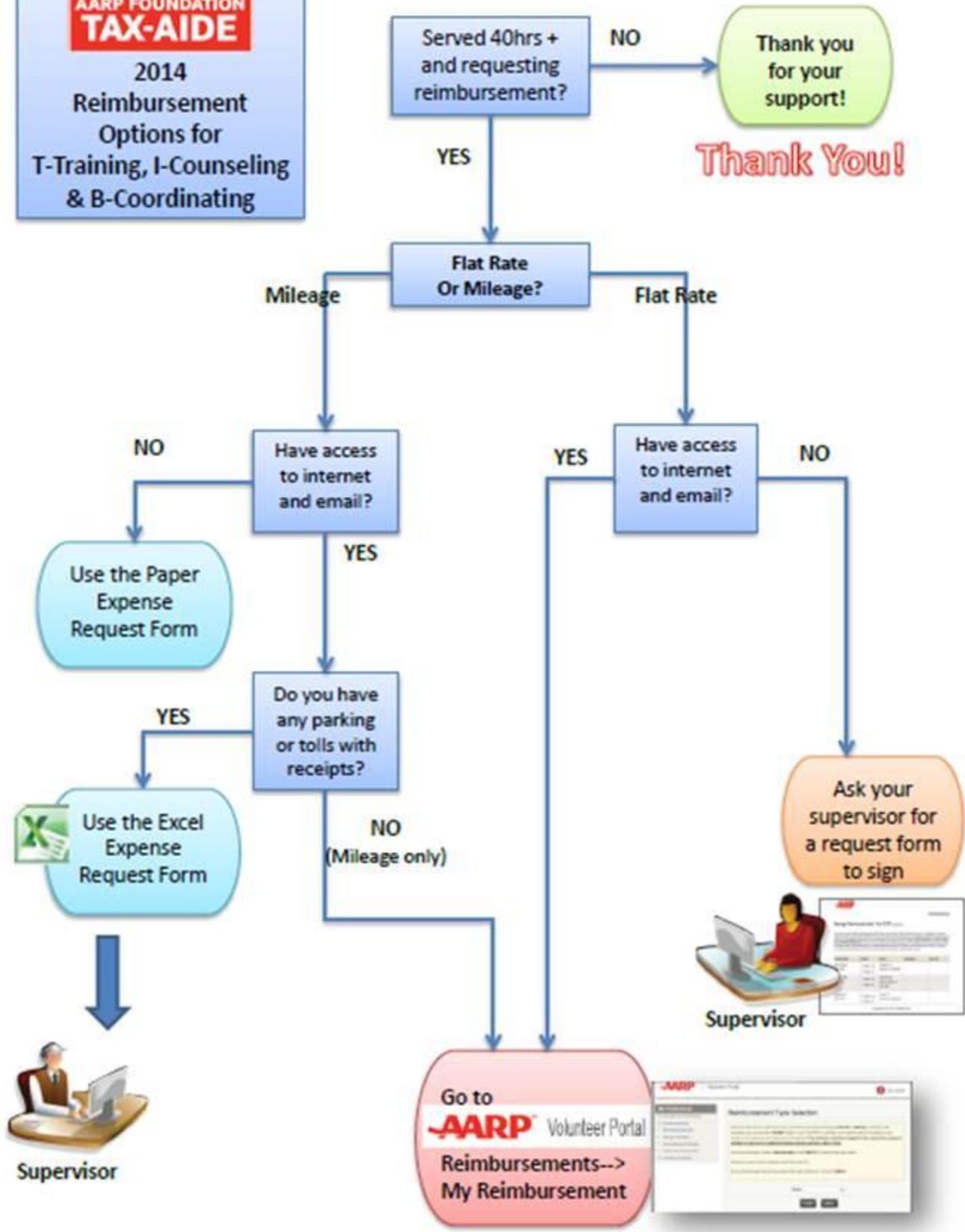
Direct Deposit Request forms are available on the ShareNet. Search using the Content Search tab with Key Words “direct deposit” and the Title Filter. (Include the quote marks in the search box.) Direct Deposit Request forms can be submitted by email after photographing, or scanning, the completed form with a blank check included at the bottom of the form, covering the submission information.

For Support

- Training Webinar: <http://www.brainshark.com/aarp/vu?pi=zGSz2uX2Uz2YLkz0&intk=83988210>
- Training Material: Portal → Volunteer ShareNet → Portal Application Support → Reimbursement
- With Portal Login: Please refer to the steps described below.
- With Reimbursement Status: Please contact your supervisor.

When no receipts are required use FAST reimbursement. - It is FAST!

**AARP FOUNDATION
TAX-AIDE**
2014
Reimbursement
Options for
T-Training, I-Counseling
& B-Coordinating



When There Is a Problem Accessing the Volunteer Portal . . .

To access the Volunteer Portal, please go to <https://volunteers.aarp.org>.

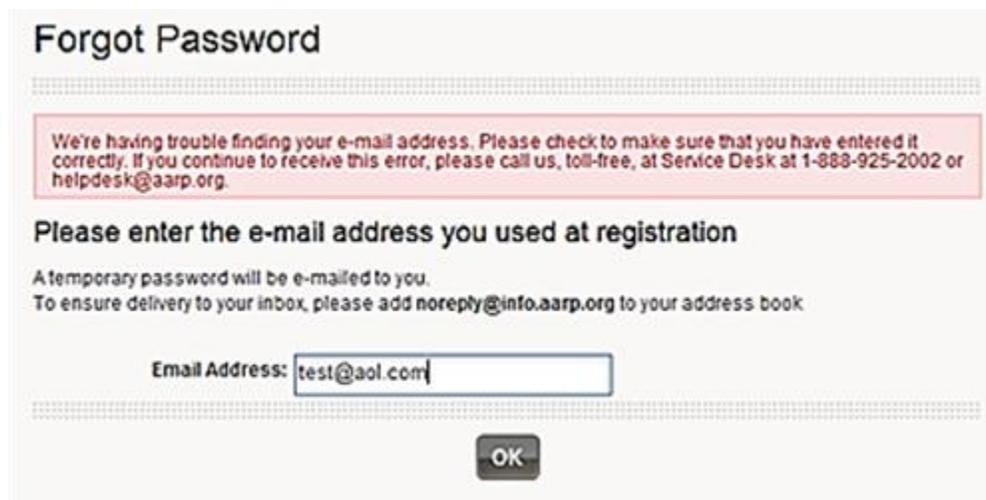
On attempting to login you receive a “**Login failed**” error, you may have forgotten your password, or you may not have a Portal account, go to **Step A**.



Step A → **Step B**

Step A: Click on “Forgot Password? **Click Here**” and follow the steps to obtain a temporary password from noreply@aarp.org. In the event the autoreply does not appear check your SPAM/Junk folder.

If, after entering your Email you receive the message below, then go to **Step B**.



Forgot Password

We're having trouble finding your e-mail address. Please check to make sure that you have entered it correctly. If you continue to receive this error, please call us, toll-free, at Service Desk at 1-888-925-2002 or helpdesk@aarp.org.

Please enter the e-mail address you used at registration

A temporary password will be e-mailed to you.
To ensure delivery to your inbox, please add noreply@info.aarp.org to your address book

Email Address:

OK

Step B: Click on “New User **Register Here**” and fill out your information on the Registration Form. If you do not know your volunteer ID number, contact your supervisor for your Volunteer ID number. If you receive an error, please contact the helpdesk@aarp.org or call 1-888-925-2002 to arrange to update your record in the Tax-Aide database and receive a temporary password by email.

AARP Volunteer Portal Registration Form

* indicates a required field

* First Name:

* Last Name:

* Email Address:

* Password:
(Minimum of 6 characters and should have at least one numeric character)

* Confirm Password:

* Birthday: Month Day Year

* Zip Code:

* Volunteer ID:

Yes, I agree to the AARP's Terms of Service and Privacy Policy.

Volunteer Tax Alert: Also attached to this CyberTax is the first Volunteer Tax Alert. The information in this alert is a summary of the fact sheets that you have probably seen and does not change the guidance that Tax-Aide has sent regarding the issue. However, this CyberTax or at least the attachment should be available at all sites (electronically or in paper) in the event a SPEC or IRS reviewer asks if it is available to volunteers.

Attachments:

CyberTaxTY133020514.pdf (On the ShareNet in General Program Communications>CyberTax Messages)
VolunteerTaxAlert1TY13020514.pdf (On the ShareNet in Manuals Policies and Procedures>Required at Site)