4 – Processing a Prospective Volunteer Ⓔ

Overview

All incoming volunteers' information must be updated within the Volunteer Portal to reflect their status within the program. Adhering to the following process will ensure that the program is operating uniformly and efficiently as well as maintaining accurate reporting.

Topics:

- Prospective Volunteer Applies to Program
    - Update Zip Code Routing
- Prospective Volunteer Becomes a Candidate
- Volunteer Assignment Status and Program Volunteer Status Relationship

Prospective Volunteer Applies to Program

When prospective volunteers apply to the program, their information is routed to a district based on their **preferred zip code**, the zip code in which they would like to volunteer. An email notification is sent to the Prospective Volunteer Specialists (PVS) and District Coordinators of the split-state and district to which the prospective volunteers were routed. However, only the PVS will be receive an email if a prospective volunteer is routed to **D00**, a placeholder district.

Update Zip Code Routing

When prospective volunteers enter the system, they are routed to the district that corresponds to the preferred zip code noted in their application. This routing system is based on a zip code routing table that assigns districts to zip codes. Occasionally, prospective volunteers' zip codes require updates.

In the event that the district routing of a prospective volunteer needs to be changed, the zip code must be updated in the **Route To** field. Changes to the **Route To** field will be reflected in the **Program Route To** field which is also located on the Program Volunteer record. The **Program Route To** field shows the district to which a zip code is assigned and determines to which district the prospective volunteer is sent.

Note: Updates to the zip code in the **Route To** field will not alter volunteers' address records.

It is the responsibility of the PVS, or the designated volunteer leader in your split state, to reassign volunteers to the appropriate district when, for instance, a prospective volunteer is routed to district D00 which is used for zip codes that have no assigned district.

Note: The zip code routing tables are updated annually by the ADSs; however, volunteer leaders may **Submit a request** on the OneSupport Help Center for intermittent updates. The National Office encourages ADSs to provide the PVS, DCs, and/or ACs with a copy of their state's zip code routing table.

To modify the **Route To** value on the Tax-Aide program volunteer record, complete the following steps:

1. Navigate to the prospective volunteer's **Contact** record.

2. Scroll down to the **Program Volunteer** section of the contact record, and click *Edit* next to the Tax-Aide Program Volunteer record.

3. Enter the preferred zip code in the lookup field.

4. Click **Save.**

Prospective Volunteer Becomes a Candidate

The District Coordinator (DC), or the designated volunteer leader in your split state, is responsible for contacting prospective volunteers and determining if the volunteer is an appropriate fit for the program. When determined that the prospect is a good fit for the program, the DC will update the prospect's **volunteer assignment status** to *Candidate*. Doing so will automatically update the **program volunteer status** to *Under Consideration*.

1. Navigate to the prospective volunteer's **Contact** record.

2. Scroll down to the **Volunteer Assignment** section, and click *Edit* next to the Tax-Aide prospective volunteer assignment.

3. Update the **Status** to *Candidate*.

4. Click **Save**.

   Note: The **Is Active** checkbox – located in the **Volunteer Assignment** section - is automatically checked when the volunteer assignment status is *Candidate.*

🤝 Volunteer Assignments				New Volunteer Assignment	
Action	Program	Position	Status	Is Active	Start Date
Edit | Del	Tax-Aide	Prospective Volunteer	Candidate	✓	

Volunteer Assignment Status and Program Volunteer Status Relationship

The chart below shows the automatic update of the **Program Volunteer** status when the **Volunteer Assignment** status is updated.

When the Volunteer Assignment Status is...	The Program Volunteer Status will automatically update to...
Submitted	Prospect
Candidate	Under Consideration