Additional Q&A Regarding the Portal

Why are there no choices for Funding Code (AKA Why is the Funding Code box grayed out)?
There are hundreds of funding codes; too many to show in a drop-down list. To find a code, click on the Search icon (the magnifying glass). Enter the first few letters of the role that you are submitting for (Local Coordinator, counselor, client facilitator, etc). You should see a short list of funding codes that meet that criteria. Unless otherwise instructed, all volunteers should choose the one that says Federal Funds. Do not choose donated funds.

Why am I seeing filled out reimbursements (AKA Why is my reimbursement locked)?
Reimbursements from previous years are not removed from the portal, but remain forever. Volunteers should be sure to choose "New Reimbursement Request" for this tax season. If they believe they are starting a new request and see information already filled out and locked, they are in last year's reimbursement. If they have started a request and go back to it, they should be sure that they are looking at the correct one. If the information is locked they are in last year's reimbursement.

How can I enter itemized expenses for a volunteer (AKA can Ginni enter these for someone else)?
You can't, and neither can I. Sit with the volunteer and assist them to enter their expenses.

How can a volunteer that requested flat-rate reimbursement change their mind and get itemized instead?
They can't. In very rare circumstances, when a supervisor accidentally enters a flat-rate on behalf of a volunteer using the mass approval form, a request can be made for an adjustment, but this is rare.

How can a volunteer that's not listed in the portal (never registered) get reimbursed?
They can't. ALL volunteers must be registered an show as a volunteer at a site to be able to request reimbursement. No, I can't get them registered either. NOTE: There shouldn't be any of these!! This means that they were never reported as certified and should never have been working at a site. You must emphasize to the responsible leader that no one can be a volunteer unless they are a) certified and reported as such, and b) in the portal. One of my last official acts as ADS will be to bring down the wrath of Ginni on all that think they can ignore this requirement.

Once a volunteer has registered, what needs to be done so that they can request reimbursement?
Send me an email with the volunteer's name, the role that they were certified for, and the site that they volunteered at. I will process them and let you know when they are shown as a volunteer, and will also send the invitation to join the portal. At that point the person must follow the one-time process to get portal access. Once that's done they can enter their reimbursement.

What if I have a problem with a volunteer?
Email me with your problem and I'll see if I can fix it. IF not, a ticket will be opened with national. IMPORTANT – Please be very specific on the type of problem. For instance, I recently received an email that asked about "volunteers who are unable to sign onto portal for reimbursement". Two volunteers are specifically named, but there's also a list with 7 volunteers on it. There isn't enough information for me (or anyone else) to work with on this. Is the problem that the volunteer has never registered for the portal? IF so, did they follow the instructions that we pass out? IF not, I can send them an invitation. IF so, what is the specific problem that they ran into (Screen shots are always good). Maybe they logged onto the portal in the past but can't get on now? In that case, what's the specific error, or maybe they forgot their password and just need to click on Forgot Password? Maybe they changed their email address? Or maybe they can log on but are having a problem with entering their reimbursement? As you can see, I need a lot more information before I can help!