



Driver Safety Program

The background of the slide is a long-exposure photograph of a city at night. It shows streaks of light from traffic on a highway, with blue and white lights from the left and red lights from the right. In the background, there are illuminated buildings and streetlights. The overall scene is dynamic and modern.

Expense Reimbursement Express

Volunteer Expense Reimbursement Express

Volunteer Overview

September & October, 2011



Today's Agenda

- ***Expense Reimbursement Express*** Project Overview
- What Is ***Expense Reimbursement Express***?
- What are the Benefits of Using ***Expense Reimbursement Express***?
- How will ***Expense Reimbursement Express*** Work?
- How do Volunteers Use ***Expense Reimbursement Express***?
- What's Next with ***Expense Reimbursement Express***?
- FAQs/Q&A

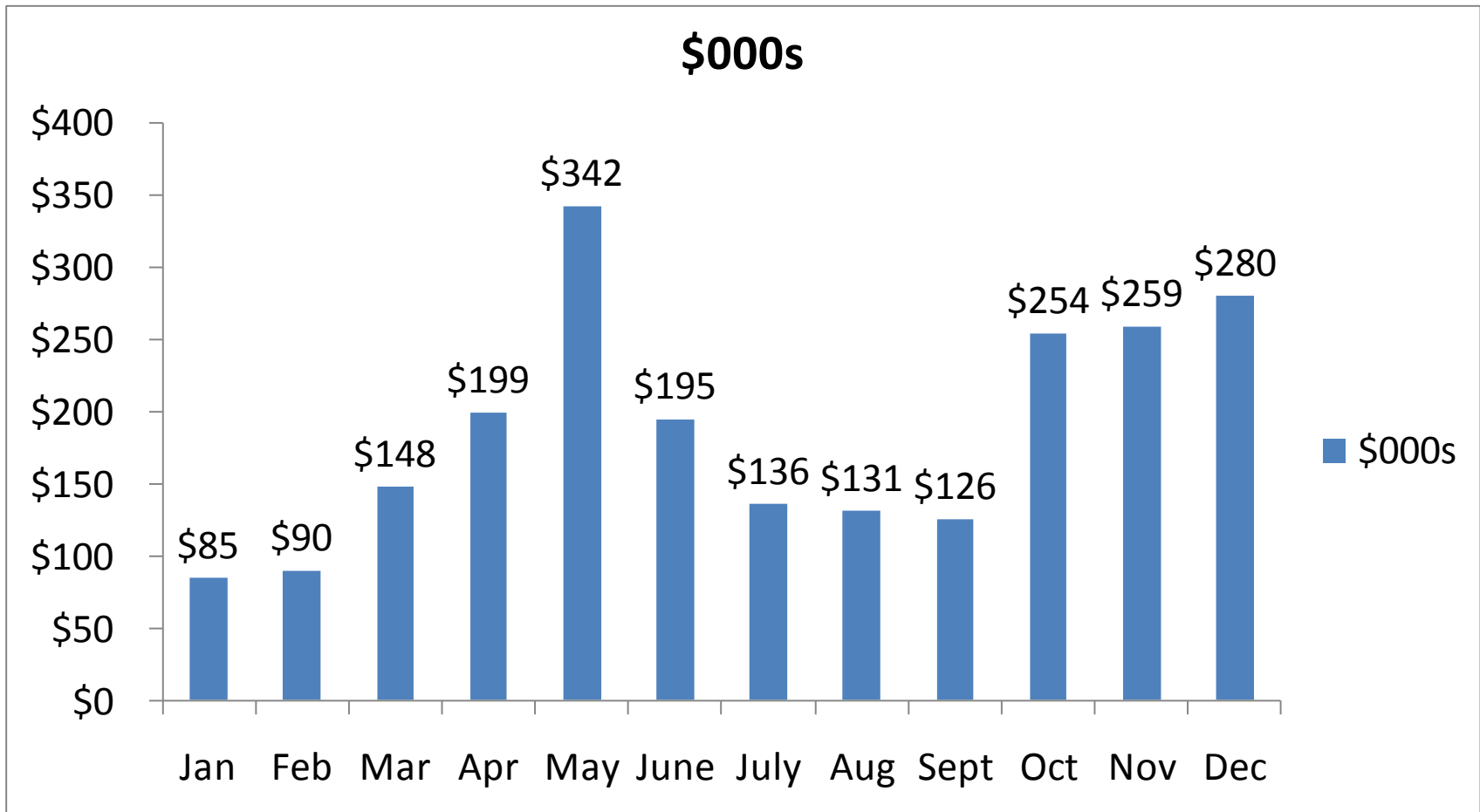
Objectives and Direction

- Simplify the existing process and delete/modify the errors and unnecessary requirements that now bog down the process
 - Building on modifications in receipt and audit rules
- Dramatically reduce the time from Volunteer submission to payment
- Develop a new electronic expense form, utilizing AARP “best practices”
- Provide electronic submission as option and best option to avoid delays, errors and speed payment

Help Yourself. Help Others. Help DSP.

- ***Help Yourself*** – By utilizing the *Expense Reimbursement Express* process, you will greatly reduce the time it takes to prepare and request reimbursement. You can also receive reimbursement faster and easier than ever before.
- ***Help Others*** – By having our most active Volunteers use this option, we will be able to focus more resources on improving service to those who don't or can't yet use *Expense Reimbursement Express*.
- ***Help DSP*** – We expect this program to reduce the time required of Volunteers and Staff to speed reimbursements so that Volunteers can focus more on teaching, increasing participation and adding additional courses instead of expense requests.

Seasonal Expense Demands Drive “Queue” Management



Expense Reimbursement Express Will.....

Volunteers Will be Able to:

- Prepare, electronically submit at least 70% of Itemized expenses in minutes
- Receive payments in less than 21 days
- Receive proactive, immediate notification of payment timing estimates
- Reduce expense errors, miscalculations and expense delays with little or no effort
- Largely eliminate the need for paper copies, receipts, documentation and calls for payment status
- **Focus on driving participation and additional courses, not expense requests**

Staff Will be Able to:

- Proactively manage and control the itemized expense reimbursement process
- Process and approve itemized requests in minutes
- Dramatically reduce paper processing within DSP and with AP
- Dramatically reduce resources necessary to deal with escalations, complaints
- Have access to real time information concerning process volume and status
- Proactively provide and assess expense information and trends

New Volunteer Expense Process Review

Expense Reimbursement Express

- A. **Manual** - new electronic itemized form is mailed in, includes new process and new audit and receipt requirements, as well as National Office staff as approver. **Processed in 30 days (saves 4 weeks!)**
- B. **Electronic** - New electronic itemized form submitted electronically, includes new process and new audit and receipt requirements, as well as National Office staff as approver. **Processed in 21 days (saves 5 weeks!)**

New Process Recommendations and Business Rules

- **Eliminate requirement for all receipt requirements under \$75**
- Receipts can be scanned and emailed or the form can be filled out electronically and “hard copy” receipts attached and form, receipts physically mailed to Staff
- Staff and AP will utilize existing systems electronically to manage work flow, retain information and speed processing
 - Incomplete or missing receipts, information to be returned to volunteer for resubmission, training opportunity
- DSP can view/report on AP progress and communicate in “real time” from the desktop
- Volunteers to use dedicated email Expense Express account
 - DSPExpenses@aarp.org
- Send all questions and inquires after submission to dedicated email account
 - DSPQuestions@aarp.org

New Process Recommendations and Business Rules

- Itemized expense requests to utilize electronic form and “Reimbursement Expense Express” process as preferred but not required option
- Electronic Form to eliminate input, calculation, address, object code and sub ledger errors that lead to delays
 - Includes “pop up” instructions, detailed instruction form
- Portal to be utilized to verify/correct address
- Expense forms and scanned receipts to be emailed directly to Staff
 - ... or mailed after being electronically completed
- Electronic signature of volunteer is required
- **Staff is expense approver, with individual Staff approving by Level of Authority**

AARP Driver Safety Program Standard Activity Expense Statement – Electronic Version

Name:	Joe Jones	Address	1 Main Street		Address checked on portal?	Yes
Volunteer ID#	501111111	City	Anytown			
Phone	(555) 555-1212	State:	Alabama	Zip:	3123	

Program, State or Region of Expense	Alabama	Program Identified: DSP Classroom Course
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Expense Activity	Explanation & Location	Date	Miles	Mileage Cost*	Non-Mileage Expense	Non-Mileage Type of Expense
Driver Safety Program Course	RT Mileage 1 Main St. Anytown to Anytown Senior Center for course Instruction	11/11/11	88	\$48.84		
Driver Safety Program Course	Lunch while Instructing course	11/11/11		\$0.00	\$8.72	Meals
				\$0.00		
				\$0.00		
				\$0.00		
				\$0.00		
				\$0.00		
				\$0.00		
				\$0.00		
				\$0.00		
				\$0.00		
*Mileage rate in use: \$ 0.555				Column Totals:	\$48.84	\$8.72

Grand Total:	\$57.56
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Accounting Code: 1000 - 33520000 - xxxx - 600100 - UA60064 - C

Object Code (used for "xxxx" above):	5851	5852	5853	5854	5855	5856	5857	5858	5860
Amounts from above:	\$ -	\$ 57.56	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

CERTIFICATION: I certify that this statement, amounts claimed and the attached original receipts, if necessary, represent necessary expenses incurred by me while engaged in AARP Driver Safety Program, Carfit or WNTT business.

Type Volunteer Signature	Joe Jones	Date:	11/18/11
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Remember to save a copy for your records

National Office Approver	Date:
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Staff Use Comments Area

How to Submit your Expense Reimbursement Form

- Express Electronic Submission - attach your expense form as an attachment to your email. If you're required to submit receipts they must be scanned in as an attachment and included in the email as well. In the subject line of your email, please include:
 - Full Name, Volunteer ID Number, State (i.e. Joe Jones, 503111111, Maryland)
 - Send the email with any required attachments to: DSPEXPENSES@aarp.org
 - You will automatically receive confirmation that we have received your email and provide you with current information and processing times.
- Express Manual Submission - If you cannot scan and attach receipts, you may submit by mail. However, you must still complete the form electronically (i.e. no handwritten entries), print a hard copy and attach receipts. Mail to:

AARP Driver Safety Program
P.O. Box 93114
Long Beach, CA 90809-3114
- POST SUBMISSION COMMUNICATIONS TO THE NATIONAL OFFICE - If you need to contact us after you've submitted your *Expense Reimbursement Express Form*, email us at: DSPQUESTIONS@aarp.org

To check that your address is correct, please visit the AARP Driver Safety Program Volunteer Portal by going to <http://volunteers.aarp.org>

AARP Driver Safety Program

AARP - Volunteer Portal - Microsoft Internet Explorer provided by AARP

https://volunteers.aarp.org/

File Edit View Favorites Tools Help

AARP - Volunteer Portal

New Portal Users - Register Here | Already registered? Login to Portal?

AARP Volunteer Portal

The AARP Volunteer Portal is an easy to use website that brings all the tools and information about volunteering programs at AARP. Whether it be finding a Tax-Aide Site near you or registering for a Driver Safety Program Course, you'll find it here.

Having trouble with logging in or viewing pages within portal? Please turn off pop-up blocker and if you are using Internet Explorer 9 please enable Compatibility View setting within Tools Menu. [Click here](#) For more details. If additional assistance needed, please contact helpdesk at 1-888-925-2002 or helpdesk@aarp.org.

AARP Tax-Aide Program 

About the program

The AARP Tax-Aide is a free Volunteer run tax preparation and assistance service available to taxpayers with low and moderate income, with special attention to those, age 60 and older.

Volunteer with Tax-Aide

We are always looking for qualified volunteers to help us serve the elderly community file their taxes. Submit an application to volunteer for AARP Tax-Aide. [Apply Now](#)

Find a Tax-Aide site nearest you 

Use our "Site Locator" to find the AARP Tax-Aide site nearest you. [Find Now](#)

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Trusted sites 100%

start AARP - Volunteer Por... Microsoft PowerPoint ... 9:30 AM

If it is your first time visiting the Portal, and if you have never created an account on aarp.org, click on **New Portal Users – Register Here** to create your account. If you have done either of these, you can proceed straight to logging in

AARP Driver Safety Program



AARP - Volunteer Portal - Microsoft Internet Explorer provided by AARP

https://volunteers.aarp.org/

File Edit View Favorites Tools Help

AARP - Drivers Safety Progr... Web Slice Gallery AARP - Drivers Safety Progr... AARP - Drivers Safety Progr... AARP - Drivers Safety Progr...

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start | AARP - Volunteer Por... | Microsoft PowerPoint ... | Trusted sites | 100% | 9:30 AM

Fill in all the information on the next page, every field is required.

The information you provide here should match what is on record for you in VMIS (the DSP volunteer information system). Once you have finished entering in your information, click

Sign Up

at the bottom of the screen to create your Volunteer Portal Account.

The screenshot shows a web browser window titled "AARP Volunteer Portal - Registration - Microsoft Internet Explorer provided by AARP". The address bar shows the URL "https://volunteers.aarp.org/portal/core/flow/register?execution=e1s1". The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The address bar also contains a search icon and "Live Search". The browser's toolbar shows several tabs, with the active one being "AARP Volunteer Portal - Registration". The main content area displays the "AARP Volunteer Portal" logo and the title "Volunteer Portal". Below this is a registration form titled "AARP Volunteer Portal Registration Form". The form includes a legend: "* indicates a required field". The form 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. At the bottom of the form is a checkbox labeled "Yes, I agree to the AARP's Terms of Service and Privacy Policy." Below the checkbox are two buttons: "SIGN UP" and "CANCEL". At the very bottom of the page, there is a copyright notice: "Copyright 1995-2010, AARP. All Rights Reserved." The browser's status bar at the bottom shows "Done", "Trusted sites", "100%", and the system clock "9:31 AM". The Windows taskbar at the bottom shows the Start button and several open applications, including "AARP Volunteer Port..." and "Microsoft PowerPoint ...".

After completing the registration process, you will be taken back to the Volunteer Portal Home Screen. To sign into the Portal, click on **Already Registered? Login to Portal?**

AARP Driver Safety Program

The screenshot shows the AARP Volunteer Portal website. At the top, the browser title is "AARP - Volunteer Portal - Microsoft Internet Explorer provided by AARP" and the address bar shows "https://volunteers.aarp.org/". The navigation bar includes "New Portal Users - Register Here" and "Already registered? Login to Portal?". The main content area features the AARP logo and a group photo of diverse volunteers. A yellow information box provides troubleshooting instructions for login issues. Below this, there are two columns: "AARP Tax-Aide Program" and "AARP Driver Safety Program". Each column has an "About the program" section and a "Volunteer with..." section. At the bottom of each column is a "Find a..." button with a magnifying glass icon. The Windows taskbar at the bottom shows the Start button, taskbar icons for the browser and PowerPoint, and the system tray with the time 9:30 AM.

AARP | Volunteer Portal

New Portal Users - Register Here | Already registered? Login to Portal?

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Volunteer with Driver Safety Program

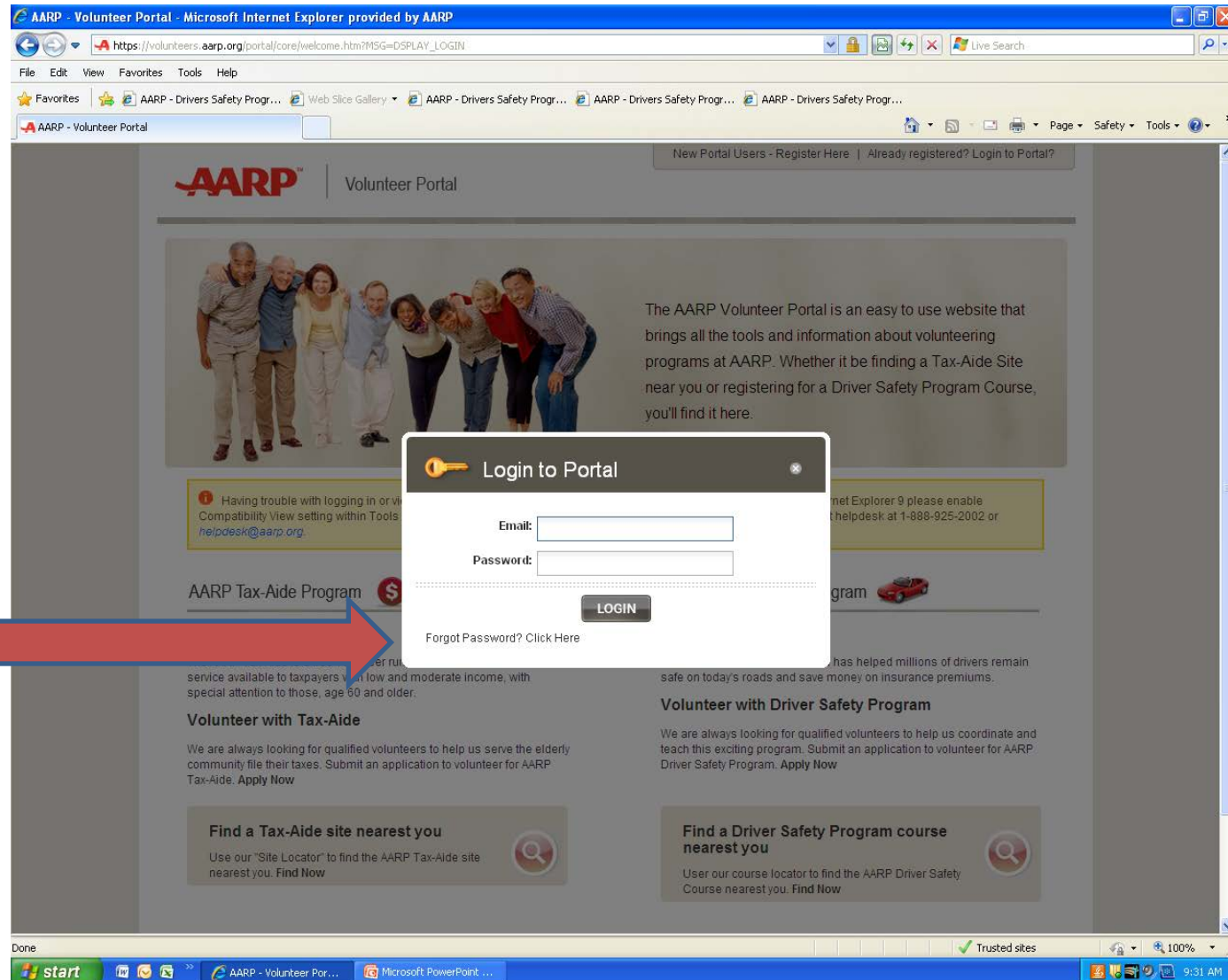
We are always looking for qualified volunteers to help us coordinate and teach this exciting program. Submit an application to volunteer for AARP Driver Safety Program. [Apply Now](#)

Find a Driver Safety Program course nearest you

User our course locator to find the AARP Driver Safety Course nearest you. [Find Now](#)

AARP Driver Safety Program

To login, use your email that you entered in when you signed up for the Volunteer Portal and enter in the password that you created originally. If you ever forget your password, click on the **Forgot Password? Click Here** button and a temporary password will be emailed to you



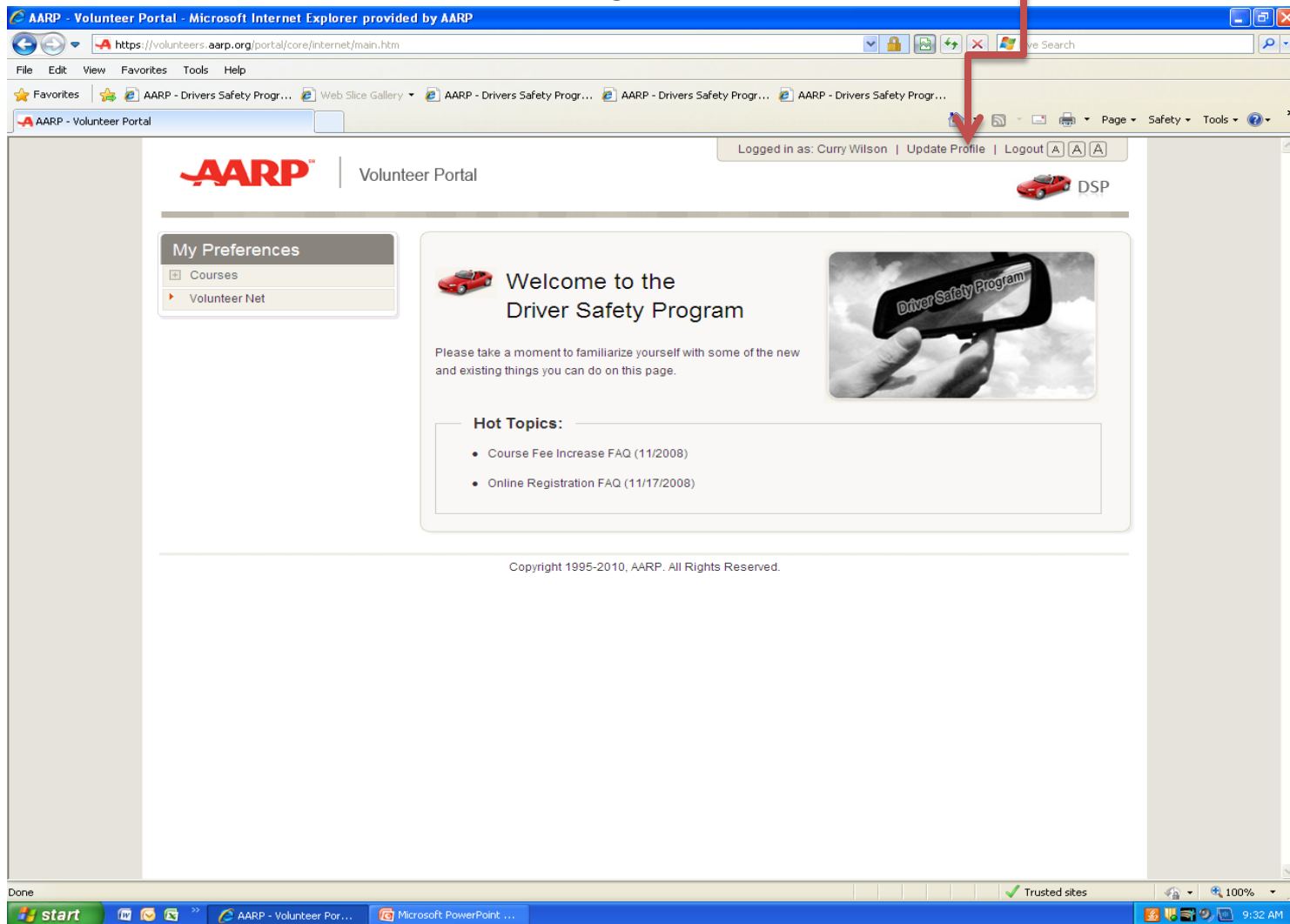
The screenshot shows a Microsoft Internet Explorer browser window displaying the AARP Volunteer Portal. The address bar shows the URL: https://volunteers.aarp.org/portal/core/welcome.htm?MSG=DISPLAY_LOGIN. The page features the AARP logo and the text "Volunteer Portal". A modal window titled "Login to Portal" is overlaid on the page, containing the following fields and buttons:

- Email:
- Password:
- LOGIN button
- Forgot Password? Click Here link

The background page includes a group photo of volunteers, a "New Portal Users - Register Here" link, and a "Already registered? Login to Portal?" link. Below the photo, there is a message: "The AARP Volunteer Portal is an easy to use website that brings all the tools and information about volunteering programs at AARP. Whether it be finding a Tax-Aide Site near you or registering for a Driver Safety Program Course, you'll find it here." There are also several promotional banners for "AARP Tax-Aide Program" and "Volunteer with Driver Safety Program".

After you login, you will be taken to your personal Volunteer Portal Homepage. To check that your address is correct in the DSP system, click on the **Update Profile** button.

Note: Unless you have been trained in the Volunteer Portal use, please do not go to the **Courses** tab



The address that is shown in this box is the one that the AARP Driver Safety Program has on file for you, and is the same one that will be used for the Expense Express process. If this address is correct, please hit the **Cancel** button so you do not make any changes. If this address is not correct, please type in your new address and hit the **Update** button. This will update your address for the Expense Express process.

The screenshot shows a web browser window titled "AARP - Volunteer Portal - Microsoft Internet Explorer provided by AARP". The address bar shows the URL "https://volunteers.aarp.org/portal/core/internet/main.htm". The browser's address bar and menu bar are visible. The main content area of the page is titled "AARP Volunteer Portal" and includes a navigation menu with "My Preferences", "Courses", and "Volunteer Net". A "Welcome to the" message is displayed. A modal window titled "Update Profile: Curry Wilson" is open, showing the following information:

Volunteer ID: 500143444 Member ID: 0

Mailing Address

* Address Line 1: 1422 FALLSMEAD WAY
Line 2:
Line 3:

* City: POTOMAC * State: Maryland * Zip: 208545527

Residential Phone Number

Phone Number: 202 - 434 - 6020

Buttons: UPDATE, CANCEL

The Windows taskbar at the bottom shows the Start button, several application icons, and the system tray with the time 9:32 AM and 100% zoom level.

Communication Plan and Next Steps

- Updates in Leadership Link (**September-December**)
- Updates in the Pilot Communicator (**September-December**)
- Updates in DSP News (**Q4 2011 issue**)
- Trainer/Chief Trainer Updates (Email October)

- Volunteer , Staff Reporting and Analysis via Email Updates to RC, SC

- **Questions/FAQS** about *Expense Reimbursement Express*