FAST Reimbursement Frequently Asked Questions

General Reimbursement FAQ

	Question	Answer
1	Does the Tax-Aide program reimburse volunteers for costs they incur to volunteer with the program?	Program funds **were never intended to reimburse volunteers for the total cost** of volunteer participation, but were rather to insure that those who wished to volunteer would not be excluded due to their income limitations. **Non-Leader Volunteers** (SCO, ERO, COU, CF, Non-Counselor) who have 40 hours of service (excluding Training and Travel), are eligible for transportation expense reimbursement (mileage, parking, toll, public transportation) for Training and Counseling activities **only**. **Leader Volunteers** are reimbursed for transportation expenses (mileage, parking, toll, public transportation) for Training and Counseling activities and other expenses. Refer to the Policy Manual posted on the ShareNet → Policies & Procedures → Manuals Policies and Procedures for allowable expenses and expense coding guidelines. If an expense is **not explicitly** authorized in the **Policy Manual**, assume that it is not allowable. Volunteer supervisors approve all expense reimbursement requests. The State Coordinator will provide expense reimbursement approval limit guidelines
2	What are the reimbursement options?	**Volunteers have three expense reimbursement options** 1) No Reimbursement 2) Flat Rate Reimbursement ($35 – non-leaders & $50 –leaders) 3) Itemized Reimbursement • **Non-Leaders** – transportation expenses only • **Leaders** – transportation and other expenses
3	How does a volunteer request reimbursement?	Currently, depending on the type of expense and whether the requesting volunteer is a leader or non-leader, there are a variety of ways to submit reimbursement requests. See **Table 1** below.
4	When a payment check is mailed do volunteers get an email notification?	No. Only with the Direct Deposit option is it possible to receive a confirming email.
5	When payment is made by direct deposit do volunteers receive an email notification?	If you provided your email address upon setting up the Direct Deposit account, an email is sent notifying you that funds have been submitted to the bank. It may take a few more days before the funds become available in your bank account.
6	Can I receive a direct deposit to a Saving account?	Yes. However, the Direct Deposit Request Form must be accompanied by a letter from the bank on their letterhead identifying their routing number and your account number.
7	Where is the Direct Deposit Request form?	ShareNet→General Program Management and Forms→ Resource Materials →Direct Deposit Form (You may need to scroll down the page to find the Direct Deposit Request Form.

	Question	Answer
8	Can I still request Direct Deposit?	Yes. While it is best to submit a Direct Deposit Request form at least 4 weeks prior to payment of a reimbursement request a check will be issued if the request has not been processed. Once a Direct Deposit arrangement has been established it will continue to be valid until new instructions are submitted to the Accounts Payable Department at AARP.
9	How can I verify whether my Direct Deposit request is active?	Unfortunately no acknowledgement is provided when a Direct Deposit arrangement is initiated. If an email acknowledgement is requested when the Direct Deposit arrangement is initiated a notice will be sent when reimbursement funds are released to your bank.

Table1: 2013 Expense Request Methods

2013 Expense Request Methods:		**Sign CFR**	**Portal - My Reimbursement**	**Non-Leader Excel Form**	**Leader Excel Form**
Payment Sent: (from supervisor's approval date)		7-14 days	7-14 days	6 weeks	6 weeks
Non-Leaders	Flat Rate	X	X		
	Mileage w/o Receipts		Preferred	X	
	Mileage w/ Receipts			X	
Leaders	Flat Rate				X
	Mileage w/o Receipts (B, I, T Expenses only)		Preferred Available 4/1 - 5/31Only		X
	Mileage w/Receipts (Any Expense Type)				X
	Other Expense Types				X

Flat Rate Submission & Approval

	Question	Answer
1	How do Counselors, Client Facilitators, EROs and SCOs (non-leaders) request the $35 Flat-Rate Reimbursement?	Non-leaders may request flat-rate reimbursement in one of the two following ways - **they should not do both.** A. Sign the CFR form supplied by their supervisor, **or** B. Use the Portal My Reimbursement application and select the Flat Rate option. Request must be submitted no later than May 31.
2	How do Leaders request the $50 Flat-Rate Reimbursement?	Volunteers with leader titles must submit a paper request using the Leader Excel Statement available on the ShareNet → General Program Mgmt. and Forms → Resource Material
3	What is a CFR form?	The Counselor Flat Rate (CFR) form lists all volunteers reporting to a specific supervisor. The CFR form is used by volunteer leaders to capture non-leaders requests, i.e., signatures, for flat rate reimbursement. Volunteers who wish to forego expense reimbursement or request mileage reimbursement **do not sign** the CFR form.
4	I'm a supervisor, how do I print the CFR form?	To print the CFR form, • After April 1st, log on to the Volunteer Portal • Open the Reimbursement menu and click on **Review/Approve Flat Rate**. • The first screen displayed is titled Manage Reimbursement. Click on the "Print Reimbursement" option on the right side of the Manage Reimbursement screen.
5	I printed the CFR, however, one of the volunteers working at my site is not listed. Why does that happen, and what do I do about it?	Only volunteers whose volunteer record in our database, VMIS, shows you as their supervisor will be printed on your CFR. • If the volunteer also works at other sites, managed by a different LC or DC, it is possible they are listed as reporting to the other leader. Notify your supervisor to verify that the volunteer is listed as reporting to another leader on the state roster. • If the volunteer has a title in addition to Counselor, Non-Counselor, Client Facilitator, ERO or Shift Coordinator, they report to the District Coordinator or the State Coordinator. As leaders, they do not sign a CFR form. • If the volunteer only works at your site and should be on your CFR, notify your supervisor who must ask the State Administration Specialist (ADS) to update the listing of the volunteer's supervisor in the volunteer record. Once the update has been made, you may print a new CFR.

	Question	Answer
6	Now that I've printed the CFR, what's next?	Local Coordinators should contact each volunteer listed on the CFR to determine if the address listed is accurate and ask if the volunteer would like to request Flat Rate reimbursement. Volunteers wishing to take Flat Rate reimbursement sign the CFR form. **Those who will forgo reimbursement or request mileage reimbursement do NOT sign the CFR form.** It is the supervisor's responsibility to confirm that each volunteer requesting reimbursement has provided 40 hours of service at a site or sites (not including travel or training hours).
7	A volunteer reporting to me indicated on the CFR that their address is incorrect. How does the address get changed so that their reimbursement check goes to the correct address?	Supervisors may update the mailing address for any volunteer subordinate. • Click on "Update Address" under the "Volunteer Records Menu" • Click on the volunteer's name • Click on the address to be updated (Make sure the Tax-Aide Address indicator is selected) • Update address information and click on "OK" • Confirm the new address and click on "Save" which will update the volunteer's record.
8	If a volunteer uses the Portal "My Reimbursement" application to request Flat Rate reimbursement, will the submission of the request automatically initiate a reimbursement?	**No**. Regardless of which method a non-leader uses to request the flat-rate reimbursement, the volunteer's supervisor must approve and submit the request using the portal application **Review/Approve Flat Rate**. If a non-leader uses the portal **My Reimbursement** application to request Flat Rate reimbursement, the system generates an auto-email to the volunteer's supervisor notifying them that the volunteer has requested a Flat Rate reimbursement. To ensure you receive these emails directly and not in a spam folder, it is recommended that you add the following email address to your contact list. no-reply@aarp.org If a leader uses the Portal **My Reimbursement** application to request Flat Rate reimbursement, the system generates an auto-email also. As a supervisor you will not see their name on your CFR. **Volunteers with leader titles must submit a paper request using the Leader Excel Statement available on the ShareNet → General Program Mgmt. and Forms → Resource Material** When supervisors receive the email, it should be printed and attached to the CFR. **IMPORTANT NOTE: The supervisor must use the Approve/Submit Flat Rate application to Approve and Submit the Flat Rate request to the National Office for each volunteer who signed the CFR or provided a confirming email.**

	Question	Answer
9	Which Portal menu do I use to approve and submit Flat Rate requests to the National Office for volunteers reporting to me?	Use the **Review/Approve Flat Rate** menu item under Reimbursements.
10	Is there training to guide me on how to approve and submit Flat Rate requests?	Yes. Training modules are available on ShareNet → Portal Application Support → Reimbursement. The training for approving and submitting flat rate requests is titled: **FAST Reimbursement Flat Rate Approval 2013**.

Mileage Submission & Approval

	Question	Answer
1	If a volunteer selected Mileage reimbursement through the FAST system but changed their mind and would like take either no reimbursement or Flat Rate reimbursement, what do they do?	**Volunteer has not submitted request:** If the volunteer wishes to take no reimbursement then they can just leave the mileage reimbursement request entry as is and do nothing. If the volunteer wishes to take Flat Rate instead, leave the mileage entries as is and do not submit. Non-Leaders need to sign a CFR provided by their supervisor; Leaders must submit an Excel/paper reimbursement request. **Volunteer has already submitted request for approval:** The volunteer must notify their supervisor that they have changed their mind and ask that the mileage request be rejected. If request has already been approved then the reimbursement check (or a check in the amount of a direct deposit) must be return to the National Office. If the volunteer would like the Flat Rate reimbursement, they should either sign a CFR supplied by their supervisor or submit a paper/Excel statement with a $35 Flat Rate request to their supervisor.
2	When can I submit a mileage reimbursement request?	Volunteers may submit itemized mileage reimbursement requests from 4/1 through 5/31. Both the supervisor and submitter will receive email notifications acknowledging submission.
3	When can supervisors start approving mileage reimbursement requests?	Beginning on 4/1 and continuing through 6/30 supervisors can approve or reject itemized mileage reimbursement requests using the Portal→ Reimbursement →Review/Approve Mileage. Supervisors have 7 days to approve or reject the request. *If no decision is made, the request will be automatically escalated to the next level supervisor.*

4	Can volunteers submit training ("T") and counseling ("I") mileage expenses using the Portal and later submit additional I and T related expenses using the Excel expense form from the ShareNet? Note: A paper form may be downloaded from the ShareNet if there is no access to Excel.	Only one reimbursement request for training ("T") and counseling ("I") expenses, per volunteer, is allowed each grant year (10/1 – 9/30). If a volunteer has **only** mileage expenses associated with training and counseling activities, they should use the FAST system to submit their request. If a volunteer has parking and/or tolls in addition to mileage expenses associated with training and counseling activities, they should NOT use the Portal FAST system. They should submit **all** training and counseling expense requests using the Excel/paper form.
5	I can't find the entries I made previously.	Use the scroll bar in the Detail section to view all sites listed and the smaller scroll bar for each site to view all entries for that site. You may also use the "Export Expense Details" feature to export the data in CSV format to Excel for easier review of all the entries.
6	I don't see the Next or Submission button. Why?	The buttons for NEXT or SUBMIT are available beginning on April 1. If it is after April you do not have a total of 40 hours of service in the B and I expense categories which is the minimum hours required to qualify for reimbursement.
7	I received training at a non-Site location how do I enter the mileage and hours?	Select your most frequently visited site and enter the mileage under that location using the T-Training activity code.
8	Can I count travel time and training hours toward the 40 hour minimum requirement for reimbursement eligibility?	Volunteers must have 40 hours of service **excluding both travel time and training hours,** validated by their supervisor, to be eligible to receive any reimbursement.
9	Where is the training material to learn about expense reimbursement?	All the training material can be accessed at Portal → Volunteer ShareNet → Portal Application Support → Reimbursement. Please click on the Reimbursement menu at the bottom of the screen to display the list of training materials. Brainshark.exe files are record webinars. The same material is also available in PDF format. *When downloading a Brainshark presentation it is necessary to rename the file before saving it by adding ".exe" at the end of the file name. Most email programs prohibit downloading executable files that come with a ".EXE" at the end of the file name.*
10	How can I select the mileage rate at which I agree to be reimbursed?	On submitting a reimbursement request the Portal allows the selection of the mileage reimbursement rate in five cent increments up to 56.5cents per mile for 2013 mileage reimbursement.
11	How often can I enter mileage?	You can enter mileage daily or all at once until 05/31.
12	Are we still allowed to use the Excel statements that are available on the Portal ShareNet?	Yes, however **we strongly encourage the use of the FAST system for faster payment** and to provide valuable data to identify sites, service dates, hours and mileage driven.

	Question	Answer
13	I try to always combine my site visits to save mileage but I can't see how to account for a multiple stop trip on the new system. Could you help me?	As long as you account for the different sites you visited by adding an entry for each site, the Portal system will provide an accurate count of the total mileage for your reimbursement summary. For instance if you visited 4 sites in one day, take the total number of miles you traveled and allocate the miles to each site you visited. (Keep in mind that each mileage entry also requires a time entry of at least 1 hour.)
14	I don't see any of my subordinate's submissions.	Have you received an email notification confirming the volunteer's submission? Once a request is entered into the Portal supervisors have 7 days to approve or reject the request. *If no decision is made within 7 days, the request will be automatically escalated to the next level supervisor and you no longer have access to the data through Portal.*

	Question	Answer
15	What do I do with the request that exceeds our state cap for I-Expense form my subordinate?	For those "I" expenses that exceed the state cap that require SC approval, click on **Escalate** immediately. Subsequent supervisors all the way to SC also need to escalate or the request will be automatically escalated to the next level up if no action is taken within 7 days. Manual escalation will speed up the approval process and payment to the volunteer. As required by our policy, there should be pre-approval for such expenses by the SC in advance.