

New Volunteer Orientation – Read this first

The National Recruitment & Outreach Committee (NROC) has developed a New Volunteer Orientation Packet culling together content from Districts that have successfully offered similar events.

These are sample resources that you can customize and use as you like and are not meant to prescribe how this orientation must be conducted.

Many Districts have found that holding an orientation for new counselors prior to their Dec/Jan training classes may increase the likelihood of the new counselor successfully completing the training. The orientation can help give new counselors a headstart in areas such as logging into TaxSlayer and the Portal, as well as completing a simple tax return. These would generally be held in the Oct-Dec timeframe during peak recruiting season, and, if conducted before mid-November, would use the prior tax year software and tax law.

Districts that currently conduct a New Volunteer Orientation have found that including experienced volunteers and members of District leadership works well to familiarize volunteer prospects with the culture of AARP Foundation Tax-Aide, and provide an extra layer of comfort in the availability of support and mentorship during training.

We suggest conducting a New Volunteer Orientation for prospective volunteers who have already been pre-screened by phone and/or email and are at least generally aware of program requirements (“candidates” in portal).

This sample New Volunteer Orientation package contains several resources. Each document is meant to be customized based on the needs of your District.

Invitation to New Volunteer Orientation (template)

New Volunteer Orientation Agenda (template)

Sample Login Instructions (template)

Sample New Volunteer Orientation PowerPoint (template)

Instructions for using WebEx with New Volunteer Orientation

Sample Invitation to New Volunteer Orientation

Welcome to AARP Foundation Tax-Aide!

We are delighted that you have expressed interest in volunteering with AARP Foundation Tax-Aide! To be sure this program will meet your goals and expectations, we invite you to attend the following New Volunteer Orientation:

When: {_____}

Where: {_____}

Your orientation will include the following:

- An overview of the national and local AARP Foundation Tax-Aide Program
- What is included and expected of you in training and certification
- Introduction to the requirements of the January training plan

If you are interested but not able to attend the orientation, or no longer interested in volunteering with AARP Foundation Tax-Aide, please reply to this email.

We look forward to having you join our team!

**AARP Foundation Tax-Aide
Arizona New Volunteer Orientation - Virtual**

{location, date}

10:00 AM – 5:00 PM

SAMPLE AGENDA

<u>Topic</u>		<u>Time</u>
INTRODUCTION	{Instructor}	10:00AM – 10:45AM
Team Member Introduction		
New Volunteer Introduction		
AARP Foundation Tax-Aide Program		
Typical Day at Tax-Aide Site	{Instructor}	10:45AM – 11:00AM
Tax-Aide Reality Check	{Instructor}	11:00AM – 11:30AM
Key Documentation	{Instructor}	11:30AM – 11:45AM
Introduction to Certification	{Instructor}	11:45PM – 12:15PM
Computer Requirements		
AARP Portal knowledge		
	BREAK	
Logging into AARP Portal	{Instructor}	12:15PM – 12:45PM
Navigating the AARP Portal	{Instructor}	12:45PM – 1:15PM
Demo of Training Requirements	{Instructor}	1:15PM – 2:00PM
Policy & Procedure		
Standards of Conduct		
Link & Learn Introduction (OPTIONAL)	{Instructor}	TBD
L&L is only for New Volunteers with prior Tax Experience that will handle tax documents, such as scanning. These Volunteers will need to use L&L to certify for Intake Interview & QR certification.		

Questions, Discussion, Wrap-up

**AARP Foundation Tax-Aide
Arizona New Volunteer Orientation**

{Date}

**Sample Login Instructions and
Web References**

For use at home:

Volunteer Portal:

**Demo new volunteer login process at volunteers.aarp.org
(May need to contact Member Services at 1-866-839-0463)
Document in the AARP Portal for new volunteer portal log in**

Go to Libraries > Training to view training requirements

IRS:

For Link and Learn lessons linklearncertification.com

Create an account, then go to lessons.

(Instructors provide L&L new volunteer account set up instructions)

User ID: _____

Password: _____

For IRS publications go to irs.gov; select Forms and Instructions; Download Publication 4012

Practice Lab – For New Volunteers with prior Tax Experience ONLY

Go to vita.taxslayerpro.com Then select Practice Lab.

On the initial login screen enter TRAINPROWEB (all caps,)

Next, login using the username and password provided. (Do not change your username or password.)

Contact an instructor for the Username and Password or if you are locked out.

User Name: _____

Password: _____

Suggested Pre-Orientation Prep

In order for a New Volunteer Orientation to proceed with the fewest delays possible, make sure to have as many things prepared ahead of time as possible:

- Check your Virtual Google Meet pre-meeting notices.
 - Send the Google Meet Overview to all participants so they know how to operate the screen
- Assign advanced prospective volunteers (those with prior tax experience) Practice Lab usernames and passwords (suggestions available in Portal Libraries). We recommend using a single password, and generic usernames so that we do not need to assign new ones every year; these should be kept for the rest of training. A shared Google docs cross-reference spreadsheet allows TRCs, instructors, and LCs to match user and volunteer when checking homework and certification exercises.
- Send Portal invitations to all prospective volunteers. When a prospective volunteer becomes a candidate the system automatically ends an invitation only to those prospects where a conflict may arise. Consult with Member Services at 1-866-839-0463 for assistance)
- Download latest versions of any publications used in training and create desktop icons.
- Create a document with at-home use links.
- Provide a contact list of district personnel and their contact information.
- Assign mentors, if possible, so you are not the only person responding when a volunteer locks himself out of the system.
- Let Orientation attendees know in advance what the day's agenda is, also provide information on the protocol for asking questions (chat) and take Q&A sessions frequently to ensure knowledge transfer.
- Let each New Volunteer tell everyone who they are and their background and why they wish to join AARP Tax Aide.
- Ask prospective volunteers to have any training material already provided available during the Virtual orientation.
- Prepare Presenter screen with all presentations and documents to be presented already loaded and ready to share.
- Set up your background with any AARP Foundation Tax-Aide materials (flag, posters, etc.) which may show during your presentation.