Session Management Adoption Checklist

Overview: The Session Management Adoption Checklist is a guide to support the planning process and associated set-up tasks for utilizing the session management features within the Volunteer Portal. The Session Management Adoption Checklist focuses on planning, establishing, and monitoring volunteer events.

As Sites prepare to adopt the session management features within the Volunteer Portal, it is important to understand the process to enable session management features to meet the needs of Tax-Aide Sites. The figure below illustrates key actions for Local Coordinators (LCs), Shift Coordinators (SCOs), and Administration Specialists (ADSs) to take when enabling Volunteer Portal session management features for their sites and taxpayers.

December — **Verify Site Information and Volunteer Assignments**

Early January — **Review and Adjust Site Shifts**

Mid-January — **Manage Volunteer Availability**

Mid-January thru April — **Create Appointments**, **Reserve Appointments**

Roles and Responsibilities	
Local Coordinators and Shift Coordinators	Each site's LC and SCOs are responsible for ensuring site information is accurate in the system, creating and adjusting site shifts, managing volunteer availability, creating appointments, and supporting taxpayers in reserving appointments.
Administration Specialists	ADSs will play a support role for LC's and SCO's, communicating the purpose of session management features and assisting with general troubleshooting needs
Tax-Aide National Office Staff	Tax-Aide Staff are responsible for working directly with the Volunteer Portal Team to coordinate session management setup activities

Session Management Adoption Checklist (Cont.)

Preparation Task	Notes/Resources	Suggested Timeline	Person Assigned
Verify Site Information and Volunteer Assignments *Sites should ensure that information in the Program Location record (including location, program, status, and location availability) and volunteer assignments are accurately recorded. Information (including recurring shifts) will be published to Site Calendars on January 2, 2020.*			
Action: Create all active site volunteer assignments		December – January	ADS
Action: Review and update site Program Location record, including Location Availability	**Create and Manage Shift Schedule Guidebook** (slides 14-17) Opening and closing times indicated on Program Location records will be automatically created on Site Calendars on January 2.	December 31	Local Coordinator
Action: Verify Volunteer Assignments and communicate additional capacity needs to ADSs		December 31	Local Coordinator
Frequently Asked Questions	1. *Should a shift conclude at the end of the last appointment or start of the last appointment*? The end of the last appointment should coincide with the conclusion of the shift to ensure full volunteer coverage. 2. *How can we set up morning and afternoon shifts?* Enter morning shifts using **[Day of Week] Open Time and Closing Time** and use the [**Day of Week] Additional Time** fields to enter afternoon shifts. The system batch will create two shifts for that day based on the times outlined on the Program Location record.		
Review and Adjust Site Shifts *After January 2, Volunteer Leaders can view their site calendars and confirm that recurring shifts have auto-populated into the calendar based on information in their Program Location record (if applicable). In the weeks following, Volunteer Leaders should adjust modify/delete site shifts (or manually create site shifts) in accordance with their schedules through tax season.*			
Action: Review created shifts in Volunteer Portal	**Create and Manage Shift Schedule Guidebook** (slides 9-12)	January 10, 2021	Local Coordinator
Action: Adjust shifts for off schedule times and/or holidays	**Create and Manage Shift Schedule Guidebook** (slides 24-36)	January 10, 2021	Local Coordinator
Action (for sites without regular opening hours): Manually create individual or recurring shifts	**Create and Manage Shift Schedule Guidebook** (slides 13-22)	January 10, 2021	Local Coordinator
Planning: Begin communicating site opening hours with			Local Coordinator

volunteers to plan their availability			
Frequently Asked Questions	1. *How can we account for breaks in the day for counselors?* Local or Shift Coordinators can either omit the creation of an appointment block to account for a site-wide break OR omit assigning counselors to appointments during an individual break.		

Preparation Task	Notes/Resources	Suggested Timeline	Person Assigned
Manage Volunteer Availability *Once the Site Calendar is near final, ensure that your volunteers are indicating their availability via their Availability Calendars. Volunteer Leaders are able to create and modify Availability Calendars on a volunteer's behalf if they prefer.*			
Action: Collect Volunteer Availability	**Provide Volunteer Availability and View Shift Assignments Guidebook**	January 10, 2021	Local Coordinator
Action: Enter Volunteer Availability for Site Volunteers	**Provide Volunteer Availability and View Shift Assignments Guidebook**	January 10, 2021	Shift Coordinator or Local Coordinator
Action: Assign Volunteers to Shifts	**Manage Shift Assignments Guidebook** (slides 16-20) *Reminder*: Consider the number of volunteers available for a given period of time (i.e., an hour) when preparing to create appointment blocks. The number of counselors available should drive the number of taxpayers that can be served within an appointment block. For example, a site has four available counselors in one-hour increments that can manage four one-hour appointments.	January 10, 2021	Shift Coordinator or Local Coordinator
Planning: Determine the communication process your Site Volunteers will use if they need to cancel availability.		January 10, 2021	Local Coordinator
Frequently Asked Questions	1. *Can you assign a person with multiple functions to same shift (i.e., ERO and Counselor?* Yes, however you will have to choose a position for which they will be performing for each appointment block they will be assigned to. If the volunteer will be preparing taxes, he/she should be assigned to shift as a counselor. 2. *Can you assign Volunteers who have not completed their certifications to shifts?* According to Tax-Aide Policy and Procedure, only certified Volunteers should be assigned to shifts. However, because of the possible calendar overlaps between certification completion for some Volunteers and the tax season, you will be able to start providing Volunteer Availability for Volunteers who are in the process of completing their certification. The		

Session Management Adoption Checklist (Cont.)

	system will display certification information when a volunteer is assigned a shift.		
Create Appointments *After volunteers have been assigned to shifts, Volunteer Leaders will create Appointments to accommodate reservations and walk-ins. Only published appointments will show up on the Site Locator for Taxpayers to reserve online. Non-published (or draft) appointments can be used to collect information on Taxpayers who are walk-ins.*			
Action: Create and publish appointment blocks	**Manage Appointments and the Waitlist Guidebook** (slides 18-37)	January 10, 2021 (appointment sites)	Shift Coordinator or Local Coordinator
Action: Verify that published appointments are accurately appearing on the Site Locator	Appointment Scheduler pages for appointment sites will go live on January 15. This link is unique to each site and will be embedded within the Tax-Aide Site Locator.	January 16, 2021 (appointment sites)	Shift Coordinator or Local Coordinator
Action (optional): Assign Counselors to appointments	**Manage Appointments and the Waitlist Guidebook** (slides 53-58)	Ongoing, Mid-January – Mid-April	Shift Coordinator or Local Coordinator
Planning: Train appointment takers how to reserve appointments on behalf of taxpayers (including key information to be captured)	**Manage Appointments and the Waitlist Guidebook** (slides 38-43)		Local Coordinator
Planning: Train Volunteers how to enter contact information into draft appointments for walk-in Taxpayers	**Manage Appointments and the Waitlist Guidebook** (slides 38-43)	January 10, 2021 (walk-in sites)	Local Coordinator
Frequently Asked Questions	1. *How can I access the public-facing Appointment Scheduler page link?* Volunteers can access this link from the Tax-Aide Site Locator or from the **Scheduler Link** field on the Program Location record for the Site. 2. *How does the appointment blocks account for Quality Review?* If a site has dedicated Quality Reviewers, the individual appointments do not need to account for the time for quality review by the counselor. If the counselor must complete quality review, the time for quality review should be included in the appointment timeframe. 3. *Does a Counselor have to be assigned to a shift before you can create appointments for that shift?* A shift must be created before an appointment can be created but a counselor does not need to be assigned before appointments can be created.		

Preparation Task	Notes/Resources	Suggested Timeline	Person Assigned
Reserve Appointments and Manage Waitlists *Some sites will utilize Volunteers or partners to reserve appointments on behalf of Taxpayers. These appointment takers should be trained on how to reserve appointments as well as how to reschedule and cancel appointment reservations as needed.*			
Action: Reserve taxpayer appointments	**Manage Appointments and the Waitlist Guidebook** (slides 38-51)	Mid-January – Mid-April	Site volunteers
Action: Regularly view the Waitlist Report and prioritize Taxpayers on the Waitlist as needed	**Manage Appointments and the Waitlist Guidebook** (slides 59-65)	Mid-January – Mid-April	Shift Coordinator or Local Coordinator
Frequently Asked Questions	1. *How can an appointment taker that does not have access to the Volunteer Portal establish an appointment for a taxpayer?* The appointment taker will need to use the AARP.org Site Locator Appointment Scheduler page for appointments and adding taxpayers to the waitlist. 2. *How can an appointment taker that does not have access to the Volunteer Portal contact taxpayers on the waitlist?* The Local or Shift Coordinator should run a report, export and send the report to the appointment taker to contact the taxpayer. The appointment details will need to be entered in the Volunteer Portal by the Local or Shift Coordinator.		

Session Management Adoption Checklist (Cont.)

Key Reports

Report Name	Description	Tips & Tricks
SHIFTS: <Site Name>	This report provides a view of shift assignment by volunteer for a Tax-Aide Site. It includes dates of assigned shift and volunteer contact information.	• Use the *Date* filter to display shifts for any date range. • Print the report to share your site's shift schedule.
AVAIL: <Site Name>	This report provides a view of volunteer Availability by date for Volunteers that have an active assignment at a Tax-Aide Site.	• Use the *Date* filter to display volunteer availability for any date range. • Print the report to manually assign Volunteers to Shifts.
APPTS: <Site Name>	This report provides a view of appointments booked through the Scheduler by date for a Tax-Aide Site. It includes Taxpayers contact information and appointment details (time, assigned counselor if any, notes).	• Use the *Date* filter to display appointments for any date range. • Print the report to share appointments schedule and manually assign counselors to appointments. • Use the *Publish Status* filter to display all reserved appointments (including appointments reserved through the Volunteer Portal).
WAITLIST: <Site Name>	This report provides a view of waitlisted Taxpayers for a Tax-Aide Site. It includes Taxpayers contact information and is displayed in chronological order.	• Use the *Created Date* filter to display Taxpayers added to the waitlist for any date range. • Download the report in an excel format to add notes such as preferred date and time. • Print the report to share with appointment takers if they do not have access to the Volunteer Portal