

AZ – AARP Tax-Aide Calendar

SEPTEMBER

Prospects: Prospective Candidate Specialist:

Contact Prospects and On Hold Candidates in assigned Districts and updates their status in the Volunteer Portal.

Volunteers: Local Coordinators

Begin outreach to active volunteers to confirm their status. Send updates to Michelle Kaplan.

Training: TRS and Training Coordinators

NTTC Webinar – 9/18 – Self Study

Begin determining the proficiency exercises from the NTTC Workbook draft (matrix report).

Sites: District & Local Coordinators

Begin confirmation of Tax-Aide sites with the site host. Send all changes to Michelle Kaplan.

Other:

STAP Leader begins recruiting STAP Counselors.

SMT - Finalize State Leadership meeting details and send Save the Date announcements.

OCTOBER

Prospects: Prospective Candidate Specialist:

Contact Prospects and On Hold Candidates in assigned Districts and updates their status in the Volunteer Portal.

Candidates: District Coordinators

Contact Candidates-Under Consideration with orientation and training details.

Volunteers: Local Coordinators

Continue outreach to active volunteers to confirm status. Send updates to Michelle Kaplan.
Begin outreach to Leave of Absence (LOA) volunteers to confirm status. Send updates to Michelle Kaplan.

Training: TRS, Training Coordinators and Instructors

NTTC Webinar - 10/2 – New Workbook; 10/16 – NTTC Library Project; 10/30 - TBD

NTTC: Will commence shipping Workbooks to Active Counselors.

District Coordinators – Reminder to place NTTC Workbook orders for New Volunteers attending orientation or training.

Determine details of State Instructors Meeting.

Other:

Local Coordinators – Confirm site status with hosts, renew contracts.

State Coordinator – Send IRS Materials needs to District Coordinators – Review and Order

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NOVEMBER

Prospects: Prospective Candidate Specialist:

Contact Prospects and On Hold Candidates in assigned Districts and updates their status in the Volunteer Portal.

District Coordinator – Determine cutoff date for new volunteers and communicate to Cristine Kline

Candidates: District Coordinators

Contact Candidates-Under Consideration with orientation and training details.

Volunteers: Local Coordinators

Continue outreach to active and LOA volunteers to confirm their status. Send updates to Michelle Kaplan.

Training: TRS, Training Coordinators and Instructors

NTTC Webinar – 11/13 – TBD

Other:

November TBD – State Leadership Meeting.

TCS – James Graff - Publish final site listing for TaxSlayer software order for review/approval.

District Coordinators – Continue to send Tax-Aide site updates to Michelle Kaplan.

DECEMBER

Candidates: District & Local Coordinators

Conduct New Volunteer Orientation meetings.

Volunteers: Local Coordinators

Finalize active volunteer roster for your Tax-Aide site. Send all Retirement and LOA updates to Michelle Kaplan.

Provide required data for Form 15272 to DC and SC (SC sends to IRS)

Training: TRS, Training Coordinators and Instructors

NTTC Webinar – 12/4 – TaxSlayer enhancements

Counselor training begins in some Districts.

Other:

District Coordinators: Complete District Leadership meetings, distribute IRS materials.

Local Coordinators: Order site required materials from the portal.

Volunteers: Begin LMS training in the AARP Volunteer portal and Link & Learn exams.

State Coordinator: Conduct New Local and Shift Coordinator training (virtual)

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JANUARY

Candidates: District Coordinators

Make determination on new volunteers' status if close to training sessions.
Administration & District Coordinators – Input Volunteer Certifications into AARP Volunteer Portal.

Volunteers: Local Coordinators

Final cut-off for Leave of Absence (LOA) volunteers. Retire if on LOA for 2+ years.

Training: TRS, Training Coordinators and Instructors

NTTC Webinars: TBD
Conduct New Counselor & Returning Counselor tax training

Other:

Local Coordinators: Conduct Tax-Aide Site meetings with volunteers. Complete final host site visit to determine needs and to verify network connection. Set up and test equipment.

January 20th - Appointment calendar opens in AZ Tax-Aide website.