

# AZ – AARP Tax-Aide Calendar

## State Management Team

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## SEPTEMBER

### Partnership & Communications Specialist:

Update AZ website with location information received from District Coordinators.  
Remind AZ website content providers to review materials and send updates.  
Commence search for multiple appointment software support volunteers.

### Administrative Specialist:

Update site changes received from District and Local Coordinators.  
Create an Active Volunteers report for website access and send it to Cheryl (for Don).  
Create/Publish the AZ1 Roster and the AZ1 Active Volunteers report

**NOC Webinar** -

### Prospective Candidate Specialist:

Contact Prospects and On Hold Candidates in assigned Districts. Update Prospect/Candidate status in the Volunteer Portal.

### Technology Specialist:

### Training Specialist:

Begin by considering the venue, timing and agenda for the November Instructor meeting.

**NTTC Webinar – 9/3; 9/17**

### District & Local Coordinators:

Begin confirmation of Tax-Aide sites with the site host. Send changes to ADS.  
Coordinate outreach to active volunteers with PVS to confirm their status. Send updates to District AC.

### Other:

**STAP LEADER:** Commence recruiting STAP Counselors.

### Reporting:

AC: Create Prospects (Under Consideration) report for District Coordinator.

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## OCTOBER

### **Partnership & Communications Specialist:**

Verify links in AZ website to content sources are valid.  
Continue to update AZ website with materials received from content providers.  
Finalize appointment software vendor and support volunteers.  
Publish appointment Tip Sheets on AZ website.  
Prepare State Leadership meeting presentation.

### **Administrative Specialist:**

Update site changes received from District and Local Coordinators.  
Create/Publish the AZ1 Roster and AZ1 Active Volunteers report.

### **Prospective Candidate Specialist:**

Contact Prospects and On Hold Candidates in assigned Districts. Update Prospect/Candidate status in the Volunteer Portal.  
Prepare State Leadership meeting presentation.

### **Technology Specialist:**

Review the AZ website Technology section and send updates to Cheryl Haselhorst.  
Review and refresh materials in the AZ Technology shared drive.  
Prepare State Leadership meeting presentation.

**NTSC Webinar** –

### **Training Specialist:**

Update and publish the Instructor meeting details. (venue, dates, times and agenda)  
Begin reviewing Training resources in AZ website and update as necessary.  
NTTC will commence shipping NTTC Workbooks to Active volunteers.  
Prepare State Leadership meeting presentation.  
Finalize Virtual meeting plans for Training Coordinators and Instructors.

**NTTC Webinar – 10/1; 10/15**

### **District & Local Coordinators:**

**10/23: Leadership meeting – Wilmot Library 9am-5pm**  
**10/28: Leadership meeting – Pine Ridge Mall 8am-4pm**  
**10/30: Leadership meeting – Tempe Library 9am-4pm**

Continue confirmation of Tax-Aide sites with the site host. Send changes to ADS.  
Continue outreach to active volunteers to confirm their status. Send updates to District AC.  
Contact Candidates with details for Orientation and Training  
Place NTTC Workbook order (AARP Portal) for new volunteers.  
Review IRS Materials order (from SC) and respond with district needs.

### **Other:**

**STAP LEADER:** Continue recruiting STAP Counselors (assisters).

### **Reporting:**

AC: Create Prospects (Under Consideration) report for District Coordinator to contact.

# AZ – AARP Tax-Aide Calendar

## **NOVEMBER**

### **Partnership & Communications Specialist:**

Continue to validate content and links in AZ website.  
Continue to update AZ website with materials received from content providers.  
Download TaxSlayer screens for review and input to AZ Cactus Guide.

### **Administrative Specialist:**

Update site changes received from District and Local Coordinators.  
Create an Active Volunteers report for website access and send it to Cheryl (for Don).  
Create/Publish the AZ1 Roster and the AZ1 Active Volunteers report

### **Prospective Candidate Specialist:**

Contact Prospects and On Hold Candidates in assigned Districts. Update Prospect/Candidate status in the Volunteer Portal.

### **Technology Specialist:**

Continue to update the AZ website Technology section.  
Request confirmation of equipment inventory in each District.  
Create TaxSlayer software order for DC's review.

**NTSC Webinar -**

### **Training Specialist:**

Conduct Virtual Instructor meetings for Training Coordinators and Instructors with SC.  
Continue reviewing and updating Training resources on the AZ website.

**NTTC Webinar – 11/12**

### **District & Local Coordinators:**

Continue confirmation of Tax-Aide sites with the site host. Send changes to ADS.  
Continue outreach to active volunteers to confirm their status. Send updates to AC.  
Conduct District Orientation for new volunteers.

### **Other:**

**STAP LEADER:** Finalize tax season plans for STAP Assisters. Send details to Local Coordinators.

### **Reporting:**

AC: Create Prospects (Under Consideration) report for District Coordinator to update from Orientation meeting commitments.

# AZ – AARP Tax-Aide Calendar

## **DECEMBER**

### **Partnership & Communications Specialist:**

Finalize AZ website updates.  
Finalize AZ Cactus Guide.

### **Administrative Specialist:**

Update volunteer and site changes received from District and Local Coordinators.  
Create an Active Volunteers report for website access and send it to Cheryl (for Don).  
Create/Publish the AZ1 Roster and the AZ1 Active Volunteers report

### **Prospective Candidate Specialist:**

Move new Prospects to On Hold and notify the District Coordinator to determine availability.  
Send On Hold report to DCs to verify and request updates to be sent to District AC.

### **Technology Specialist:**

Finalize materials in the AZ website Technology section.  
Confirm TaxSlayer access to all Tax-Aide sites.  
Publish TSO Set-Up guidance to all software administrators.

NTSC Webinar -

### **Training Specialist:**

Finalize Training resources on the AZ website.  
Counselor training begins in some districts.

NTTC Webinar – 12/10

### **District & Local Coordinators:**

Notify SC, ADS, TCS of any Tax-Aide site changes.  
Finalize training plans for new and returning volunteers.  
Provide IRS Form 15272 data to SC and ADS. (SC will send matrix to IRS-SPEC)  
Finalize active volunteer roster for each Tax-Aide site.  
Send all retirements and LOA requests to ADS to process.  
District Coordinators conduct District meetings and distribute IRS materials.  
Local Coordinators order site required materials from AARP Order portal.

### **Other:**

**STAP LEADER:** Test Leader and Assister communication and reporting parameters.  
**Volunteers:** Begin LMS training in AARP Portal and commence IRS Link & Learn exams.  
**State Coordinator:** Conduct New Local and Shift Coordinator training (virtual)

### **Reporting:**

AC:

# AZ – AARP Tax-Aide Calendar

## JANUARY

### **Partnership & Communications Specialist:**

Open Appointment calendar on January 12<sup>th</sup>.

### **Administrative Specialist:**

Create Certification Report (weekly) and distribute it to District and Local Coordinators.  
Create an Active Volunteers report for website access and send it to Cheryl (for Don).  
Create/Publish the AZ1 Roster and the AZ1 Active Volunteers report

### **Prospective Candidate Specialist:**

Be available as a resource for District and Local Leaders regarding Prospect/Candidate cleanup including “On Hold” and “LOA”.

### **Technology Specialist:**

Be available as a resource for District and Local leaders regarding technology issues.

**NTSC Webinar** -

### **Training Specialist:**

Be available as a resource for New & Returning Counselor training.

**NTTC Webinar** –

### **District & Local Coordinators:**

Notify SC, ADS, TCS of any Tax-Aide site changes.  
Assist in training for new and returning volunteers.  
District Coordinators (or AC) input volunteer certifications into AARP Portal  
Local Coordinators conduct volunteer site meetings.  
Local Coordinators: Confirm network, Chromebook , Router & Printer set up at Tax-Aide site.

### **Other:**

**Volunteers:** Final cutoff for LOA volunteers – Auto-retire if on LOA for 2+ years.  
Complete all training and certification requirements.

### **Reporting:**

AC:

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## FEBRUARY to APRIL

### **Partnership & Communications Specialist:**

Resource duties.

### **Administrative Specialist:**

Resource duties.

### **Prospective Candidate Specialist:**

Resource duties.

### **Technology Specialist:**

Resource duties.

### **Training Specialist:**

Resource duties.

### **District & Local Coordinators:**

Notify SC, ADS, TCS of any Tax-Aide site or volunteer updates.

District Coordinators commence Tax-Aide site visits.

Local Coordinators – Tax-Aide site operations

Local Coordinators – Update site metrics after each month end.

### **Volunteers:**

Commence Tax-Aide site duties as instructed by site Leadership.

## POST SEASON

### **Partnership & Communications Specialist:**

Send End of Season survey.

### **District & Local Coordinators**

Verify equipment matches OIS reporting and is prepared for off-season storage.

Complete end of season metrics reporting in AARP portal

Inactivate all TSO users except LC, ERO, TRS, TCS and SC

Run TSO reports and verify all returns have been transmitted and accepted for all years.

Issue a Thank You letter to site host management.

Hold a post season appreciation event for all volunteers.

Approve volunteer reimbursement requests timely.

# AZ – AARP Tax-Aide Calendar

## State Coordinator

### July:

Send “Save the Date” information for Leadership meeting.  
Send “Save the Date” information for Instructor meeting.

### August:

Meet with IRS SPEC to review prior year and changes for new tax season.

### September:

Assist ADS with the Active Volunteers report for the webmaster.  
Assist TRS with choices for November Instructors meeting.  
Assist STAP Leader in recruiting counselors for STAP.

### October:

Send IRS Materials needs to District Coordinators – Review and Order  
Assist in testing links and updating material on the AZ website.  
Assist ADS with the AZ1 Volunteers report for publication.  
Assist TCS with material for Technology section of the AZ website.  
Assist TRS in finalizing choices for the November Instructor meetings.  
Conduct October Leadership meetings.

### November:

Assist TCS in creating the Site report for the TaxSlayer software order.  
Co-Conduct the Instructor meetings with TRS and Training Coordinators.

### December:

Assist ADS to add Candidates to the Active Volunteers report for the webmaster.  
Review LOA (volunteers) report for those on LOA for more than 3 years.  
Review On-Hold (candidates) report to verify if legitimate future candidates.  
Assist TRS in adding state members to each Tax-Aide site software and with TSO set-up.  
Submit Form 15272 worksheet to SPEC.  
Test STAP communications and assignment links.  
Conduct New District & Local Coordinator training.

### January:

Available as a resource as needed.

### February to April:

Schedule Tax-Aide site visits – minimum required is 50% of open sites. (32 to 35)

### Post Season:

Review and approve/refuse Pre-Approval reimbursement requests.  
Review and approve/refuse reimbursement requests.  
Review and publish post season site, equipment and software shutdown and storage instructions with help from SMT.