

IV09 - Chromebook Request Process

AARP Foundation Tax-Aide National Technology & Security Committee

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Summary

This document outlines the process for ordering Chromebooks to ensure all AARP TaxAide equipment is optimally used. This may be as simple as a transfer from one district to another within the same state or it may involve transferring Chromebooks to another region. The key to this whole process is an **accurate and up to date inventory in OIS**.

Identify Need and Local Inventory

The need for a Chromebook(s) can be identified by the district DC, LC or TC.

Once the need has been identified, the TC should search their local inventory for available Chromebook(s). If sufficient Chromebooks are available, the TC should arrange the transfer of the Chromebook(s) to the requestor and update OIS with the new Assigned To, Responsible For, and District information.

If shipping costs are involved, see the [Chromebook Shipping and Reimbursements section](#).

Search District and State Inventory 1st

Once a valid request is made, the local TC should first search their local inventory for “Available” Chromebooks. If the Chromebook order cannot be filled from excess district inventory, the TC should contact their TCS to determine if there are sufficient Chromebooks within the State to satisfy the request. If there are, the TCS should coordinate the transfer of the machines to the requestor and update OIS with the new Assigned To, Responsible For, and District information. If this is a limited number of Chromebooks, the TC/TCS should consider updating OIS themselves. Otherwise the OIS2 update can be done as a bulk by submitting a ticket and attaching spreadsheet [IV08 OIS 2.0 Form to Bulk Update -Assigned to -Responsible for -Usage Fields - Download](#) to this ticket. (Don’t forget to download the spreadsheet to your personal computer first before updating it.)

If shipping costs are involved, see the [Chromebook Shipping Reimbursements section](#).

Search Own Regional Inventory

If the Chromebook order cannot be filled from excess state inventory, the TCS should create a support ticket for the request and submit it with copies to the RTA. Download and fill out the [IV01 National Equipment Ordering Spreadsheet - Download](#) with the name, address and contact information of the requestor and attach this spreadsheet to the ticket.

The Ticket should be titled: “**Chromebook(s) Requested -**” Where the first part of the Ticket title is static followed by additional detail as needed for identification. For example: “**Chromebook(s) Requested for CA1-D16**”. The Ticket should also be copied to the:

- Original Requestor
- TC for any potentially affected Districts (if Known)
- RTA for the Region

The RTA will determine if there are sufficient Chromebooks within the Region to satisfy the request. If there are, the TCS/RTA should coordinate the transfer of the machines to the requestor and update OIS with the new Assigned To, Responsible For, Split-State and District information. Since this now involves a non-user editable field (Split-State) the RTA must submit a ticket with the new inventory details using: [IV08 OIS 2.0 Form to Bulk Update -Assigned to -Responsible for -Usage Fields - Download](#)

If shipping costs are involved, see the [Chromebook Shipping and Reimbursements section](#).

Search Other Regions Inventory

If the Chromebook order cannot be filled from excess regional inventory, the RTA should contact their counterparts to determine if there are sufficient Chromebooks within another Region(s) to satisfy the request.

The RTA can also query the latest file [OIS2 Inventory Usage Report](#) that is periodically populated with the entire National OIS Chromebook Availability. The link downloads the Excel Spreadsheet to your computer. This spreadsheet must be viewed using Excel, not in Google Sheets to work properly!

Note that this spreadsheet is a snapshot of the inventory, not a life document, so things may change a little from the time the spreadsheet was published. As-of dates are included at the top of each worksheet and at the bottom left of each printed report.

If there are Chromebooks available in another region, the RTAs should coordinate the transfer of the machines to the requestor and update OIS with the new Assigned To, Responsible For,

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Split-State and District information. Since this involves non-user editable fields (Region and Split-State) the RTA must submit a ticket with the new inventory details using: [IV08 OIS 2.0 Bulk Update Assigned to Form - Download](#).

If shipping costs are involved see the [Chromebook Shipping and Reimbursements section](#).

Request for Chromebook from National

Chromebooks should only be requested from the National store if all other options have been exhausted and no Chromebooks are available in another State or Region. Such a request can only be submitted by an RTA or TCS via a portal ticket with an explanation of why any other options aren't feasible and why they can't find any available Chromebook in another State or region. To make sure the involved people are aware of any changes, the RTA needs to copy the relevant TCS on all tickets and viceversa.

Chromebook Shipping and Reimbursements

Since the shipping is between TC's there is no central hub or boxes provided. The shipping TC may choose their preferred shipper (e.g., FedEx, UPS, USPS)

The shipping TC should make every attempt to box the requested Chromebooks for shipping. However, since this may not always be possible, the shipping TC may take the Chromebooks to their preferred shipping facility and have them box AND ship the Chromebooks to the required destination. Any shipping charges are expensed with expense code B (coordinating).

Revision History

Version #	Date	Initials	Comments
1	03/30/2025	NTSC	New document
2	7/23/2025	TN	updated request section
3	7/31/2025	JB	Updated links to force download on: IV01, IV08, OIS2 Inventory Usage Report documents