AARP Tax-Aide

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Administration Specialist's Guide

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Website for the public: **www.aarp.org/taxaide**
Website for volunteers (Extranet): **www.aarp.org/tavolunteers**

2 Million People Served Annually!

AARP FOUNDATION

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Dear Administration Specialists,

I am pleased to offer you this revised Administration Specialist Guide.

What's New

This guide has been refreshed to reflect the most recent information available to assist the Administration Specialists in performing their duties. Specifically, the updates center around the following items:

1. Standard process to develop system enhancements. This outline will provide a general understanding of how administrative program improvements will be identified and addressed going forward.
2. Activity Reporting updates that reflect lessons learned during the initial roll out of the WEB enabled system and the feed-back received from the volunteer survey conducted at the end of the tax season.
3. An introduction to the new WEB enabled system to permit Local Coordinators, District Coordinators, and State Coordinators to review site information in *VMIS* and update selected fields of that record in *VMIS*.
4. Electronic order form, with help features and links to view item(s), has been developed. This form can be filled out and emailed to the fulfillment department.
5. The new system requirement surrounding unique email addresses and what it means for the AARP Tax-Aide program volunteers.
6. The volunteer extranet at **www.aarp.org/tavolunteers** has been significantly redesigned. It is now much easier to use. From time to time information will be posted regarding current activities and deliverables. Volunteers are encouraged to use this tool to view program materials and publications.
7. The standard volunteer expense statement is typically updated each year. This year excel versions were produced for both leaders and non-leaders. These two versions are available on the volunteer extranet under "Forms".
8. Changes to the Program Order Form available for ordering are outlined for review.
9. New Accident Incident Form, available on the volunteer extranet, can help in collecting the necessary information needed if an accident occurs (see the section on Insurance).
10. The WEB site locator will use a new Google Maps functionality.

The ADS performs a vital role within the State Management Team (SMT). You all have a direct impact on how effectively we work to provide the infrastructure services that support the volunteers in their efforts to provide valuable and quality services to the taxpayers. Due to your efforts to accurately maintain the information in *VMIS*, we are able to have site information appear on the Site Locators, volunteers can order *TaxWise* software, receive reimbursement of their expenses, and activity reporting is collected and used to support a variety of program needs. Your role is vital to the ongoing health of the program and I commend you for all that you do!

As we collectively prepare for the upcoming tax season, we will work to continue to provide enhanced tools and services to support you in your efforts to support the program and the volunteers.

Have a wonderful tax season!

Jan K. Garcia
National Operations Manager
AARP Tax-Aide Program
AARP Foundation
Washington, DC

Introduction

This Administration Manual contains the information necessary for you to perform your Administration Specialist role as part of the AARP Foundation Tax-Aide Team. This manual is intended to be a companion piece to the AARP Tax-Aide Policy Manual. It, along with the Policy Manual, take priority in process and administration matters over all earlier guides and handbooks and will be amended, if necessary, during the tax year by letter or *Cybertax*. In the instance where there is an apparent conflict between the Administration and the Policy Manuals, in all instances the Policy Manual takes precedence.

State Management Team Role

The role of the State Management Team (SMT) is to serve as the AARP Tax-Aide leadership team for the state/split-state. The State Coordinator serves as the leader of the SMT volunteers holding the following positions: Administrative Specialist, Training Specialist, Technology Specialist and Partnership and Communications Specialist. The primary role of the SMT is to make certain that the program is run in an efficient manner in their state/split-state and to ensure that each of their specialty areas is in sync with the needs of the other parts of the program. Although each SMT member holds responsibility for an area of expertise, they can and should offer suggestions and think broadly about impact of decisions to the program as a whole. As a member of the SMT, the role of the ADS is to provide counsel and guidance to the State Coordinator (SC) and volunteer state management team on ideas and proposals to improve and manage the program at the region and/or state level that may have some administrative complexity. The ADS serves as the subject matter expert on a variety of infrastructure and administrative issues impacting volunteers in their state/split state. As such, in addition to the counsel and guidance they provide to volunteers in their SMT and training to volunteers in their state/split-state, they may be called upon from the National Office to provide feedback and suggestions on program enhancements intended to streamline processes and procedures for the benefit of all volunteers within the AARP Tax-Aide program.

Specific responsibilities for the ADS includes:

- Works with the Training Specialist, developing and/or conducting training for all Leaders and counselors on AARP Tax-Aide Program policies, procedures, and administrative aspects.
- Ensures that AARP Tax-Aide administrative reports are processed and completed within the guidelines of the program's annual calendar. Specifically is responsible for:
    - Training in Counselor activity reporting systems
    - Training in expense procedures and ordering of materials
    - Collection and distribution of site and volunteer information (Site Lists and Volunteer Rosters)
    - Support the role-out of the new Web enables site information system.

    - Maintains necessary records and files to support the requirements of the AARP Tax-Aide program, and performs other critical administrative duties.
- Serves as a member of the State Management Team.
- Maintains communications with the State Coordinator, the State Management Team, AARP Tax-Aide volunteers, AARP State Office staff, and IRS.
- Involves diverse populations in AARP Tax-Aide activities.
- Assists in expanding technological improvements in administrative procedures and coordinates efforts with the Technology Specialist.

Administrative Process Changes and Enhancements

The AARP Tax-Aide National Office has been aggressively reviewing current processes and procedures with the intent to identify areas to streamline, automate, and generally make workloads throughout the program easier for all. For projects involving major system and process redesign that directly impact volunteers, the National Office will follow a general process to ensure that sufficient volunteer input is solicited in identifying the current problem(s) as well as some requirements needed from the proposed solution. This process will typically result in a phased in implementation of a solution over a period of time and consist of the following general steps:

1. Issue Identification
2. Invitation for Volunteer Committee to aid and advise on the project as necessary/applicable. Volunteer Committee members will be kept appraised of the project status and will provide input and recommendations throughout the individual steps.
3. Detailed review of current process and identification of critical stumbling points
4. Development of proposed solution
5. System design, technological requirements identified and AARP funding secured
6. New system design tested
7. Development and implementation of communication strategy
8. System implementation
9. System administrator support during roll out process to volunteers
10. Post implementation volunteer survey and identification of phase 2 enhancements.

Volunteer Extranet

In March 2008, AARP Tax-Aide unveiled the fresh, new look of the AARP Tax-Aide Extranet (www.aarp.org/tavolunteers). The more organized, more user-friendly Extranet is the first phase of the updated Extranet project that is being done by the AARP Web Development group in conjunction with AARP Tax-Aide. The address of the Extranet remains unchanged from previous years and is www.aarp.org/tavolunteers . Find a variety of tools, resources, and links on the site including recruitment, promotion, and administrative materials, the site information and activity reporting, state tax-exempt certificates, and more. You can also keep tabs on "What's New" on the www.aarp.org/tavolunteers home page. The site is arranged by tabs and consists of the following structure:

1. **Home** - Consists of a "Hot Topics" section and a tab to go to the Frequently Asked Question section of the Extranet.
2. **Forms** – Contains AARP Tax-Aide forms for necessary administrative functions including ordering from Fulfillment, expense reimbursement, site or personnel changes, and more.
3. **Training** – Find up-to-date training resources for Process Based Training (PBT), Activity Reporting, ERO training slides, and other information for your use and modification.

4. **Technology** – A wide range of documentation and programs for the areas of technology such as networking, e-filing, and AVG anti-virus use is available in this area.
5. **Security and Confidentiality** – Find encryption instructions and additional information to help keep taxpayer data protected.
6. **Manuals Policy & Procedures** – All available Guides, Digests, and manuals, as well as any policy updates or major procedure updates can be found in this section.
7. **General Program Communication** – Find the latest news and information from AARP Tax-Aide National Office.
8. **Recruit & Promote** – Materials including ads and press releases are available for Partnership and Communication Coordinators and Specialists and all volunteers to keep the program growing
9. **Leadership Development** –Volunteer position are outlined for your use in recruitment, leadership development, or as needed.

Activity Reports

Each year volunteers are asked to collect and report on the number of taxpayers served. In the past, this process was manual and labor intensive for all involved. The National Office, with considerable assistance from volunteers across the country and all levels of leadership, developed an enhanced methodology to capture, analyze, and report on this data. The ADS has been, and will continue to be, a vital partner in the collecting, reviewing and reporting on the number of taxpayers served and returns developed. The process outlined here covers the newly designed process that was rolled out last year surrounding activity reporting. Of note regarding this activity reporting process are planned system enhancements and documented interdependencies.

What will remain the same for this upcoming year:

There were many things about the activity reporting system that were new last year and, overall, the implementation of such a robust and dynamic system was a successful one. The items that will continue basically as they were include:

- ✓ The Site Sign In Sheet. Some of the instruction on the back has been tightened up, but it looks and feels the same as it did last year.
- ✓ There will still be a total of 4 reporting periods (3 during the tax season, and one for the summer).
- ✓ The method to log onto the system will remain the same. The link will appear under the "Hot Topics" section of the volunteer extranet during the tax season.
- ✓ How the DC and LC enter the system (i.e. by using their volunteer ID number) will remain the same and the WEB screen pop-up buttons will not be changed.
- ✓ The ADS will still have access to run reports and edit data directly in *VMIS.*
- ✓ Unique SIDNs, which was implemented last year, will continue to be a requirement in *VMIS*.

Enhancements related to this upcoming year include:

- ✓ Less data will be visible on the WEB enabled screens that the DC and LC can access. Specifically the fields of data coming from the *TaxWise*/IRS system will no longer be ***visible*** from these particular screens. These data will, however, still be visible and editable from the *VMIS* application and will still be used in the reports that are available in *VMIS*. Removal of this information from the WEB enabled report submission screens was in direct response to suggestions received in the post implementation survey.
- ✓ A "print me" function will appear on the WEB enabled report submission screens that will permit the LC and/or DC to have a printed version of what they see on the screen.
- ✓ The 3 reporting periods during the tax season will end with the last calendar day of the month.
- ✓ A cumulative year-to-date total of prior months' reports for the specific volunteer self reported counts will be visible on the WEB enabled reporting system ***and*** will be included in the output using the "print me" function listed above.

- ✓ The "data-dump" report has been slightly modified to align the columns to the order shown on the Site Sign-In Sheets and the input form in the system.
- ✓ Additional report options will be available in *VMIS*. Several "flash" report options at the state/split state, DC, LC, and Site levels will be available in addition to the previously available report options.
- ✓ The district level option will be removed and ***all*** submissions will be at the site level. Reporting at the site level provides for maximum flexibility in using the counts submitted and provides for cleaner year-over-year comparisons. Reports will permit viewing the counts rolled up to the district level, but the counts will need to be submitted at the site level.
- ✓ Within *VMIS* the assignment of the LC and DC to the individual sites will require that those volunteers have the title of LC and DC respectively. Additionally, the LC and DC must be assigned to the same state/split state for which the site is assigned. In incidents where there are issues with coverage and an LC and/or DC from another state/split state needs to be assigned, the ADS should coordinate with the National Office on the appropriate procedure to address this circumstance.

<u>General Information about Activity Reporting:</u>

Reasons for collecting this information

The information on the number of people served is used for multiple purposes, including:

<u>Regional/State/District/Local/Site Levels:</u>
- ✓ Manage the program
- ✓ Monitor tax season production
- ✓ Identify and troubleshoot problems early.

<u>National level</u>
- ✓ Used to support multiple funding requests, including the AARP Foundation
- ✓ Required for IRS grant

The Reporting Periods

Although there may be additional reporting requirements within the state or regional volunteer management, there are only ***four reporting periods*** required at the national level (three cover the tax season, one is at the end of the summer). Coordinators at the district/local levels are involved in the monthly reporting periods, SMT and National are involved in the summer reporting period. These reporting periods are summarized below:

Monthly Reporting Periods	WEB (Internet) Submission Due Date	*VMIS* Review and adjustment by ADS
February March April	5 days after the last day in the reporting period, after which, data is loaded into *VMIS (national volunteer database that stores volunteer, site and activity information)*	15 days after the last day in the reporting period
Summer Report (8/31)	ADS enters directly into *VMIS*	September 5th

Why is there a Summer Reporting Period?

All services provided by volunteers are important and should be counted. Although the vast majority of services are provided during the tax season, some activity still takes place during the summer months (refer to the Policy Manual regarding Classification and Scope of Services for more details).

What Information is used and Where Does It Come From

Activity reports consist of information from volunteer self-reported information as well as information from other sources. These other sources consist of *TaxWise* data, survey data of taxpayers and volunteers, and other sources. Specifically, the information used in this reporting process consists of the following pieces of data:

Volunteer Self Reported (From Site Sign-in Sheets and includes both paper and e-filed returns)	Other Sources of Information (*TaxWise* and/or Survey Data/Other Sources)
1. Total Federal Returns (current year)	Data taken from *TaxWise*:
2. Total Federal Returns (prior year)	1. E-file returns
3. Total Federal Returns (Amended)	2. Federal Joint Returns, current year
4. Total State and Local ***ONLY*** Returns	3. State Returns filed (e-filed)
5. Total Questions & Answers ***Only***	
6. All Quality Reviews ***2nd*** Counselor's Initials (single total for both federal, state and local)	Data collected from Surveys & other Sources:
	7. Total number of disabled served (shut-ins)
	8. Total Volunteer Hours

Incremental vs. Cumulative Information

The information collected during the monthly reporting periods should be ***incremental***. In other words, the counts submitted for the month of March must not include the counts in the month of February, because the February counts were already submitted and we do not want to overstate the year to date counts. For example:

1. In February, 100 people came into a site – the incremental count reported is 100
2. In March, 50 people came into the same site – the incremental count reported is 50
3. In April, 10 people came into the same site – the incremental count reported is 10

The system adds the incremental amounts and report the total serviced. On this example, the reports show:
1. 100 if the report is run after the first reporting period
2. 150 if the report is run after the second reporting period
3. 160 if the report is run the after the third reporting period

The General Process

Prior to the beginning of each reporting period, the National Office pulls a listing of all **active** sites and the corresponding LCs and DCs from *VMIS* and populate the activity reporting system with this information. Once this is complete, the activity reporting system is turned on for the month. (Note: If a LC or DC was not listed with a site in *VMIS* at the date/time that the listing of sites was pulled, they will not be able to see their site for that reporting period. Additionally, if a site was not listed as "active" in *VMIS*, it will not show up in the activity reporting system for that reporting period.) Once the system is turned on for the month, the National Office will upload *TaxWise* data received from the IRS by SIDN on a weekly basis. At the end of the reporting period, the National Office initiates the close process which enables the DC to formally approve the counts being submitted. Once this period is completed, the National Office again pulls a listing from *VMIS* of all active sites and their respective LC and DC assignments to repopulate the activity reporting system for the next reporting period.

The information gathered in this process is initially collected at the site level using the individual site sign-in sheets. The level of detail input into the WEB enabled system is also at the site level. Once the individual site sign-in sheets are collected and the six pieces of information are tallied, the LC should input these six numbers into a specially designed WEB screen on the Internet. They will access this system within the "Hot Topics" section of the volunteer extranet throughout the tax season. The WEB screen asks for the volunteer ID number, and once given, illustrates the appropriate sites assigned to the LC or DC as was set up in *VMIS*. They can do this daily, weekly, or monthly. They will be able to see the cumulative totals posted from the volunteer self reported counts already in the system for the previously reported periods. If the LC does not have access to the internet, the DC can input it into the WEB site for them.

Once the information is entered into the WEB site, the DC can review each of the site summary statistics within their district, and can make adjustments as necessary to the volunteer self-reported information at the site level. A DC does not have to wait until the close process for the month to review the counts being submitted, however the approval button will only appear during this formal close period. During this close process, they will have a total of 5 days to review and/or insure that the information on the six volunteer self-reported pieces of information are correctly entered in the WEB screen. After this period of review is over, the information will be loaded into *VMIS*. Once there, the LC and/or DC will no longer be able to modify these counts and any need to do so must be coordinated with the ADS to ensure that the overall figures being reported are materially correct and complete.

The ADS, SC, and NLT members having access to *VMIS* will be able to run reports at any point throughout the season to see the counts that have been input to date.

Ordering Program Materials from AARP Fulfillment

Each year the National Office reviews the existing AARP program material developed for use by volunteers. Once updated, it is produced and stored in the AARP Fulfillment facility. Additionally and where possible, electronic copies of these materials are posted to the volunteer Extranet as appropriate (as listed on the cover of this manual).

New Electronic Order Form

In addition to the carbonless-copy paper version of the Unrestricted Items form, there is a new electronic version of the Unrestricted Program Material Order form on the volunteer extranet. This electronic form can be filled out on line and emailed directly to the fulfillment department. This form has a help feature available that can be an aid in completing the form. To access the help feature, put the curser in the quantity field and hit the “F1” key on your keypad to read examples of how to fill in the field. Additionally, there are links to PDF versions of the forms so that you can view the item to make sure that you are requesting what you thought. This electronic form will appear in the “Hot Topics” section beginning in September and remain until March.

AARP Tax-Aide Program Materials Order Form

Volunteers have access to order many of the materials directly from the AARP Fulfillment department. It is ***highly recommended*** that the use of the ***New AARP Tax-Aide order form*** be used to ensure that the correct item(s) are pulled to fulfill any orders. This form has been updated with all the unrestricted items available for volunteers to order from AARP, is available on the volunteer Extranet, and is also included in each shipment sent from the AARP Fulfillment department (a cherry envelope is also available for this purpose). Changes in the items which have been made available to volunteers this year include the following:

- Volunteer Shirts in XXXL sizes are now available
- Out of Scope Poster (lists the types of tax assistance services that are not taught and can not be provided by counselors nor leadership)
- Tell-a-Friend wallet cards (redesigned based on popular demand) are available in both English and Spanish
- Interview and Intake Sheets in Spanish will be available on the volunteer extranet
- The AARP Tax Record Envelope will have a taxpayer survey this year (English version of the envelope only)
- Generic Volunteer Award Certificate can be ordered directly from fulfillment.
- Electronic/Excel version of the expense form in two formats (one of leaders and one for non-leaders).
- Volunteer Reimbursement Direct Deposit Form is now listed.
- An Incident for is now available to aid in collecting all needed information – for insurance purposes – on any accidents.

If an AARP Tax-Aide item is not listed on the order form (or on the Volunteer/Site Recognition Request Form on the Extranet) then it has not been produced for use in this upcoming tax season and is not available.

Volunteers requesting materials from the IRS should use the standard methods and forms developed by the IRS and in use previously.

The quantities put into AARP Fulfillment are determined based on predicated ***normal usage***. Please order only what is needed, ***please do not over order*** and stockpile.

Administrative Packet

Each year an Administrative Packet is produced and distributed in the late summer/early fall. This packet contains ***sample materials*** that are available for ordering. Because the AARP Tax-Aide material requirements will be detailed in these packets, leaders ***should not place any orders with AARP Fulfillment until after receiving this Administrative Packet.***

Restricted Items

In an effort to control costs, in addition to the need for specialized handling of some requests, some items have been identified as “restricted”. These items are not included on the “AARP Tax-Aide Program Order Form”. Requests for restricted items should be submitted using the Volunteer and Site Recognition Request Form listed on the volunteer extranet and should be sent to their Sr. Field Support Technician at the National Office. The Sr. Field Support Technician will work with their ADS to review the request and fulfill the order. The items considered restricted include:

1. Years of Service pins (including 5, 10, 15, 20, 25, 30, and 35 year of service)
2. All plaques and certificates apart from the generic volunteer award certificate (form E0251)

Consumables

Beginning in the 2006 tax season, a national contract was negotiated to enable selected volunteers to order computer consumables that were delivered directly to the address they identified. This process minimizes the amount of out of pocket expenses incurred by volunteers, and can minimize the about of work and coordinating required of individual volunteers.

For specifics on this process, including a complete listing of those items covered under this national contract, please refer to the Technology Manual.

Other Activities

The ADS performs critical functions of an administrative nature within their state/split state. This includes a variety of topics including: reimbursements and insurance issues. Although their participation in these matters may vary at times, their knowledge of the processes, and who to go to for help when problems arise, is what is needed by other state and district leaders.

Volunteer Reimbursement

Due to the need for all volunteer leaders to be aware of policies and procedures surrounding volunteer expenses, the subject is spelled out within the Policy Manual for the AARP Tax-Aide program. The ADS plays a critical role with regard to expense statements in that they ensure that these policies and procedures are included in leader and counseling training and communications throughout the state/split state structure.

The new volunteer expense statement has been modified to make the title selection area easier to follow. In addition, an electronic version in excel of both the leadership reimbursement options as well as the Counselor/ERO/CF reimbursement form are now posted on the volunteer extranet. Volunteers using the excel version of the expense statement should realize that, upon receipt at the National Office, the form is still processed as if it was a paper statement.

One item of importance to stress regarding the processing of expense statements: ***expense statements that are completely filled out are processed more quickly than those that are missing information***. That is not to say that expense statements with incomplete information cannot be processed, just that it takes longer to complete the processing of them through the National Office.

Top Things that Cause a Delay in Processing an Expense Statement:

1. Header information missing or not clear
    a. Volunteer ID number, state/split state, position code
2. Volunteer is not listed in *VMIS* or they have no active assignments in *VMIS*. A volunteer ***must*** have an active assignment in *VMIS* to receive reimbursement.
3. Address listed is different from the address in *VMIS*. The √ helps with seasonal addresses, but does not help if the address listed is completely different from any listed in *VMIS*. Volunteers who have previously set up direct deposits with AARP are not impacted by a change of address for the duration that they maintain the direct deposit of reimbursements from AARP.
4. Mileage detail. Exact dates, number of miles, number of trips, and current rate used. Remember that the mileage rate is reviewed and re-evaluated each year and is subject to change. The correct mileage rate will be posted on the AARP Tax-Aide Volunteer extranet at www.aarp.org/tavolunteers

5. Wrong activity codes. Each and every activity for which a volunteer is requesting reimbursement ***must*** have an identified activity code (shown in the "Grouped Activity Codes" on the expense reimbursement form.
6. Requesting flat rate when itemized statement already submitted. Remember that a volunteer can only get one type of reimbursement for the year – either a single flat rate OR itemized reimbursement. They ***CANNOT*** get both.
7. Requesting itemized reimbursement when a CFR signed or flat rate statement was already submitted.
8. Requesting flat rate ***and*** itemized on same statement.
9. Missing signatures; supervisor ID number.
10. Using wrong titles/codes for assigned positions.
11. Extraordinary expenses requiring explanation, justification and/or approval by SC or TCS.
12. Lack of documentation or receipts that ***clearly*** support the amount being requested and that illustrates that the volunteer actually incurred the amount they are asking to be reimbursed for.

Insurance Issues

Although spelled out within the Policy Manual, there are two specific insurance issues which should be stressed for, and by, the ADS. These include:

1. Although it is the ideal that a volunteer be listed in *VMIS* when they first start working with the program, workloads and time constraints do not always permit this to happen as quickly as the ideal situation would indicate. In instances where an event happens and a volunteer is injured during their work with the program, they are covered even if they have not been set up in the *VMIS* system yet.

   In the instance where a volunteer has an injury, and the volunteer had not as of yet been listed in *VMIS*, some written documentation should be sent to the National Office indicating that the volunteer was working with the program at the time of the incident. This written communication, which can be email, should include their name, who they were working with (i.e. who their supervisor would be), and a statement that they were performing AARP Tax-Aide activities at the time the incident happened. This AARP Tax-Aide activity can include their first time traveling to their very first training to become certified in the program.

2. In the event that an incident happens involving either a volunteer or a taxpayer receiving services at a site, this should be reported up their chain of command as dictated by their volunteer structure. A form has been developed to aid volunteer leadership in collecting all the information needed to respond to the incident. This form is posted on the volunteer extranet under "Forms".

Training

The degree of ADS' participation in training leaders and counselors is dependent on how the state/split state functions. The ADS should coordinate with their SC and SMT regarding the extent and degree of participation. At a minimum, the ADS should provide refreshed information on expense processing, and remind their leadership on issues of insurance and reimbursable volunteer recognition activities. The ADS is a resource to understanding how to maneuver through the administrative aspects of their volunteer role in the program; and can be available to the Instructors during the fall training sessions. At the SC's discretion, the ADS can be his/her delegate and also be the state/split state lead on incorporating many of the other important AARP Tax-Aide policies and procedures, such as the site guidelines from the Policy Manual, into training.

To assist ADS volunteers in developing training content on policies and procedures and administrative issues, the training materials presented each summer to new ADS volunteers is made available on the volunteer extranet for use within their region and state/split state.

The Importance of Accurate Information in *VMIS*

To ensure the smooth operation of many functions within their state/split state, the ADS is responsible for assuring that the ***Volunteer Management Information System (VMIS),*** the national database containing volunteer, site information, and activity reports, is accurate, maintained, and current:

- This responsibility requires that the ADS have the skill and capability to log on remotely to the *VMIS* over the internet to update the data.
  - In the past, under limited instances, the ADS could have assumed this responsibility without such a capability with the approval of the Regional Coordinator and the National AARP Tax-Aide Office. This it no longer permitted.

The AARP Tax-Aide program is very large, complex, and in a constant state of change. To assist with keeping track of the information about the program (i.e. its volunteers and sites), a national database was created by AARP. Additionally, some of the information contained within this database is used to comply with grant requirements to supply the IRS with ***site*** information. The IRS in turn maintains their own national database, ***SPEC Taxpayer Assistance Reporting System (STARS)***, which contains information on volunteers and sites participating in the Volunteer Income Tax Assistance and Tax Counseling for the Elderly programs and other IRS volunteer programs, as well as which sites e-file, associated EFINS, and the equipment used to deliver these services.

Through a team effort with the National Office, the information that is maintained (either by adding or updating records) is vital to enable things such as:

1) Accurate listing of individual volunteers' addresses. This provides data for individual mail, e-mail, and telephone contact between leaders and volunteers as well as distribution of student training materials directly from IRS shipping locations. Delivery of volunteer expense payments, volunteer manuals, and printed labels are added benefits of maintaining permanent and/or seasonal addresses. Please note that AARP has recently chosen to enable on-line WEB recognition so that the WebPages can be customized to the individual. In order to do this, the technology used verifies email addresses. Because of this, the *VMIS* system now requires unique email addresses. This will impact some volunteers who share a single email address with their spouse or other individual for the purposes of communicating with AARP. See the section on unique email addresses for more specifics.
2) Accurate listing of AARP Tax-Aide sites on the AARP and IRS websites. This enables taxpayers to find sites near them, including site contact information, and where available, ***days and hours*** of operation. The AARP site locators are driven directly by the information entered into *VMIS* related to site locations, hours of operation, and other similar contact information. The IRS website is developed using data feeds from *VMIS* to the *IRS-STARS*. In addition, the listings impact the WEB enabled Activity Reporting process. See the section on Activity Reporting for more specifics.

3) Enabling volunteers to order software in a timely manner from the IRS. When a site is created in *VMIS*, it is assigned a unique SIDN. Each site in *VMIS* is marked ***yes/no*** as an e-file site, this information, along with the SIDN, is transferred to the IRS; who in turn load the data in the *IRS-STARS* system. The *STARS* system is referenced when volunteers order *TaxWise* software from the IRS-SPEC for use at a site. Sites, with their corresponding SIDN, must be marked as an e-file site within the *IRS-STARS* database in order to receive *TaxWise*.

4) Recording the start year of volunteers so that they can receive recognition upon completing pre-defined years of service milestones with the program. Note that the requirement of the start year is a legacy process with the old AARP volunteer database. Please refer to the section on Calculating Years of Service for more information. This field in *VMIS* can be overwritten if it is incorrect.

5) Ensuring that, once a volunteer successfully passes the mandatory annual ***IRS examination***, that this information is accurately recorded. In the case where a volunteer is ***not certified*** for the upcoming tax season, the District Coordinator must advise the ADS to change the returning volunteer's title to one of the positions not requiring certification (such as a Client Facilitator, Non-Counselor, or if appropriate, one of the applicable leadership positions); or to ***Inactive Status.***

6) Closing any and all assignments when a volunteer leaves the program.

VMIS Reports to Evaluate the Program

There are several standard *VMIS* and Non-*VMIS* reports that are used to aid in the management of the program throughout the country. The reports listed here are distributed to the Regional Coordinators (RC) and can be distributed to the SC and ADS. Individual regional volunteer management may use additional reports, but at a minimum the following reports are used at the national level:

<u>Activity Report (*VMIS* Report)</u>
This reporting requirement, at a minimum, summarizes information at the state/split state and region levels. It illustrates the number of taxpayers served, the nature of the service they get from the program, the total number of operating sites (and the related averages per site), as well as a key Year-over-Year comparisons. This report is driven by the individual statistics collected at the sites throughout the country. This report is used for IRS compliance reporting, to justify funding requests for the program to the AARP Foundation, and to manage the program nationally. This report is provided to the National Leadership Team (NLT), SCs, ADSs, and is published in the annual *Happenings Newsletter*. Additional flash reports are also driven off of the data stored in *VMIS*, and are available at the site, LC, DC, State and Regional levels.

<u>Personnel Report (*VMIS* Report)</u>
This report is run out of ***VMIS*** and is only as accurate as what has been entered into ***VMIS***. It takes the information within the volunteer rosters and aggregates it at the state\split state and regional levels by highest position held. Additionally it illustrates some span of control statistics on volunteers and provides key year-over-year changes in total number of volunteers and people served. This report is used for IRS compliance reporting, to justify funding requests for the program to the AARP Foundation, and to manage the program nationally. This report is provided to the NLT, SCs, and ADSs.

<u>Volunteer Expense Report (Non-*VMIS* Report)</u>
This report shows volunteer generated expenses for the program, including direct volunteer reimbursements as well as volunteer initiated hotel, meeting, consumables, and approved storage costs for the grant year (October through September). All costs are illustrated using the accrual method of accounting. Examples of the type of expenses shown here include any expense in which:

- a volunteer received reimbursement,
- a volunteer had air travel and accessed the National Travel Vendor used by AARP (Travizon) rather than purchasing it on their own and requesting reimbursement, or
- hotel and catering costs that were incurred for a volunteer meeting,
- consumables ordered through the national contract
- storage costs, if and when approved.

It is the ***goal*** of the National Office to produce and distribute interim quarterly financial reports, with a final, more extensive report distributed at the end of the grant cycle in the fall to the NLT, SCs, and ADSs. Interim reporting illustrates by state/split state and region, spending by activity and position level. The year end report illustrates by state/split state and region, spending by activity and position, in addition to cost averages (compared to volunteer, service, and site levels) and key Year-over-Year comparisons.

Reference Reports and Reports to assist in updating information in *VMIS*

As previously identified, maintaining current information in *VMIS* is a primary responsibility for an ADS. The ADS can access the system directly to review the information and update it as necessary. Then, once they have completed updating the information (on either volunteers or sites), they can distribute this updated information to their ***split state/state*** leadership. This updated information can be distributed using the standardized reports that are available within *VMIS*, or the ***ADS can*** produce an ad hoc report out of *VMIS*. For those volunteer leaders (such as the SCs and NLT) who either do not have access to *VMIS*, or who do not wish to run *VMIS* reports themselves, the National Office can also print and distribute rosters to them upon request.

These standardized reports include:

<u>Initial Update of Site Lists SIDN & E-Filing</u>

This report is available, for those ADS volunteers who wish to use it, to assist in the review of basic site information in *VMIS* from the previous year. Using this report, the ADS volunteer can coordinate with local management (LC/DC or others) to update information about the site, the scheduled dates/times of service, contact information, etc. For the ADS who does not use this standard report, they should work directly within *VMIS* to review and update site listings.

<u>Site lists</u>

A site listing report is a reference tool available to volunteer management. It shows information such as: who is the LC, DC, and contact; location, e-file status, scheduled dates, and times of operation, etc.

<u>Leadership Roster</u>

This report is available for use as both a reference tool and a vehicle to coordinate updating of leadership information within *VMIS*.

<u>All-Volunteer Roster</u>

Similar to the Leadership roster (above) this report is a reference tool, and ***can be used to*** coordinate the updating of volunteer information including level of certification and assignment information. The first time the roster is generated, it shows volunteers from the previous tax filing season. Using this report, the ADS volunteer coordinates with local management (LC/DC or others) to update the information.

Other *VMIS* Generated Printouts

There are two additional printouts from *VMIS* of importance. Each of these serves a different, and unrelated, function:

Volunteer Labels
Mailing labels with volunteer ID, current assignment, and mailing address are available for volunteer leadership. These labels are primarily available for use on expense statements and can minimize delays in processing of expense reimbursement requests. Additionally, the labels can be used on hard copy material ordering forms if the materials being requested are to be sent to the volunteer's home address. Any volunteer leader can order these mailing labels by sending an email, or placing a call, to the Sr. Field Support Technician in the National Office.

The Counselor Flat-Rate Reimbursement Form can only be produced by the National Office. This restriction is in support of audit requirements. This report is produced by the National Office in late February/Early March after efforts to update *VMIS* with current year Counselor Certifications and other volunteer status adjustments should have been completed. Its primary purpose is to enable Counselors, Electronic Return Originators (ERO), Client Facilitators (CF), Non-Counselors, and Shift Coordinators to opt in for a flat rate reimbursement for the tax season. This report is only as accurate as the *VMIS* database when executed. Volunteers who are not accurately reflected in the Counselor Flat-Rate Forms, who wish to receive reimbursement, will be required to submit an AARP Tax-Aide Expense Statement (form E234).

Updating Volunteer Information in *VMIS*

This section discusses policy and program related implications to updating volunteer information in *VMIS*. Technical questions and issues are addressed within the *VMIS* training reference manual that all volunteers receive who have been authorized modify access to *VMIS* (which pertains to ADS volunteers only).

Maintaining current information on AARP Tax-Aide volunteers is important not only to the individual volunteers, but for the program itself. Some of the critical reasons for accurate volunteer information include enabling:

1) Both that the volunteer leadership, as well as the National Office, can reach an individual volunteer, if necessary.
2) The timely processing of volunteers' expense reimbursement requests.
3) Recording volunteers' required annual counselor certification in the program.
4) Email distribution lists based on positions held.
5) Permitting required program reporting on the number and composition of the volunteers within the program to assist with management decisions by volunteers at the state\split state and regional levels.
6) Future on-line self help capabilities to volunteers.

The timing of when this information should be updated is somewhat staggered throughout the year (refer to the Appendix I for specifics on this timing). Specifically, data should to be updated according to the following schedule:

1) New volunteers to the AARP Tax-Aide program can be entered at any time into the *VMIS* database, ***however appointments to counselor positions can only take place after the volunteers successfully complete and pass the annual certification examination.*** In other words, a counselor ***must not be appointed or re-appointed in VMIS*** by the ADS until he/she has been ***officially certified***. (New volunteers to the AARP Tax-Aide program may already exist in *VMIS* due to their participation in other volunteer programs or otherwise were identified in *VMIS* as a perspective volunteer for an AARP volunteer program.) Please realize that a new volunteer will not appear on a roster unless they have at least one ***active*** assignment.
2) When creating a new volunteer in VMIS, please first look to see if a record for them already exists. They could have volunteered for another AARP program, or had volunteered for the AARP Tax-Aide program in past years, be an AARP Member, or otherwise communicated with AARP in the past. If they had been set up previously in the AARP database, that volunteer's existing record ***must*** be used to avoid future problems with reimbursement, updating their assignments and their contact information, as well as WEB enabled systems.

3) Assignment of leadership positions are typically done in predefined cycles in time for the annual grant cycle. (Please refer to the Policy Manual for specifics on these cycles which are typically June or August.) Exceptions to these predefined cycles can and are made as needed with management consideration and coordination.
4) A systematic review of all volunteer records (including assignments and supervisory relationships) should be done each year in association with the "All Volunteer Roster" and "Leadership Roster" update process. Refer to Appendix I for the timing of this process.
5) Volunteers must be listed in *VMIS* in order to receive ***any*** type of reimbursement. Reimbursements are typically processed after the tax season is ended, however leaders may receive itemized, non-counseling, reimbursement throughout the year.
6) Coverage of volunteer travel accident insurance ***does not*** require that the volunteer be entered into *VMIS* at the time of the accident. A volunteer is covered from the time they travel to attend their ***first*** training or meeting with the AARP Tax-Aide. In the case of an incident, if the volunteer is not in *VMIS*, an email confirmation from the SC is sufficient supporting documentation of participation in the AARP Tax-Aide program.
7) Volunteer terminations, for whatever reason, should be made as soon as the information becomes available.

In instances where critical updates are needed to *VMIS* outside of the standard period or due date, they should be coordinated with that volunteer's state management.

Some of the most common activities for updating *VMIS* for volunteer information are listed below. Please refer to the *VMIS* training reference manual for more specific technical instructions.

Creating a New Volunteer in *VMIS*

When a new volunteer comes into the program, a record should be created for them. This record includes standard contact information, assignments, etc.

At the time that the ADS attempts to create the volunteer's record, *VMIS* looks into other AARP contact databases to see if this person already exists. The volunteer could already exist in another system because they have worked with another AARP program, are currently (or have been) an AARP member, or have had other contact with AARP. The purpose of the effort to look into other AARP databases is to ensure that we have consistent contact information for the same people, regardless of which database they are in. If a person already exists in one of these databases, their contact information ***should*** be pulled into *VMIS*. The most common database used for this purpose (from the perspective of the AARP Tax-Aide program) is the official AARP contact database called ***KONNEX***. The computer systems compare common information (first and last name with zip code, or city and state) to do the comparison. If there is more than one potential match using this common information, the multiple matches will be displayed to enable the ADS to select one of them. The potential matches look at both current address information as well as old addresses and can provide comparisons against old contact information as well. If they do exist within *KONNEX*, their standard contact information can be pulled into *VMIS*. If this person does not exist within *KONNEX*, you will have to enter in their complete information into *VMIS* (in so doing, a new record for this person is created in KONNEX).

The information that you either accept from one of these other databases, or enter into *VMIS* in its entirety, is also fed into our accounting database to enable future reimbursements.

Special Note regarding Start Year: For new volunteers, the start year should be automatically populated based on the date of the first assignment. This field was originally intended to aid in calculating years of service with the AARP Tax-Aide program. This information can be calculated using active assignments. A new report option was created that shows, for individual volunteers, both the start year and calculates the number of years of service based on the actual assignments in the system. The calculated number of years of service is dependent on the date that the report is run.

Updating an Existing Volunteer in *VMIS*

For address and other contact information

Accurate and current contact information (including address and email) is critical to ensure that volunteers receive reimbursement and updates in a timely basis. In any given year, the program issues approximately 25,000 reimbursement payments and struggles with how to most effectively communicate critical program information out to its volunteers. Problems in these areas impact the overall experience with the program for the volunteers.

Because there is an effort to maintain consistent contact information on the same people in the various databases used by AARP, if contact information is updated in one system, this revised information is transferred to the other systems. As a result, if an ADS changes or otherwise updates contact information, that change will appear in the other databases. If a change is made within the other source databases, conversely, the contact information is updated in *VMIS*.

Unique E-Mail Addresses

As part of AARP's overall efforts to increase its use of the internet, AARP is beginning to set the stage to enable more interactive internet communication and on-line functionality between AARP staff, members, and volunteers. One of the first steps in this process is to establish computer and system security protocols to enable AARP members and volunteers to get behind the AARP computer network's firewall. They plan to use an internet industry standard of email addresses, as listed in KONNEX and VMIS, to accomplish this.

What are some potential benefits to the AARP Tax-Aide program?

Ultimately, this functionality will, once it is completely implemented, open the possibility of designing new functionality to permit volunteers to:

- order supplies,
- participate in administrative WEB training,
- submit expense reimbursements on-line, as well as
- other potential on-line functionality as of yet not identified.

But this capability will require some preliminary set up of information in VMIS.

What is the impact to the AARP Tax-Aide program?

Email addresses within VMIS must now be unique for all volunteers. The net effect is this: NO VOLUNTEERS WILL BE ABLE TO SHARE AN EMAIL ADDRESS IN VMIS! In reviewing this business requirement, we discovered this should impact less than 3% of all AARP Tax-Aide volunteers. If a husband and wife currently have the same email address listed in *VMIS*, only one of them can have this email address attached to their volunteer record. The spouse will need to have a different email address listed in their volunteer record in *VMIS* (or, although not preferred, they could have no email address listed at all).

What does this mean to the ADS who is trying to update volunteer records?

Each time that an ADS volunteer tries to add a new volunteer record or update a existing volunteer's record ***for any reason***, and that volunteer record has an email address, *VMIS* will check with KONNEX to verify that the email address listed is not already linked to another individual record. If it is already listed as belonging to another individual record in KONNEX, the ADS ***may*** get an error message back.

Recognizing that these email addresses may be utilized for other than AARP Tax-Aide information and contact purposes, we would recommend that this relatively small number of volunteers acquire new email addresses for AARP Tax-Aide program use. There are a multitude of free options that appear to be relatively easy to do and volunteers could choose an option that they were most comfortable with. The options available to these volunteers include getting a new email address with a free email provider or adding another account to the email provider the volunteer is already using. Today many internet service providers offer family accounts, which enable subscribers to have multiple email addresses under the same plan and for the same charge as having a single account. If a volunteer already has an email with one of the major providers, they may provide additional email addresses at no cost. Some examples of what large providers offer include:

- **Comcast** (allows up to 7 email accounts with service)
- **Verizon** (allows up to 9 email accounts with service)
- **Earthlink** (allows up to 8 email accounts with service)
- **Time Warner** (allows at least 3 email accounts with service)
- **Google Mail** -also known as **Gmail** (comes with lots of storage space, filters out spam into a separate folder, has an option to report a message as spam)
- **Windows Live** - formerly call **Hotmail** (color codes spam messages for easy detection, has folders to organize messages)
- **Yahoo! Mail** (automatically check for new messages every 10 minutes, has folders to organize messages, allows the user to switch back to the "classic" version if they do not want to use the newer one)

Of course the selection of which email provider and solution to select is entirely a volunteer's decision. Until the impacted volunteers' decide on a course of action for a second email address, and to ensure that the volunteer records are updated and current the ADS ***could*** remove the second email address ***temporarily*** until such time that the impacted volunteer can select an alternate email address.

If an ADS volunteer is experiencing difficulty in updating a volunteer's record due to this unique email business rule, they can also seek assistance from the Sr. Field Support Technician in the National Office that is assigned to their Region.

For certification

Volunteers are required to be certified annually, and this certification is valid until September of each year. This certification requires them to successfully take and pass the IRS test. This certification has two significant and critical components:

1) The Counselor must pass the IRS test. (Note: Instructors and EROs need to be certified as well)
2) All Counselors must agree to the Standards of Conduct and note that agreement by signing the statement.

We take these statements ***very seriously*** and expect that you will as well. We realize, however, that there are significant workload issues placed on the volunteer leadership for this program. Because of this workload concern, it is the practice of the AARP Tax-Aide program that a volunteer's assignment is not closed out at the end of each certification period. Instead, the assignment is continued in *VMIS*, and it is closed out, if and when, the volunteer does not successfully receive recertification in the next season.

For supervisory assignment

It is important that all volunteers be assigned a supervisor within *VMIS* to ensure that:

1) Communications, including those from the National Office, work effectively, and
2) Any requests for reimbursement can be processed in a timely manner.

As a result, if a supervisor resigns or otherwise leaves the state management within the AARP Tax-Aide program, there needs to be a replacement supervisor assigned to all those individual volunteers who reported to the exiting supervisor. The volunteer identified to replace the supervisor who is leaving must hold a volunteer position that is equal to, or higher than, the position held by the exiting volunteer. In other words, if a District Coordinator (DC) is leaving, the replacement volunteer needs to hold the position of DC or higher. They can not hold, as their ***highest leadership position***, the assignment of Local Coordinator (LC) within *VMIS*. If a volunteer is selected to replace the exiting volunteer that has, as their highest position, the title of Local Coordinator (LC), then that volunteer should be assigned the position of District Coordinator (DC) ***before*** they are assigned in *VMIS* as the new supervisor.

When a Volunteer Leaves the Program

Sometimes a volunteer needs to withdraw from the program for a period of time. In these instances, the volunteer's record should show that they have ***no current (or open) assignments***. In other words, all their assignments must be closed.

There are two separate pieces associated with a volunteer in *VMIS*. The first piece is the volunteer record. The second are the assignments attached to the volunteer record. In the past, if a volunteer left the program for a period of three years or more, their record (i.e. the first piece associated with the volunteer) was inactivated in *VMIS*. In this instance, the volunteer's record was "readable" but could not be updated (i.e. have any additional assignments added.) Today, a volunteer's record is ***not*** made "inactive" even if they have not worked with the AARP Tax-Aide program for an extended period of time. If a volunteer is shown with no active/open assignment for an extended period, and this individual is able and willing to return to the program, they can receive a new assignment; and ***they should not receive a new volunteer ID number***. In these instances, the ADS should search for the volunteer's old record in *VMIS* and update their assignments. If the ADS has difficulty finding the returning volunteer's original records, they should contact their Sr. Field Support Technician at the National Office for assistance.

Because of the reliance on the active assignments in *VMIS* to calculate the years of service, it is ***very important*** that assignments (i.e. the second piece associated with a volunteer record in *VMIS*) are closed within the system when someone leaves the program, as well as new assignments assigned/open when they return to the program. See the section on Calculating Years of Service for more information.

When a Death Notice is received

In a similar manner to the changes that can take place for contact information (i.e. address changes being entered from multiple departments within AARP), so too can we be notified of a volunteer's death through multiple AARP departments.

When a Death Notice is received for a volunteer within one of the other departments within AARP, the record for that volunteer will be locked in *VMIS*. In this instance, the assignments are still current/open and need to be closed. In order to close any current/open assignments, and thereby ensure that the volunteer does not appear on any current rosters, the death notice needs to be temporarily removed from the volunteer's record in *VMIS* so that the assignments can be closed out. Once the assignments are closed, then the death notice should be re-entered for that former volunteer.

In instances where the AARP Tax-Aide program is the first department to receive a death notice, the volunteer's assignments should be closed out prior to entry of the death notice. Once the death notice is entered into the volunteer's record, the other AARP systems will be updated as well.

When a Volunteer Returns to the Program

If a volunteer returns to the program after an extended leave, ***and their record had been inactivated in VMIS***, a new record will need to be set up in *VMIS*. This new record will have a new Volunteer ID number. All future activities for this volunteer, including recognition of year of service, expense reimbursements, certifications and assignments, must reference this new ID number. In this instance, when the new record is created in *VMIS*, the ADS should not use the defaulted start year, but should instead change the start year for the volunteer to reflect the first year of their service in the program. This will aid in "flagging" the volunteer in the "Start Year Validation Report" when determining the years of service for the purposes of recognition.

In instances where a returning ***volunteer's record was not inactivated in VMIS***, the only action needed is to create the current assignment(s) and validate the supervisor.

See the section in this manual on "Calculating Years of Service" for more details.

Group edit function

Some group edit functions within *VMIS* were developed to help with data entry. For volunteer data within *VMIS*, these group edit functions include:

1) Supervisor assignment is changed for all volunteers reporting to a supervisor. This can be done when ***100% of the volunteers reporting to a supervisor are moved to another supervisor***. The mass edit function should not be used if the volunteers reporting to a supervisor are moved to multiple supervisors. The sequence of this type of mass edit is strictly defined. Prior to removing the old supervisor's assignment, the new supervisor – holding the appropriate level position – must be identified and assigned the title in *VMIS*.
2) Movement of ***all*** volunteers with a single non-leadership assignment from one title and into another title for all volunteer records within a single state\split state.
3) Movement of ***all*** volunteers within a single split state into another. This is used when two state\split states are rolled into a single split state.
4) Assignment of SC and ADS to each site to facilitate internet access by both the SC and ADS to the new WEB enabled site information updating process. In this process, both the SC and ADS must hold the respective position within the personnel table and be assigned to that state/split state within *VMIS*.

Updating Site information in *VMIS*

Importance of Accurate Site Information

Maintaining current information on AARP Tax-Aide sites is important not only to the general public, but impacts *IRS-STARS* and individual volunteers' ability to perform the functions of their position if they are a leader. Some of the critical reasons for accurate site information include the following:

1) Each week throughout the year, files are electronically fed from *VMIS* to the IRS. The IRS (at the National level), in turn, updates *STARS* with this new information. (Note that each IRS regional office must update its own copy of *STARS* with the information that is transferred to the IRS otherwise the regional IRS staff will ***not*** see the changes.)
2) Volunteers (typically those assigned as TCS) order the software needed to run their sites from the IRS. These orders are typically placed with the regional IRS beginning in September. The IRS will not ship the software orders unless its regional *STARS* records are updated with the appropriate e-filing status of the site the volunteer is ordering on behalf of. Although the SC or their delegate notifies the IRS-SPEC at the respective territory office with a list of the EFIN's for which e-file software is to be ordered, unless the data ties with the site information in *STARS*, the software order will not be fulfilled by the IRS. As a result, it is important that *VMIS* maintains current information on sites and e-file status to facilitate software ordering.
3) Site information is posted by the IRS (at the National level) on the IRS website as a site locator function for use by the general public. The IRS takes its information from its *STARS* application. Please note: only sites listed as being open to the general public AND that have a ***standardized address*** can appear on the website.
4) Site information is posted by AARP on the AARP website as a site locator function for use by the general public during the tax season. This website is directly linked to *VMIS*, so as soon as the information is updated and saved in *VMIS* it will become available on the AARP Website. Please note: only sites listed as being open to the general public AND that have a ***standardized address*** will appear on the website. This function is only available during the regular tax season.
5) Site information is updated by AARP on the AARP toll free phone number during the tax season. This function is only available during the regular tax season. Only sites that are open to the general public AND that have a ***standardized address*** will be referenced on the phone site locator. This information is updated nightly during tax season.
6) Current LC and DC assignment for each site will enable enhanced reporting, communication and enable a point of contact within the AARP Tax-Aide program if there is an issue or question at a site that needs to be resolved.

7) To enable internet submissions of activity reports (i.e. internet\WEB submission) the LC and DC fields are now ***required*** in *VMIS* for all sites. In addition, to enable alignment of data from sources such as *TaxWise*, the format of the site SIDN has been ***standardized*** in *VMIS* and it is also, now, a ***required*** field in the system.

A site can be Active, Inactive, or Removed. These classifications represent specific things within the program:

1) A site is ***active*** when it is used to provide tax assistance services during the current tax season. This is the default setting for all site records when they are created.
2) A site is ***inactive*** when the AARP Tax-Aide program is no longer maintaining a relationship with that site for future tax seasons.
3) A site is ***removed*** from the *VMIS* system only when the record was created for the site in error. In these instances, the volunteer ADS must contact the National Office to get the site removed as they do not have the security access to remove a site from the database.

Standardized addresses

As we all become more dependent on automation, the manner in which the location of our AARP Tax-Aide sites are listed in *VMIS* impacts how related systems work. Specifically, in order to have a site appear on the IRS website or the AARP Site locators (either phone or website locator) the site must have a complete and standardized address.

The Postal Service defines a complete and standardized address as one that has all the address elements necessary to allow an ***exact*** match with the current Postal Service. The street address is fully spelled out, except where official abbreviations are used (such as for state). Although it is currently not required by the USPS, many systems either have difficulty incorporating non-standard addresses or do not accept non-standard addresses at all within their respective systems. (For more information about standardized addresses, including standardized abbreviations, please go the US Postal service website at http://pe.usps.gov/text/pub28/welcome.htm) Please note: *VMIS* ***does not require*** the use of standard addresses, but will check the address entered to the standardized format.

In cases where the address entered is not in the standardized format, a notice will appear on the screen to the ADS. Entering non-standard addresses into *VMIS* impacts the AARP Tax-Aide program in the following ways:

Examples where it is more difficult include:
1) Issuing Site Insurance certificates
2) Mailing of program materials

Examples where it does not work with other systems include:
1) Publication on ***any*** website, including the AARP WEB or AARP toll free number of sites (i.e. sites without standard addresses do not appear in these site locator features).

WEB enabled system to update VMIS site information

A new optional feature, scheduled to be available in the fall 2008, will allow AARP Tax-Aide volunteer leaders with local awareness of site activities to modify site location data directly without the necessity to make a request to another volunteer, primarily an ADS. This new and exciting feature will enable an LC and/or DC to view individual records for the active sites assigned to them and, ***in selected fields***, update the information directly themselves! The feature also allows an easy means of requesting a Certificate of Insurance as may be requested by a site host.

Once this optional means of updating site records becomes operational the LC/DC will be able to provide accurate information for public distribution more quickly than ever before. *VMIS* will be updated as soon as the LC/DC enter SAVE. The WEB Site Locator will reflect the changes immediately; the phone site locator will reflect the changes the next business day.

Together with a core team of ADS volunteers, we are designing this new WEB enabled functionality. It will be available via the volunteer extranet with a log on process similar to that used for Activity Reporting. We currently plan to have this new capability available in October 2008. It will be visible as a link under the "Hot Topics" section of the volunteer extranet through the end of the tax season. This new tool will be ***optional***, and volunteers can try out this new capability or they can use their existing methods to update site data. Initially the volunteers who will have access to this capability will include: SCs, DCs, LCs and ADSs. (The ADS will retain full editing capability through direct access to VMIS), the site updating process will function similarly to the Activity Reporting system where volunteers enter their volunteer ID number to access the system. Once in the system, the volunteer will see a listing of all the ***active*** sites to which they are assigned (note that the SC and ADS will see ***all active*** sites for the state/split state to which they are assigned). After selecting an individual site, the detailed information for that site will be visible in a series of individual "tabs". All fields related to the site currently in *VMIS* will be on the WEB enabled screens, however only some of the fields will be ***editable in*** this WEB enabled system. ADS volunteers will still be able to log directly into *VMIS* and make any and all changes, just as they have in the past.

Some of the features available with this new WEB enabled system includes:

1. Multiple help buttons, illustrated on the screen by a small question mark (?), will assist users as they learn how to use the system.

2. There will be a "Print Me" button that will permit the user to have a printer friendly version of the site information that they see on the screen. The "print me" button will print all tabs that make up the data modification screens. (Note: the Site Roster reporting function currently available in *VMIS* will still be available once this new WEB enabled system is functioning).
3. The LC/DC/SC/ADS will not be able to inactivate an existing site, nor will they be able to create a new site, ***using this WEB enabled system***. For these types of changes, the ADS will still need to update the site records directly in *VMIS*.

4. The SC/DC/LC/ADS will be able to request receipt of a site Insurance Certificate, and this online request will be routed directly to the AARP Risk Management Department for processing.

Creating a New Site in *VMIS*

As spelled out in the Policy Manual, each AARP Tax-Aide site has a nine digit SIDN which is issued following an IRS SPEC numbering system. The 6-9th digits are assigned by the volunteers within the AARP Tax-Aide program.

The 6th digit indicates the split state designation. If there is no split state, the default for this digit should be "1".

Digits 7th-9th are assigned by the State Coordinator (SC) and ADS (and/or Regional Coordinators in some cases). This team of volunteers develops and implements a structure to the assignment of these digits that suites the needs for the management in that region. It is recommended that the structure of the assignment permit sufficient flexibility to minimize the need to renumber sites yet promotes enhanced reporting (i.e. define the district or other reporting requirements). At a minimum, these digits should include a designation of a "state" when more than one "state" is within an IRS Territory.

Once the site is activated in *VMIS* and assigned an LC/DC, the site will be accessible using the new WEB enabled Site Information System.

Updating an Existing Site in *VMIS*

Each year site information should be reviewed and updated. In the late summer, the National Office initiates a mass edit to all sites to ensure that the sites are updated with a default start and close date of February 1st and April 15th. This process date stamps all site records which then enables all records to be resent to the *IRS-STARS*. Once the mass edit is complete in *VMIS*, volunteers can modify site records for more specific information as necessary.

A confirmation of the site's continuation with the AARP Tax-Aide program should be made. During that process, standard information should be reviewed and the ADS notified to update *VMIS* accordingly for the following items:

1) Address is complete and accurate. Note that the use of standard postal addresses is needed if a site should be listed in the web or phone site locators.
2) Contact information should be refreshed, especially if the site is open to the public. Please note that contact information for sites open to the public will be posted on site locators.
3) Hours, as well as days/dates of operation should be reviewed and updated – especially if the site is open to the public. It is not required to be 100% accurate with the start and end dates for the site, but it is recommended that the days and hours of operation be updated, especially if the site is open to the public and/or opens before the standard date of February 1st.
4) Any changes in LC or DC for a site should be confirmed/updated.
5) Appointments and references to a site being open to the public should be updated as necessary.
6) E-filing status is ***critical*** as this impacts the ability to receive *TaxWise* software in a timely manner from the IRS.

Information about a site can be updated throughout the tax season as well. Any and all updates will be sent to the *IRS-STARS* system, publicized fields will be posted on the Site Locator features available to the public, and will be shown in the new WEB enabled system referenced in the section titled "New WEB enabled system to update site information" referenced earlier.

What to do if a Site is relocating/or the address needs to change

In some instances, a site may physically move locations. If this happens, within *VMIS* you should make the site inactive and create a new site. ***Each SIDN is unique and can not be recycled***. The VMIS has been changed to require a standardized structure to the SIDN and to require a unique number for each site. This was implemented to support the activity reporting system and will remain in effect going forward. Please note that the transfer of an EFIN required notification to the IRS. For more explicit directions on this, refer to the IRS form 8633 and contact your local IRS SPEC office to determine the procedure used for completion of this form. In addition to the form, instructions are posted on the IRS web site.

What to do when a Site is Closed Down

It is recommended in the Policy Manual that, once a site has been secured by an LC, Coordinators should attempt to keep it on a continuing basis for each tax season. This is not possible or even desired in every case. In the instance where a site is no longer active, either because the facility providing the space can not longer accommodate the AARP Tax-Aide program, or the volunteer management in that area chooses to close a site, then the site should be ***inactivated*** within *VMIS*. Please note that a site should never be deleted in *VMIS* (and ADS do not have the ability to do so within *VMIS*).

Updating an Existing Site in *VMIS* for LC and DC assignment

It is important to have any and all active sites assigned to an LC ***and*** a DC volunteer. VMIS has been modified to ***require*** an LC/DC be assigned to each active site. Additionally, these assignments ***require*** that the volunteers hold the title of LC/DC prior to the assignment of the site(s) AND the LC/DC assigned ***must*** be listed to the state/split state for that site(s). These VMIS business rules have been set up to enable the new WEB enabled systems for Activity Reporting and Site Information Management. Any ADS needing additional guidance on these new business rules in *VMIS* should coordinate with their Sr. Field Support Technician at the National Office.

Mass edit functions

The National Office is able to perform some mass edit functions that help with data entry. For the site data within *VMIS*, these mass-edit functions include:

- Changing the default open and close dates for the upcoming tax season. This sets up the opening date of February 1st and the closing date of April 15th. This is typically done in August in association with the Site Updating Kick-Off announcement.
- Movement of all active sites within a split state to another split state. This is useful when two split states are rolled into one split state.

State\Split State Assignments

In an effort to enhance reporting, as well as to ultimately streamline input into the *VMIS* system, a split state table was developed in *VMIS* that is linked to the 5 digit zip code. This table, which also has county identifiers, is updated automatically within *VMIS* on a regular (quarterly) basis using standard US Postal updates.

This split state table has the following capabilities:

1) For volunteer records, it will identify the ***initial*** split state assumption based on the volunteer's 5-digit zip code. This information can be over written, however, as volunteers can live in one area yet volunteer in another area.
2) For site records, it will identify the split state assignment based on the 5-digit zip code and will populate the county, city, and state fields automatically in the instance where a standardized address is used. In instances where a non-standardized address is used, these fields will still need to be entered into the site's records.

This new functionality was developed using an initial listing of all 5-digit zip codes from the US Post Office. These zip codes were compared with the currently active sites to align split state assignments. For the zip codes that did not have any currently active sites, the zip code has been initially assigned to the closest split state in that area.

This split state table is maintained by the National Office. If an error is found in the assignment of a zip code to a split state, the Sr. Field Support Technicians can make the adjustment in the split state table to correct the situation. Additionally, if a new split state is developed, the Sr. Field Support Technician will coordinate with the ADS to ensure that the new split state boundaries are identified and they, the Sr. Field Support Technician, will adjust the split state table in *VMIS* accordingly.

This new functionality is, or is anticipated to enable, the following:
1) Activity Reporting within *VMIS* that summarizes split states and rolls them up into predefined regions.
2) Automatic assignment of potential volunteers (recruits) to their potential split state and automatic email their information to the appropriate PVC for review.
3) Streamlining data entry of volunteers by pre-populating split state assignment and standardized address where available (volunteers would only need to key in street address and zip code).
4) Streamlining data entry of sites by pre-populating split state and other field assignments. In other words, if a standard address is used, the fields of: Split-State, State, City, and County will no longer require the ADS to ***manually*** input them into the Site screen because these fields will be automatically defaulted with the corresponding information from the split state table. Of these fields, the ADS can override the default values of the Split-State, State and City; but not the County Field.
5) Enabling the alignment of various demographic information along split state lines for use by the National Office and volunteer leadership.

Site Locators

The AARP Tax-Aide program currently uses two different types of Site Locators: phone and internet\WEB. The formal Site Locators are active from January through April of each year. Outside of this period, when someone accesses our site locator systems, they will get a message that states that the site locators have been turned off and not available until the next tax season. The features of both are summarized below:

Toll Free Phone Site Locator	AARP Internet\WEB Site Locator
1) Complete information is ***updated nightly*** during the tax season that the feature is turned on.	1) The site ***links directly*** to *VMIS*, so updates are immediately available as soon as they are saved in *VMIS*. The feature is deactivated outside of the tax season.
2) Can only accept/refer to sites with complete ***standard addresses***.	2) Can only accept/refer to sites with complete ***standard addresses***.
3) Will only show sites that are open to the ***public***.	3) Will only show sites that are open to the ***public***.
4) Does ***not*** provide exact hours of operation, but advises people to call the site before traveling.	4) Provides ***exact*** days and hours of operation as noted in *VMIS*
5) Provides listing within five mile increments, but in ***random order***.	5) Provides listing within user defined mile increments (when using the ***advanced search*** features). ***Sorts*** sites in order of miles.
6) Calculates miles based on the ***center of the zip code*** the caller identifies.	6) Uses standard ***Google Maps*** capability to show site locations.
7) Calculates the number of miles based on a ***direct line*** (i.e. not by car, but by air)	7) Calculates the number of miles based on standard ***Google Maps*** capability.
8) Is dependent on how current the zip code tables are in the system. Current practice of updating is manual and *ad hoc*.	8) Is dependent on how current the zip code tables are in the system. Current practice of updating includes a quarterly update of the system.

When *VMIS* is Down

Communications from the National Office

VMIS is scheduled to be available between the hours of 8am-11pm ET, seven days per week, including holidays. If the *VMIS* system will be unavailable during those hours for any planned maintenance, at lease one-week advanced email notice will be provided. Every effort will be taken to perform system maintenance outside of the scheduled hours of availability. The one-week notice does not apply in situations where emergency fixes must be applied or unexpected outages occur. Routine periodic maintenance (both hardware and software) is required to ensure the continued reliability of the servers supporting *VMIS*. This periodic maintenance is performed once every 60 days (example: on Sunday, beginning the second Sunday in January of each year between the hours of 3pm and 11pm ET). During this time, *VMIS* and the WEB enabled systems linked to it, will not be available.

The National Office makes every attempt to communicate with volunteers that have access to *VMIS* about system outages related to *VMIS*. Currently these efforts include:

1) Mass email distribution directly from our Technology Department of planned outages in advance of the disruption to service to all individuals identified as users of *VMIS* (users being defined as anyone who can run a report or perform data entry in *VMIS*). This includes both the planned, week in advance notice, as well as the emergency notices.
2) Due to various spam filters that may be in volunteers' email systems, the AARP Tax-Aide National Office Staff sends out additional email reminders of such planned and un-planned disruption of services, and attempts to post a statement on the yahoo ADS chat group at http://finance.groups.yahoo.com/group/AARP-TAXAIDE-ADS. (Note: this internet\WEB chat group is administered by AARP Tax-Aide ADS volunteers and is intended to be an area to enable ADS volunteers to communicate with each other.)

Reporting Problems with *VMIS*

Despite our best efforts to ensure that *VMIS* is available and that you receive the tools you need to use the system, from time to time you will encounter problems that you can not resolve on your own.

Over the past two years, the National Office has received many helpdesk calls. The nature of these calls include problems with accessing the system, questions regarding how to enter information and/or run reports, as well as discovered technical problems with *VMIS* that were not discovered previously.

In a few instances, the errors you encounter are the result of security issues that you, by design, can not resolve. In other instances, the errors you encountered can be the result of a flaw in the system that you have just discovered or an instance where you need some personalized assistance with a particular issue.

It is important that you report any and all problems using *VMIS* to the AARP Helpdesk (1-888-925-2002) or email your problem to helpdesk@aarp.org. This ensures that we are able to track and resolve your problems more effectively. Additionally, reporting them to the helpdesk will enable us to review patterns in the problems encountered to align communication and/or training efforts, as well as to request enhancements to the system to facilitate your usage of the screens and reporting capabilities. See section on *VMIS* enhancements for more details.

Scheduled and unscheduled enhancements to *VMIS*

VMIS is a database that is constantly evolving. The structural (or system) changes being made to *VMIS* are intended to:

1) fix system glitches
2) update various companion data elements
3) enhance data entry and system access screens
4) enhance reporting and 2-way communication

Timing of when enhancements are implemented is dependent of the criticality of the enhancement, its complexity, and the available AARP resources to assign to work on the enhancement. Enhancements are developed (i.e. coded) in a copy of *VMIS* referred to as the test environment. In order to implement any enhancements developed in the test environment so that volunteers and staff can use the enhancement, the *VMIS* system would have to be taken down. When it is down, it is not available to volunteers or staff.

In instances where an enhancement is actually a fix to a broken part of *VMIS*, and that fix is time sensitive and critical to the operation of a particular program, then the *VMIS* system may be taken down unexpectedly to move a fix into production.

In instances where an enhancement can wait until a planned periodic maintenance every effort will be made to roll out a simple enhancement in the next planned maintenance cycle. These planned maintenance cycles happen every 60 days.

In instances where the enhancement is complex, the enhancement may take longer to develop, test, and implement in *VMIS*. In these incidents, a multi-phased in approach to the enhancement will be used. See the section on “Administrative Process Changes and Enhancements” for more specifics on this general process.

Calculating Years of Service in the Program for the Purposes of Recognition

The original intent of the start year field was to assist with calculating the years of service in the program to enable a formal recognition of a volunteer's years of service. To understand the reason behind this field, the need for which at first may seem questionable, some background on the use of a national database for the program needs to be understood.

The current national database, *VMIS*, is a custom AARP application and was developed over several years and implemented in 2001. Prior to this period, the information on volunteers and sites was maintained within an older and less robust system. When the information from the old system was transferred to *VMIS*, in some instances the start year was not transferred over accurately.

Within *VMIS* we have the capability to calculate years of services using active assignments as the reference point. This calculation is dependent on how complete the assignments are for each volunteer. As a backup, the start year is available. A report option has been developed that shows both the "start year" for a volunteer, and calculates the number of years of service based on the active/open assignment dates as of the time the report is run in *VMIS*. This report option is based on the volunteer ID number. If a volunteer record was "inactivated" and they received a new ID number, this report will not accurately calculate the number of years of service. This inaccuracy should be viewed as a leading indicator that there are some inconsistencies in the records for a particular volunteer in *VMIS*. In these instances, two separate reports can be run (one for the inactivated Volunteer ID number and a second for the active Volunteer ID number) to determine the total active years of service. See "When a Volunteer Leaves" for more details.

To review years of service, a report was developed: Start Year Validation Report. The ADS should use this report to begin discussions with their management team about recognition. Once it is decided that volunteers need recognition items, the request should be submitted using the Volunteer and Site Recognition Request Form listed on the volunteer extranet. This form should be sent to the Sr. Field Support Technician for the region requesting the items at the National Office. The Sr. Field Support Technician will work with their ADS to review the request and fulfill the order as necessary.

Appendix I: Schedule of activities and deliverables for the ADS

There are specific periods where activity takes place and the information within *VMIS* needs to be refreshed and/or modified. Although an ADS, with access to *VMIS*, may update information at any time throughout the year, the updating should be completed by the periods listed below in order to avoid negatively impacting other aspects of the program. ADS having difficulties with any of these tasks in *VMIS* should work with their Sr. Field Support Technician to resolve the issues within the timelines listed below:

Month	What Needs to be Done	When it should be completed and what this impacts
January	Information on the status of volunteer certification should be updated in *VMIS*. This information should be sent to the ADS. Specifically who notifies the ADS within a split state/state is dependent on how that split state/state operates (ideally this would be the instructor as they grade the tests, but it could also be the DC). Regardless of who actually notifies the ADS, that notification should be provided to the ADS as soon as it becomes available. This is referred to as "Updating the All Volunteer Roster". As needed and requested, assists the Training Specialist in training counselors on policies, procedures, and administrative aspects of the program (including WEB enabled Activity Reporting).	This information needs to be updated in *VMIS* prior to the issuance of the Counselor Flat Rate Forms in the end of February.
	Information on site SIDN, as well as LC/DC assignments to a site, should be updated prior to the population of the new Activity Reporting WEB site (this population is done before the end of the month).	These pieces of information in *VMIS* are critical to ensure that information is aligned and LC/DCs can access their sites on the WEB to submit the first month's activity reports.

Month	What Needs to be Done	When it should be completed and what this impacts
February	The process of updating the All Volunteer Roster in *VMIS* may continue (if not completed earlier). Each SC, along with their SMT, must work out procedures to ensure that a list of certified counselors reaches the IRS.	This information needs to be updated in *VMIS* prior to the issuance of the Counselor Flat Rate Forms in the end of February. If this is not completed prior to the issuance of the Counselor Flat Rate Forms, it will be more difficult to pay volunteers timely. The IRS needs to receive certification notification by the third business day of February each year. This is an IRS grant requirement.
March	The tax season generally begins February 1st, although some sites open a bit earlier. Although the minimal reporting requirements in the WEB enabled system that feeds *VMIS* include submission for the period ending with the last day in February (2/28), the SMT may require additional supplemental reporting prior to this date. The ADS should run one of the standard *VMIS* Activity FLASH reports to distribute to volunteers in their state/split state. At a minimum, it is recommended that a FLASH report be distributed on a monthly basis.	The agreement between the AARP Tax-Aide program and the IRS stipulates that the amount of assistance by the program's volunteers ***must*** be reported in a timely manner. These statistics are used by state level management to assist in overseeing the activities within their region and state\split state. Submission of site level statistics are due via the internet\WEB submission process no later than five days after the close of the reporting period (by the LC/DC), at which point the data is loaded into *VMIS*. The ADS should review and update (as necessary) the submitted counts within 15 days after the close of the reporting period to make sure it is materially correct and complete.

Month	What Needs to be Done	When it should be completed and what this impacts
April	Expense reimbursements are processed at the National Office. Expense forms should be submitted to begin the reimbursement process. This includes both itemized expense forms and CFRs. The reimbursement process includes: a comparison by the National Office of the volunteers' addresses, a review of the volunteers position(s), as well as validating that expenses are permissible within program policies and procedures. At times, there may be an address or position discrepancy between the information on an individual reimbursement request, and that within *VMIS*. In these instances, assistance from the ADS may be sought to help clear up any outstanding issues as necessary. Only ***after*** the outstanding questions are resolved can the expense statement be processed.	Expenses for counseling should be submitted once the tax season is completed in a specific area. Volunteers can submit their single reimbursement request for "I" expenses prior to the end of the tax season, however due to grant requirements, the tax assistance expenses are not reimbursed until the end of the tax season. If volunteers do submit their reimbursement requests early, they will be held by the National Office until after the tax season and then processed in compliance with grant requirements. The majority of expenses are paid shortly after the close of the tax season. Volunteers should make every effort to submit their expense statements by the end of May. Leaders can submit non-counseling expenses throughout the year.
	The second formal reporting on the number of taxpayers served for the period ending with the last day in March (3/31) due in the WEB enabled system that feeds *VMIS*. Final confirmation of these figures is needed 15 days after the last Saturday of the month. The ADS should run one of the standard *VMIS* Activity FLASH reports to distribute to volunteers in their state/split state. At a minimum, it is recommended that a FLASH report be distributed on a monthly basis.	Activity Reporting for the second period should follow the same general process as with the first reporting period. Totals of the two reporting periods, up through the last day in March, are subtotaled and submitted to the IRS in compliance with the grant.

Month	What Needs to be Done	When it should be completed and what this impacts
May	Assistance with outstanding expense statements may continue depending on overall volumes. If necessary, the ADS may be requested to verify some information on a particular volunteer and update *VMIS* as necessary. The third formal reporting on the number of taxpayers served for the period ending with the last day in April (4/30) is due in the WEB enabled system that feeds *VMIS*. Final confirmation of these figures is needed 15 days after the last day of the month. The ADS should run one of the standard *VMIS* Activity FLASH reports to distribute to volunteers in their state/split state. At a minimum, it is recommended that a FLASH report be distributed on a monthly basis. Performance reviews by all leadership is required.	Activity Reporting for the third period should follow the same general process as with the first two reporting periods. This report should include the vast majority of annual statistics for the program. The data submitted, to date, is compiled to obtain a total on the number of taxpayers served. This information is used during the NLT annual May meeting, in the next quarterly IRS report in compliance with grant requirements, and as preliminary numbers to support AARP funding requests.
June	No specific deliverables are typically required by ADS volunteers.	N/A
July	No specific deliverables are typically required by ADS volunteers.	N/A

Month	What Needs to be Done	When it should be completed and what this impacts
August	The process to formally begin updating of Leadership and Site listings in *VMIS* begins. This is kicked-off by the National Office to ADS. Included in this distribution are instructions and due dates for updating the information. Leadership Rosters are verified and updated for new appointments, as well as addresses and contact information. In addition, during this effort, it is recommended that the appointment dates for current terms be verified and corrected as necessary. The process to update Sites within *VMIS* should begin. Special attention should be placed on the accuracy of E-filing status, SIDN, and LC/DC assignments.	Leadership information needs to be completed by early September in order to permit the mailing of specialty guides and the Administrative/Instructor Packets to leadership. This packet contains samples of the materials that were developed throughout the summer for use in the Fall and upcoming tax season. Site data is fed to the IRS bi-weekly throughout the year. This information needs to be current within the *IRS STARS* system to enable ordering of software (starts in September). Additionally, site dates and hours of operation are posted for the public on both the IRS and AARP websites beginning in January. Finally, site information (including SIDN and LC/DC assignments) are fed into the Activity Reporting Internet\WEB screen to facilitate Activity Reporting. This feed is scheduled for late January.

Month	What Needs to be Done	When it should be completed and what this impacts
September	The process of updating Leadership and Site information in *VMIS* may continue (if not completed earlier). All expense statements are due to the National Office for the grant cycle ending in September. The final formal reporting on summer activities as of 8/31 on the number of taxpayers served is due in *VMIS*.	 Any outstanding expenses should be submitted for payment by September 30th. The final activity report should be submitted through *VMIS* by September 5th . This information is combined with the previously submitted totals to get a final count on the number of taxpayers served for the grant cycle. It must include the annual statistics on the number of people served in order to remain in compliance with grant requirements. This is also the final opportunity to correct any counts reported in previous periods throughout the year.
October & November	Leadership and Site updates continue. Assists the SC and Training Specialist as needed in developing counselor training surrounding policy, procedures, and administrative aspects of AARP Tax-Aide (including WEB enabled Activity Reporting).	

Month	What Needs to be Done	When it should be completed and what this impacts
December	The process of updating information in *VMIS* on the status of volunteer certification of volunteers should begin. This process is kicked-off by the distribution of the All Volunteer Roster by the National Office to the ADS and the State Coordinator and training activities taking place. For sites that produce paper returns, SIDN labels may be produced for use by volunteers to ensure that the AARP Tax-Aide identifier is correctly listed on any paper returns.	This information needs to be updated in *VMIS* prior to the issuance of the Counselor Flat Rate Forms in the end of February. In the event that a paper return is produced outside of *TaxWise*, volunteers need to mark the bottom of the return with the AARP SIDN identifier. Printed labels can help facilitate this.

Appendix II: Position Description

Program: The AARP Tax-Aide program provides free personal income tax assistance and tax form preparation to low- and middle-income taxpayers, with special attention to those age 60 and older.

Purpose of Position: The Administration Specialist (ADS) works with the State Management Team to implement and maintain administrative procedures.

Responsibilities of Position: Guided by the policies and procedures of the AARP Foundation and AARP Tax-Aide and the direction and support of the State Coordinator, the ADS:

- Works with the Training Specialist, developing and/or conducting training for all Leaders and counselors on AARP Tax-Aide Program policies, procedures, and administrative aspects.
- Ensures that AARP Tax-Aide administrative reports are processed and completed within the guidelines of the program's annual calendar. Specifically is responsible for:
    - Training in Counselor activity reporting systems
    - Training in expense procedures and ordering of materials
    - Collection and distribution of site and volunteer information (Site Lists and Volunteer Rosters)
- Maintains necessary records and files to support the requirements of the AARP Tax-Aide program, and performs other critical administrative duties.
- Serves as a member of the State Management Team.
- Maintains communications with the State Coordinator, the State Management Team, AARP Tax-Aide volunteers, AARP State Office staff, and IRS.
- Involves diverse populations in AARP Tax-Aide activities.
- Assists in expanding technological improvements in administrative procedures and coordinates efforts with the Technology Specialist.

Qualifications: The ADS must have the ability to implement and maintain AARP Tax-Aide programmatic needs in a state to include e-mail capability. It is ***required*** that the ADS be computer literate and have access to the Internet.

Term of Service: The ADS is appointed for a two-year term, in even-numbered years, contingent upon satisfactory annual review. Mid-cycle appointments are effective to the end of the current cycle. The ADS may be reappointed for subsequent two-year terms.

Eligibility: The ADS is eligible for other AARP or AARP Foundation volunteer positions, but may not hold any other AARP Tax-Aide State Management Team position.

Time Required: The position demands more time from October to May during season planning and training as well as while program reporting and data are collected.

Training Required: The ADS must acquire knowledge of policies and procedures associated with the program (especially administrative), and a basic orientation to AARP and the AARP Foundation.

Travel Required: The ADS attends state meetings as well as any necessary national and/or regional meetings.

Appointment and Supervision: The ADS is appointed by the State Coordinator with concurrence by the Regional Coordinator. The ADS reports directly to the State Coordinator.

Scope of Authority: The ADS implements administrative procedures and signs required reports. The ADS does not supervise any other volunteers.

Working Relations: The ADS works closely with the State Management Team, District Coordinator, and the national office staff.

Progress Review: The ADS' performance is monitored on an on-going basis and reviewed annually by the State Coordinator.

Available Resources: The ADS will be afforded the necessary guidance, training and materials needed to facilitate leadership responsibilities. Additional support and training are provided from the national office staff and/or Regional Coordinator. AARP Tax-Aide reimburses volunteers for covered program related expenses as set out in the Policy Manual.

Volunteer Policy: AARP Foundation volunteers will receive equal opportunity and treatment throughout recruitment, appointment, training, and service. There will be no discrimination based on age, disabilities, gender, race, national or ethnic origin, religion, economic status, or sexual orientation.

Appendix III: Index

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