AARP Foundation Tax-Aide Technology Coordinator (TC) Position Description

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

Purpose of Position: The Technology Coordinator (TC) works with the District Coordinator (DC) and/or state Technology Specialist (TCS) to implement, maintain, and evaluate automated systems for: tax preparation, administrative procedures, and volunteer training.

Responsibilities of Position: Supported by the policies and procedures of AARP Foundation Tax-Aide, the District TC handles the full scope of the responsibilities for a district. Alternatively, a TC may serve as an assistant to the TCS:

➢ Assists in selecting and establishing sites that can offer electronic filing service and in training volunteers to provide the service.
➢ Evaluates need for computer equipment requirements to provide electronic filing of tax returns at sites.
➢ Implements procedures for electronic filing that conform to the requirements of the IRS and AARP Foundation Tax-Aide.
➢ Ensures that each e-file transmitting site has a valid EFIN.
➢ Conducts e-file training and/or helps conduct process-based training in conjunction with Instructors.
➢ Assists the DC and the PCS in the recruitment of e-file volunteers.
➢ Assists the DC and/or the TCS in computer equipment distribution.
➢ Coordinates with the TCS for the maintenance, upgrading and disposition of failed or unusable equipment.
➢ Maintains equipment inventory at the District level.
➢ Encourages efficient utilization of computer equipment.
➢ Loads *TaxWise™* onto site computers or trains Electronic Return Originators (EROs) or other
    e-filing volunteers how to do this.
➢ Provides ongoing technical support to e-filing sites, answering questions and addressing anomalies that occur when e-filing.
➢ Works well with diverse populations.
➢ Assists in implementing and maintaining automated administrative procedures as available, and in developing, implementing, and evaluating automated procedures within the district.
➢ Remains alert for potential donors of computer equipment.
➢ Establishes and maintains a line of communication with the district EROs and Local Coordinators to provide program information in a timely manner.
➢ Establishes and oversees local procedures for taxpayer data protection, including encryption and password protection.

Qualifications: The TC must have a working knowledge of personal computers, software, and electronic communication systems and have access to e-mail and the Internet. Most TCs should also have tax assistance expertise and pass the IRS certification exam. Some TCs handling only non-tax issues such as hardware may not need certification.

Length of Service: The TC is appointed for a one-year term and contingent upon satisfactory annual review may be re-appointed for subsequent one-year terms.

Eligibility: The TC is eligible for other AARP or AARP Foundation volunteer positions.

Time Required: The position may require year-round availability. The time required depends on specific responsibilities. The position is often busiest during October and November, as well as during the tax season when an average of one or two hours per day is typically needed to respond to e-mail and resolve problems.

Training Required: The TC must acquire knowledge of e-filing procedures, including software and hardware issues, as well as undergo a basic orientation to the AARP Foundation Tax-Aide program. Specific training required will be provided by the TCS.

Travel Required: The TC conducts e-file training for volunteers, assists in the implementation and operation of e-filing sites, and attends meetings as necessary.

Appointment and Supervision: District TCs are appointed by the DC, with concurrence of the SC and TCS and report directly to the DC. Up to three TCs handling specific e-filing responsibilities for the state can be appointed by, and report directly to, the TCS with concurrence of the SC.

Scope of Authority: District TCs assist the DC in all matters concerning the use of technology for e-filing of tax returns as well as automated administrative procedures. State TCs assist the TCS in specific responsibilities of e-filing at the state level.

Working Relationships: TCs maintain a close relationship with the TCS, the DC, other TCs, EROs, and Counselors.

Progress Review: The TC's performance is monitored on an on-going basis and reviewed annually by the supervising District Coordinator and the TCS.

Available Resources: The TC will be afforded the necessary guidance, training and materials, which are available from the National Office staff, National Technology Committee, AARP field staff, SC, TCS, and IRS staff. Reimbursement for program-related expenses is covered 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.