AARP Foundation Tax-Aide Technology Specialist (TCS) Position Description

The role of the State Management Team (SMT) is to serve as the AARP Foundation 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 TCS 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 with respect to automated systems for tax preparation, administrative procedures, and volunteer training. The TCS serves as the subject matter expert on a variety of infrastructure and technology 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 Foundation Tax-Aide program.

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 ages 60 and older.

Purpose of Position: The Technology Specialist (TCS) works with the State Management Team to implement, maintain, and evaluate automated systems for: tax preparation, administrative procedures, and volunteer training.

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

➢ Serves on the State Management Team (SMT) and coordinates technology-related responsibilities with the SC and other Specialists on the SMT.
➢ Evaluates need for computer hardware and software to provide electronic filing of tax returns at sites.
➢ Assists District Coordinators (DCs) in recruiting local Technology Coordinators (TCs) to provide on-going day-to-day technical support within districts.
➢ Assists DCs and TCs in selecting and establishing sites that can offer electronic filing service and assists in training volunteers to provide the service.
➢ Establishes statewide procedures for electronic filing that conform to the requirements of IRS, the state's tax revenue office (if there is one) and AARP Foundation Tax-Aide guidelines.
➢ Ensures that each e-file transmission site within the state has a valid EFIN.
➢ Submits orders for tax software with input from DCs and District TCs.
➢ Submits orders for IRS-provided computers with input from SC, DCs and TCs.
➢ Submits orders for AARP equipment with input from SC, DCs and TCs.

- Encourages the involvement of diverse populations in AARP Tax-Aide activities.
- Supports SMT implementation of automated administrative procedures as they are available and suitable for state operations.
- Encourages efficient utilization of computer equipment and tax preparation software.
- Administers controls on spending for e-file supplies and recommends low cost sources for them.
- Assists the TRS in development and implementation of e-file integrated training.
- Trains new and provides on-going guidance to TCs.
- Establishes and maintains a line of communications to provide current e-file program information during the tax season.
- Coordinates computer equipment distribution within the state and coordinates hardware maintenance, upgrading and disposition of failed or unusable equipment.
- Maintains equipment inventory at the state level and provides required inventory reports.
- In conjunction with the Partnership & Communications Specialist, encourages solicitation of suitable donated computer equipment for use in the e-file program.
- Appoints (with concurrence of the SC), trains, supervises and evaluates, as needed for effective management of workload, up to three Technology Coordinators who may be assigned any one or more of the above responsibilities to be carried out on behalf of the TCS.
- Oversees implementation of procedures to protect taxpayer data at all times, including the use of encryption and password protection.
- With the assistance of the TRS provides training of District TCs and assures that ERO's are trained for their important duties.

Qualifications: The TCS must have a working knowledge of personal computers, software, and electronic communication systems and have access to e-mail and the Internet. The TCS should also have tax assistance experience. AARP Membership is desirable.

Term of Service: The TCS 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 TCS may be reappointed for subsequent two-year terms.

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

Time Required: This is a year-round position. Emphasis is greatest during October to April, when an average of one to two hours per day may be needed.

Training Required: The TCS must acquire the knowledge of electronic filing procedures in his/her state and other procedures associated with the program and its volunteers, as well as a basic orientation to AARP. Specific required training will be provided to persons with appropriate experience. The TCS will be expected to develop proficiency in the use of the tax preparation software program provided by the IRS.

Travel Required: The TCS must conduct TC and other training for volunteers, assist in the implementation of e-filing sites, and attend national, regional, and state meetings as necessary.

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

Scope of Authority: The TCS assists the SC in all matters concerning the use of technology for electronic filing of tax returns and automated administration. The TCS may directly supervise up to three TCs who serve as assistants to the TCS.

Working relationships: The TCS works closely with all TCs in the state, the SMT, the National Technology Committee, AARP Foundation Tax-Aide volunteer leaders, and the IRS.

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

Available resources: The TCS 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 Foundation 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.

NOTE: As noted above under Scope of Authority, a TCS may directly supervise up to three TCs who serve as assistants to the TCS.   In some states, duties are divided into TC-Admin for the administrative aspects of TCS duties (including form 8633 applications and revisions of EFINs),TC-Software (for all aspects of the *TaxWise*™, and other software), and TC-Hardware (for inventory and dissemination of all computer equipment). Position descriptions for these three positions are available on request to TaxAideTech@aarp.org. Note that these position descriptions are not mandatory; other divisions of duties can be used as determined by the SC and TCS for a state.