

Morris County AARP Tax-Aide – 2020-2021 Calendar

10/29/2020 Revision 1.0

Attached is the Morris training calendar for TY 2020. All scheduled Meeting will be held virtually most likely on Google Meet. You do not have to have a Chromebook or even be on Chrome to participate in these Meeting. All you need is an invitation or the meeting number. Since we cannot meet as a group, most of the training will be self-study with the Google Meets used to answer questions.

New Volunteer Training

New volunteers are to complete all the Familiarization Classes and problems along with the Integrated Tax Law/TaxSlayer core problems of Anderson, Baker, Caldwell and Davenport. In addition, there is a session on New Jersey property tax programs along with PTR training. **Second year volunteers are also encouraged to do the core problems and attend the Google Meets schedule for each one.**

Advanced Training and Counselor Workshops

At the December 18 All Hands Meeting questions will be answered on new tax law and TaxSlayer items. You will receive a slide deck in advanced with all those changes. Proficiency requirements will be discussed.

At the All Hands meeting in January, someone from the State will be available to answer questions on new State items. You will receive information in advance of that meeting.

All volunteers are to attend **one** of the Advanced Topic Classes as well as **one** of the Counselor Workshop Google Meets. More on this later.

Audience Code

The audience Code in the notes designates the primary target group for the training.

NV = New Volunteers	L = Leadership	QR = Quality Reviewers
2 ND = 2 nd year volunteers	ERO = EROs	VRC = Virtual Return Coordinator
RV = Returning Volunteers	CF = Client Facilitators	
M = Mentors	SC = Site Coordinator	

Calendar Code

Meet = Google Meet Session – Invitation and/or meeting number will be emailed to you

Items in Red = Due dates for the various steps of proficiency

NOVEMBER 2020

MONDAY

TUESDAY

WEDNESDAY

THURSDAY

FRIDAY

SAT/SUN

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SAT/SUN
1						1
WEEK 1	notes					
2	2	3	4	5 Meet Leadership Meeting 1PM-4PM	6	7/8
WEEK 2	notes			1PM-4PM L, SC, ERO, VRC		
3	9	10 Meet FMA-1 Introduction to Familiarization	11 Work on Brown Problem	12	13	14/15
WEEK 3	notes	10AM-3PM NV, M				
4	16	17 Meet FAM-2 Review Brown and assign more practice	18 Work on Practice Problems	19	20	21/22
WEEK 4	notes	10AM-3PM NV, M				
5	23 Meet FAM-3 Review problems Discuss what's next	24 Work on Core Problem Andrews	25	26 Happy Thanksgiving	27	28/29
WEEK 5	notes 10AM-3PM NV, M					
6	30					
WEEK 6						

DECEMBER 2020

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SAT/SUN
WEEK 1		1	2	3	4	5/6
notes						
WEEK 2	7 Meet Review 1 Discuss Andrews Begin Baker	8 Work on Core Problem Baker	9	10	11 Happy Hanukkah	12/13
notes	10AM-3PM NV, 2 ND , M					
WEEK 3	14	15	16 Meet (Revised) Review 2 Discuss Baker Begin Caldwell	17 Work on Core Problem Caldwell	18 Meet All Hands Meeting	19/20
notes			10AM-3PM NV, 2 ND , M		10AM -3PM All Volunteers	
WEEK 4	21	22	23 Meet Review 3 Discuss Caldwell Begin Davenport	24 Work on Core Problem Davenport	25 Merry Christmas	26/27
notes			10AM-3PM NV, 2 ND , M			
WEEK 5	28	29	30	31		
notes						

JANUARY 2021

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SAT/SUN
WEEK 1 K					1 Continue Work on Core Problem Davenport	2/3 →
WEEK 2 K	4 Proficiency Part 1 Due →	5 Meet Review 4 Discuss Davenport	6	7 Meet Review 5 Discuss NJ Property Tax Programs. Do PTR Problem	8	9/10
WEEK 3 K	11 Meet QR Training	12	13 Meet Specialized Topics	14 Proficiency Part 2 (IRS test) Due	15 Meet All Hands Meeting State	16/17
WEEK 4 K	18 Meet Advanced Topics TBD	19 Meet Advanced Topics TBD	20 Meet Advanced Topics TBD	21 Meet Chromebook class for new volunteers & anyone interested	22 Meet ERO/VRC Meeting	23/24 Proficiency Part 3 Due (if required)
WEEK 5 K	25 Meet Counselor Workshops TBD	26 Meet	27 Meet	28 Meet	29	30/31
WEEK 6 K	notes 10AM-3PM All Volunteers	notes 10AM-3PM All Volunteers	notes 10AM-3PM All Volunteers	notes 10AM-3PM All Volunteers		