



Appointment Plus (DaySmart)

FREE COMMUNITY TAX SERVICE SCHEDULING
SOFTWARE

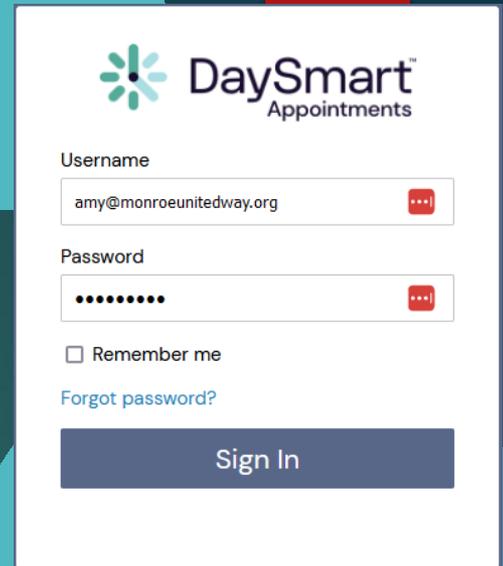


Creating Appointments



Go to appointment-plus.com

- The company changed names, now it's called DaySmart Appointments. Log in at https://account.appointment-plus.com/ap/ap_admin_v2/login.php
- Click "Log In" on the top menu bar
- Enter your username and password (provided in an email from VITA coordinator)
- Click "Sign In"



The screenshot shows the login interface for DaySmart Appointments. At the top left is the logo, which consists of a green starburst icon followed by the text "DaySmart" in a bold, sans-serif font and "Appointments" in a smaller font below it. Below the logo are two input fields: "Username" containing the email address "amy@monroeunitedway.org" and "Password" containing a series of black dots. To the right of each input field is a red square button with three white dots. Below the password field is a checkbox labeled "Remember me" and a blue link that says "Forgot password?". At the bottom of the form is a dark blue rectangular button with the text "Sign In" in white.

How to schedule Appointments

- Click on the site you want to schedule in the drop-down list
- Next, click the date you want or start clicking through the next dates the site will be open to find the first available slot.
- 0/3 means all three appointments are open.
- If the day is all gray, the site is closed that day.

The screenshot shows the Appointment-plus web interface. At the top, the logo reads "Appointment-plus" with the tagline "Simplifying Scheduling for Non-Profits". Below the logo is a navigation menu with tabs for "Appointments", "Clients", "Reports", "Sites", "Services", "Events", "Lists", "Pages/Text", and "Layout".

The main content area is titled "View Schedule For:" and features a dropdown menu currently set to "All Sites". A list of sites is displayed below the dropdown, including "Broadview Learning Center", "Brown County Library", "Chinese Student Site", "City Hall", "CityHall- consultations", "Ellettsville Tax Site", "Ivy Tech", "Owen County Library", "SCCAP", and "Stone Belt".

Below the site list is a calendar grid for the month of January 2020. The date "Thursday, January 30, 2020" is selected. The calendar shows a grid of dates from 29 to 31, with the 30th highlighted.

At the bottom left, there is a section titled "Appointments" with three options: "Client Search", "Appointment Report", and "View Waiting List (0)".

The main scheduling area displays a calendar for "Thursday, January 30, 2020". The time slots range from 2:00 pm to 8:00 pm. The "Broadview Learning Center" site is selected, and its schedule is shown in a table. The table has two columns: one for the site name and one for the number of appointments. The rows show the following data:

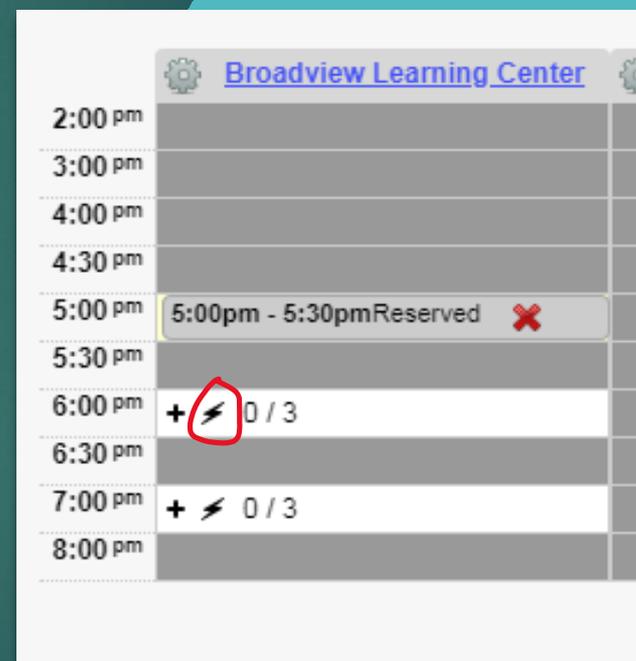
Time Slot	Appointments
2:00 pm	
3:00 pm	
4:00 pm	
4:30 pm	
5:00 pm	+ ⚡ 0 / 3
5:30 pm	
6:00 pm	+ ⚡ 0 / 3
6:30 pm	
7:00 pm	+ ⚡ 0 / 3
8:00 pm	

NOTE: Quick Reserve

➤ Clicking on the “lightning bolt” icon will quickly block off the entire appointment slot at once.

➤ (If the site was short on volunteers and you didn't want to schedule anything more for a certain day this could be used.)

➤ Click the Red X on a reserved time slot to open it up again.

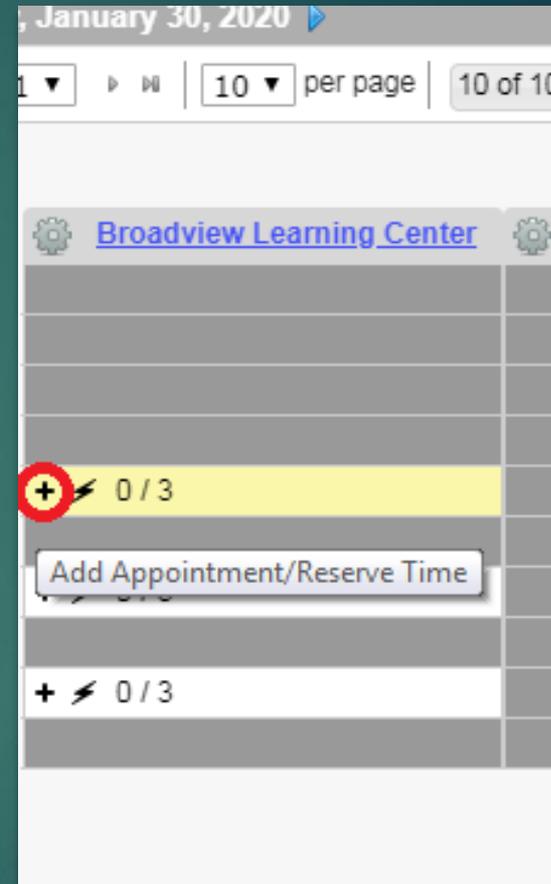


The screenshot shows a scheduling interface for "Broadview Learning Center". The interface displays a list of time slots from 2:00 pm to 8:00 pm. The 5:00 pm slot is reserved, indicated by a yellow background and a red 'X' icon. The 6:00 pm and 7:00 pm slots have a lightning bolt icon and a plus sign, with a "0 / 3" next to them, indicating a limit on reservations. A red circle highlights the lightning bolt icon in the 6:00 pm slot.

Time Slot	Status
2:00 pm	Available
3:00 pm	Available
4:00 pm	Available
4:30 pm	Available
5:00 pm	Reserved (5:00pm - 5:30pm Reserved)
5:30 pm	Available
6:00 pm	Available (+ ⚡ 0 / 3)
6:30 pm	Available
7:00 pm	Available (+ ⚡ 0 / 3)
8:00 pm	Available

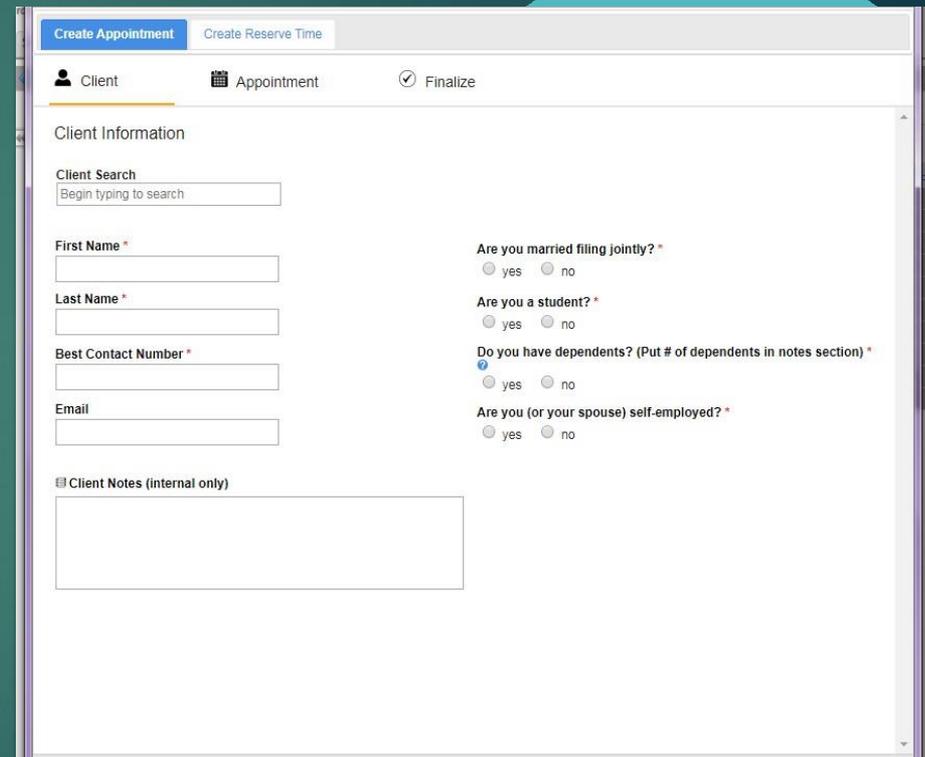
How to Create an Appointment

▶ Click on the “+” sign on an appointment slot that has an opening to get started.



Type the client's name in the Client Search box

- Their information will populate if they have been a client in the past.
- Confirm the phone number and email address are still accurate
- If nothing comes up in the search box, enter their information manually.



The screenshot shows a software interface for creating an appointment. At the top, there are two tabs: "Create Appointment" (selected) and "Create Reserve Time". Below the tabs, there are three icons: a person icon labeled "Client", a calendar icon labeled "Appointment", and a checkmark icon labeled "Finalize".

The main section is titled "Client Information" and contains several input fields and checkboxes:

- Client Search:** A text input field with the placeholder text "Begin typing to search".
- First Name *:** A text input field.
- Last Name *:** A text input field.
- Best Contact Number *:** A text input field.
- Email:** A text input field.
- Are you married filing jointly? *:** Radio buttons for "yes" and "no".
- Are you a student? *:** Radio buttons for "yes" and "no".
- Do you have dependents? (Put # of dependents in notes section) *:** Radio buttons for "yes" and "no".
- Are you (or your spouse) self-employed? *:** Radio buttons for "yes" and "no".
- Client Notes (internal only):** A large text area for notes.

Email addresses

- Email addresses are not required but are highly encouraged.
- They will be sent two reminder emails with information about what they need to bring to their appointment.



Client Questions

Are you married filing jointly? *

yes no

Are you a student? *

yes no

Do you have dependents? (Put # of dependents in notes section) *



yes no

Are you (or your spouse) self-employed? *

yes no

- You will have to answer each of these questions in order to book the appointment.
- Put the number of dependents in the Notes section.
- This will help the site coordinator estimate how long it will take to prepare the return.

EX: It takes much longer to enter the information for five dependents than it does with just two.)

Confirm Appointment details

The screenshot shows a 'Create Appointment' form with the following fields and annotations:

- Client:** Test Customer
- Appointment:** Appointment
- Finalize:** Finalize
- Appointment Information:**
 - Date:** February 2, 2023
 - Location:** United Way of Monroe County
 - Status:** Scheduled
- Service:** Free Tax Appt
- Site:** Broadview Learn
- Time:** 5:00pm
- Duration:** 1 hour
- Special Instructions to/from Client:** READ TO CLIENT BEFORE FINALIZING: You must bring the following to your appointment:
 - Your (and spouse's) valid picture ID
 - Original, physical, Social Security cards for you (& spouse) and birth dates for any dependents. *COPIES ARE NOT ACCEPTED*
 - All W-2s, W-2Gs, 1099s and Social Security/Unemployment
- Appointment Notes (internal only):** (Empty text area)

Yellow circles highlight the 'Appointment' and 'Finalize' buttons, and the 'Appointment Information' section. A red circle highlights the 'Special Instructions to/from Client' section.

- Read the information on this screen to the client to make sure this is what they want (and they write it down!)
- ***VERY IMPORTANT***
Read the Special instructions to the Client box.
- If everything looks okay, click the next button at the bottom right side of the screen.

Finalize Appointment

- Click the blue "Finalize Appointment" button on the bottom right.

The screenshot shows a web browser window titled "Site Administration - Google Chrome" with the URL `account.appointment-plus.com/ap/ap_admin_v2/slots_frame_v2.php?wait_id=&emp_type_id=&vp_appt_date=20200206&sele...`. The page has two tabs: "Create Appointment" (active) and "Create Reserve Time".

At the top, there are three tabs: "Client", "Appointment", and "Finalize" (selected). To the right, the client information is displayed: "Test Customer", "1111111111", and "amy@monroeuinitedway.org".

The main content area is titled "Finalize Appointment". It contains the following information:

- Client:** Test Customer
- Location:** United Way of Monroe County
- Status:** Scheduled
- Created By:** Broadview Learning Center

On the right side, the appointment details are shown:

- Date/Time:** Thursday, February 6, 2020, 5:00pm - 6:00pm
- Month/Day:** Feb 06
- Service:** Free Tax Appointment
- Site:** Broadview Learning Center

Below this information is a "Notifications" section with a checked checkbox: "Send appointment email to client".

At the bottom right, there are two buttons: a grey "Back" button and a blue "Finalize Appointment" button.

- You will see a green banner across the top that says “Appointment was successfully created”
- At the bottom you will have options to cancel or edit the appointment in case the client needs to change something.
- Click the red X at the top right to go back to the home dashboard.

Appointment Confirmation Page - Google Chrome

account.appointment-plus.com/ap/ap_admin_v2/make_appointment_confirmation.php?apptid=1723851&action=finalizeappt

Appointment has been successfully created.

Client Information

[Edit Details](#) [Profile](#)

First Name
Test

Last Name
Customer

Best Contact Number
1111111111

Email
amy@monroeunitedway.org

Are you married filing jointly?
yes

Are you a student?
no

Do you have dependents? (Put # of dependents in notes section)
yes

Are you (or your spouse) self-employed?
yes

Client Notes (Internal only)

12/10/2019
3 dependents

12/10/2019
2 dependents

[View all notes](#)

Appointment Information

Thursday, January 30, 2020 Jan 30
5:00pm - 6:00pm US/Eastern

Appointment Details

United Way of Monroe County

Site **Service**

Broadview Learning Center Free Tax Appointment

Status Information

Status
Scheduled

Created By: Amy on 12/17/2019 at 4:42pm
Last Updated By: Amy on 12/17/2019 at 4:42pm

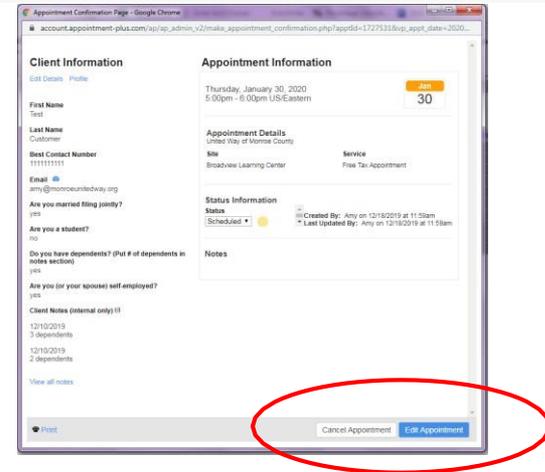
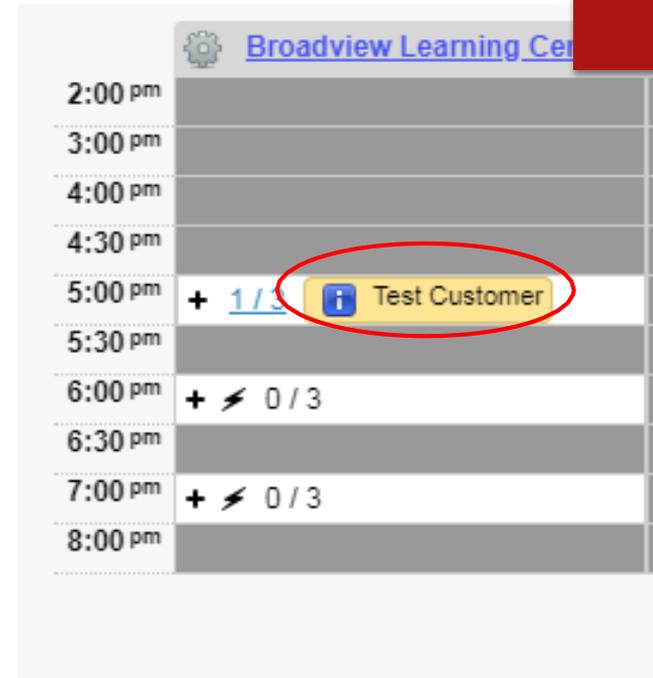
Notes

[Print](#) [Cancel Appointment](#) [Edit Appointment](#)

Canceling Appointments

Cancel or Change

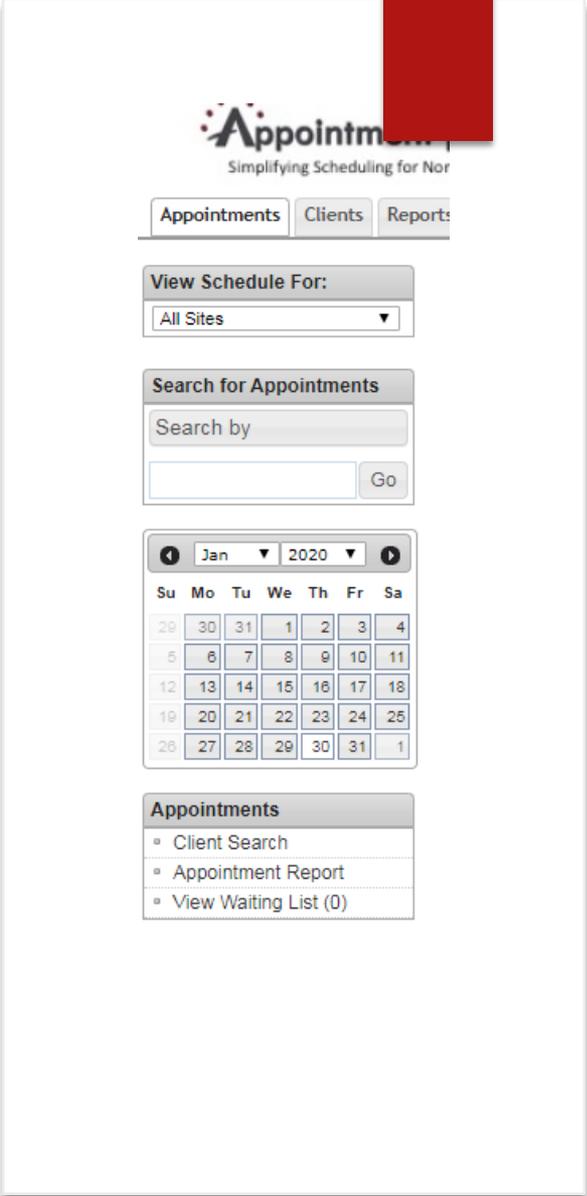
- Click on the name of the person that needs to cancel or change their appointment
- Their appointment will open up, at the bottom you can select cancel or edit
- Cancel and close out the window.
- To edit: it will open up the appointment and you can change the date, time, etc., and then finish as you do with any appointment.



View open slots at other sites

DO NOT MAKE APPOINTMENTS FOR OTHER SITES!

- You may view openings and refer clients to call the site directly to make an appointment.
- Click on the Appointments tab on the top left menu, then you can select a specific site or view all sites.
- You must select a day on the calendar to view open appointments.



The screenshot displays the Appointment system interface. At the top, the logo reads "Appointment" with the tagline "Simplifying Scheduling for Nor". Below the logo are three navigation tabs: "Appointments", "Clients", and "Reports".

The "View Schedule For:" section features a dropdown menu currently set to "All Sites".

The "Search for Appointments" section includes a "Search by" input field and a "Go" button.

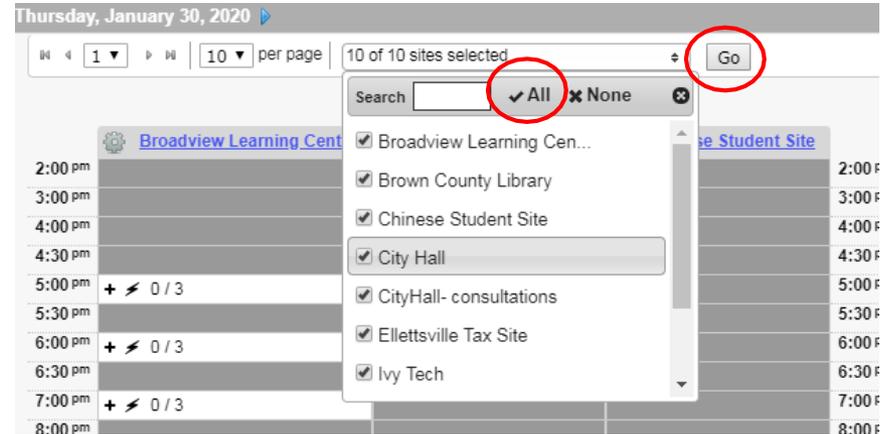
A calendar for January 2020 is shown, with days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and dates (29, 30, 31, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 1).

The "Appointments" section contains a list of options:

- Client Search
- Appointment Report
- View Waiting List (0)

To view all sites

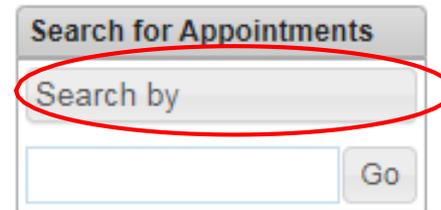
- Make sure the gray bar above the appointment slots shows “10 of 10 sites selected” in order to view all the sites at once.
- If it does not say this, click the drop-down menu, click on “All” and then Go



View all appointments for client

- Some people may make multiple appointments at different sites.
- To check to see if a client already has an appointment somewhere else:
- Click the bar that says Search By
- Click on Firstname and Last name,
- Then type either the first or the last name into the search field next to the Go button and click Go.

Step 1

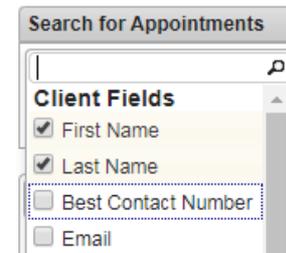


Search for Appointments

Search by

Go

Step 2

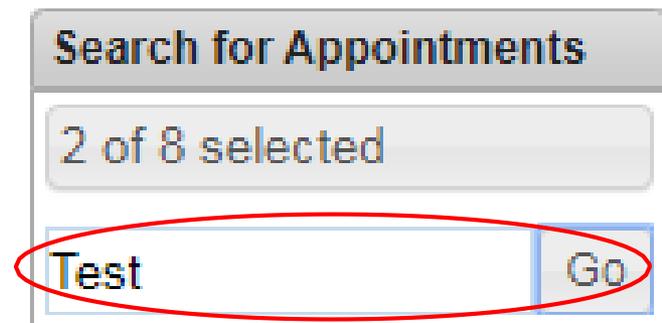


Search for Appointments

Client Fields

- First Name
- Last Name
- Best Contact Number
- Email

Step 3



Search for Appointments

2 of 8 selected

Test Go

Appointment Search Results

Appointment Search Results

Showing 1 to 1 of 1 entries Previous **1** Next

	Location	Client	Date	First Name	Last Name
View	United Way of Monroe County	Test Customer	February 6, 2020 5:00pm EST	Test	Customer

Showing 1 to 1 of 1 entries Previous **1** Next

Your search results will appear like this, you can click the blue View link to open the appointment box and see more details, cancel or change the appointment.

Contact Information for other sites

<https://www.unitedwaysci.org/freetaxes-sites>

All site contact information is listed on this site in alphabetical order. Bookmark this page or print it out, or keep a copy of the Free Tax Service brochure on your desk!

Thank you!

Any questions or problems: Contact
VITA Coordinator: Catherine
Blankensop, catherine@monroeunitedway.org,
812-269-1244