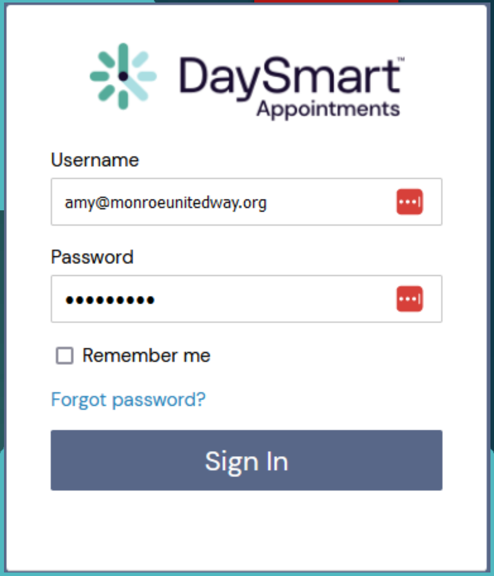
Appointment Plus (DaySmart)

FREE COMMUNITY TAX SERVICE SCHEDULING SOFTWARE

Creating Appointments

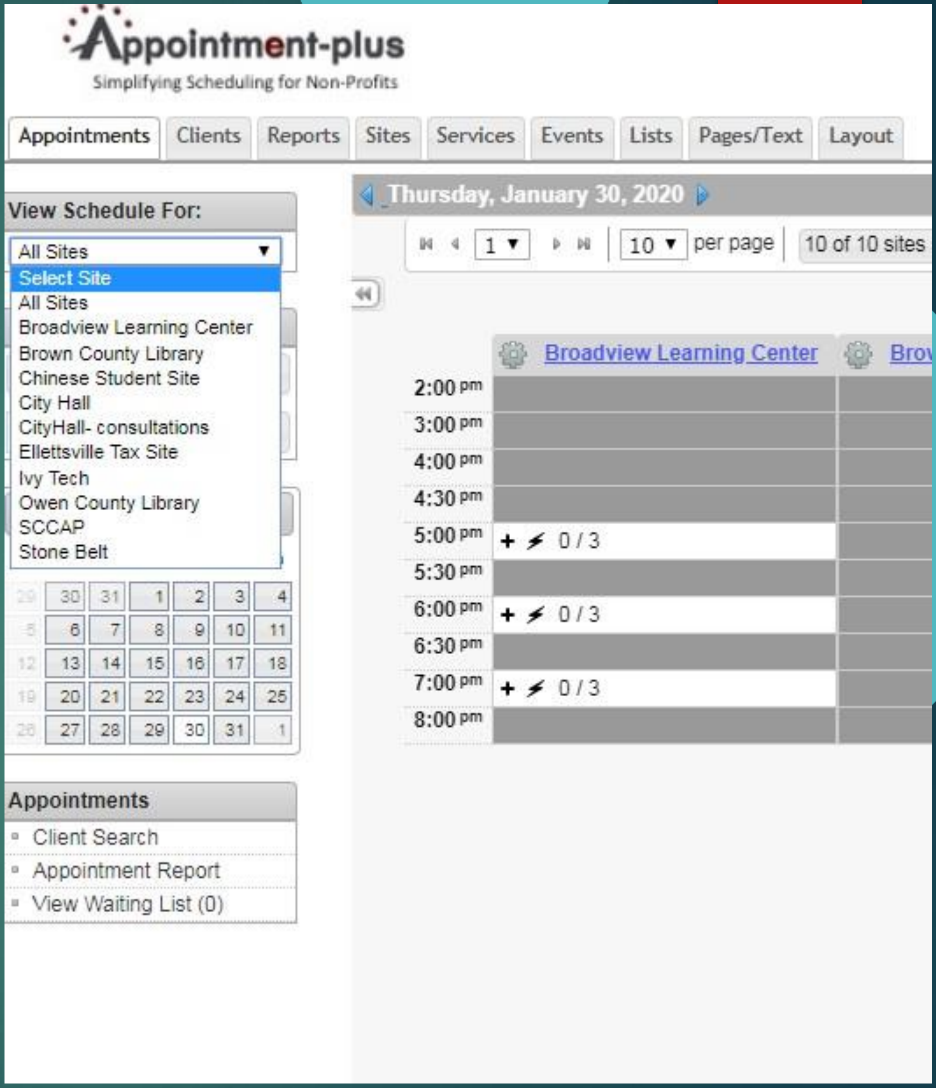
Go to appointment-plus.com



- 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"

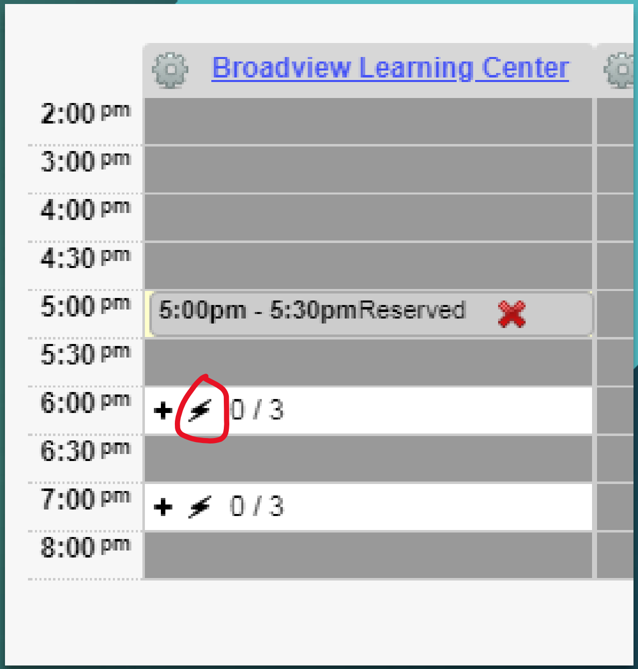
How to schedule Appointments

- 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.

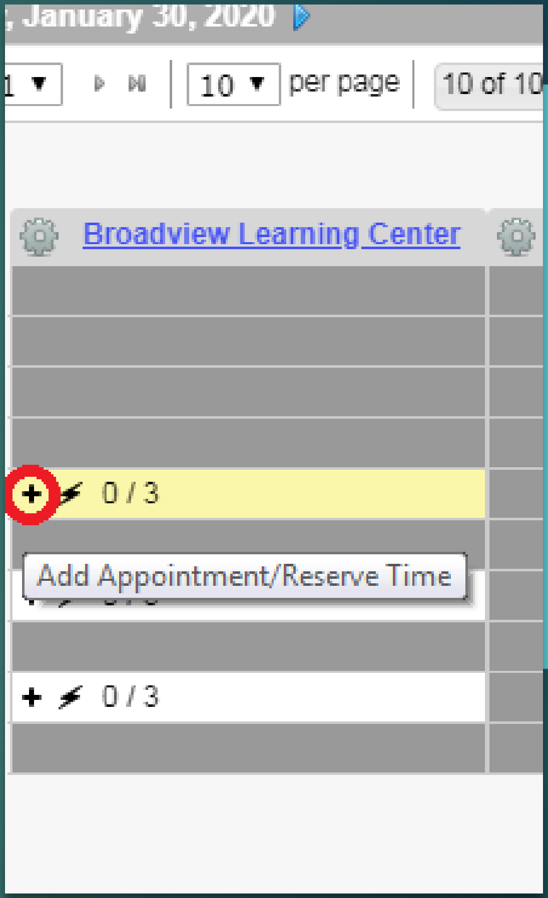


NOTE: Quick Reserve

- 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.



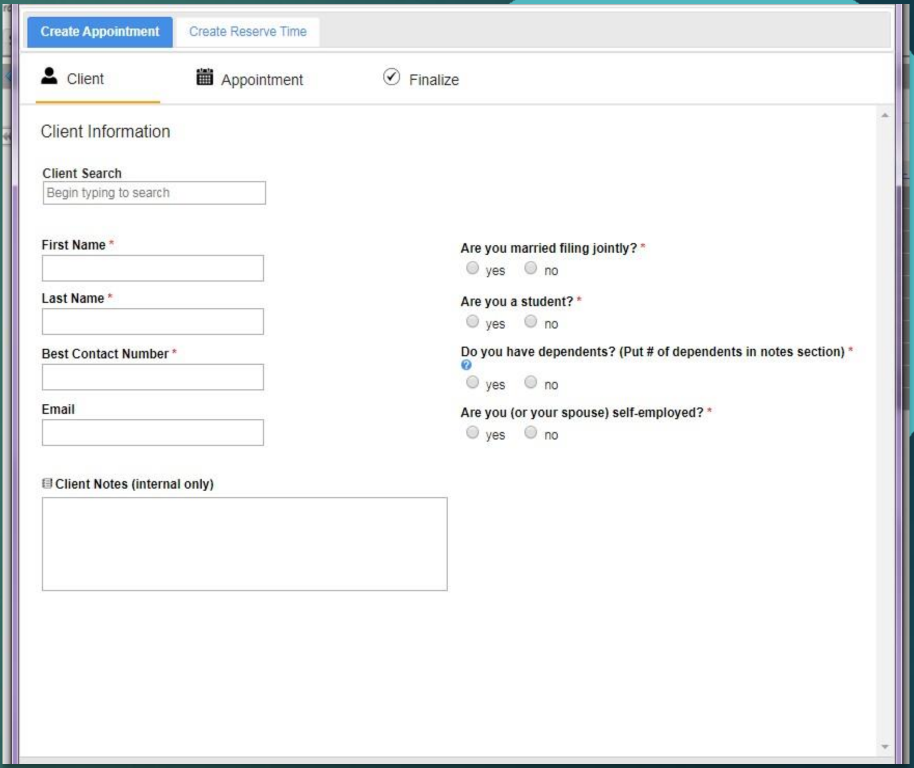
How to Create an Appointment



- 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

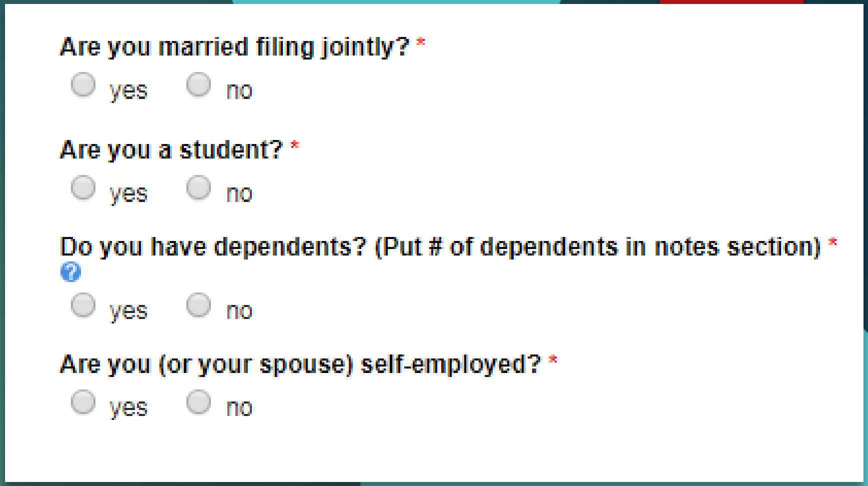
- Their information will populate if they have been a client in the past.
- Confirm the phone number and email address are still accurate
- If nothing comes up in the search box, enter their information manually.



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

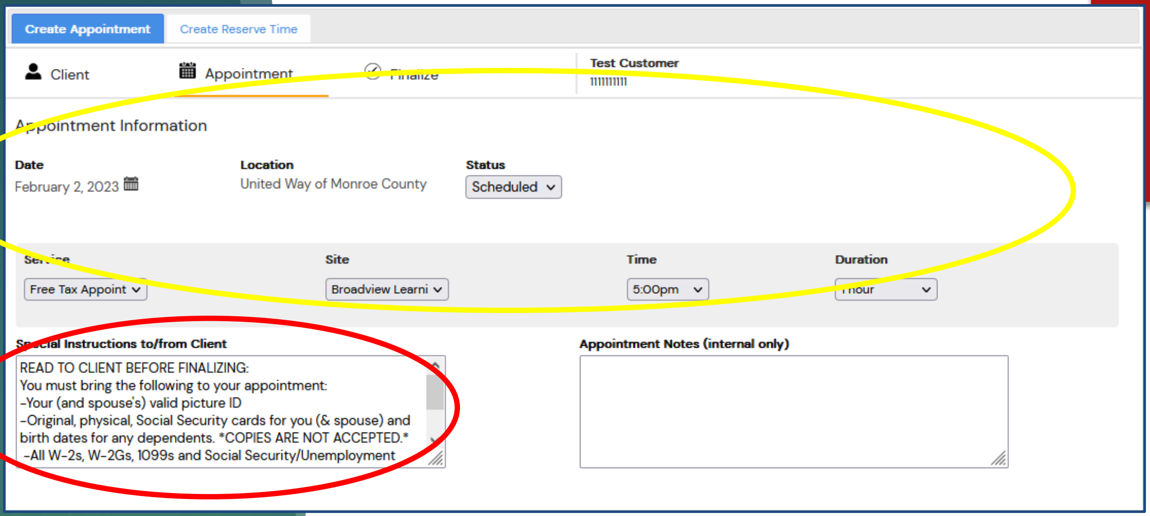
Do you have dependents? (Put # of dependents in notes section) *
yes no

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



- Read the information on this screen to the client to make sure this is what they want (and they write it down!)

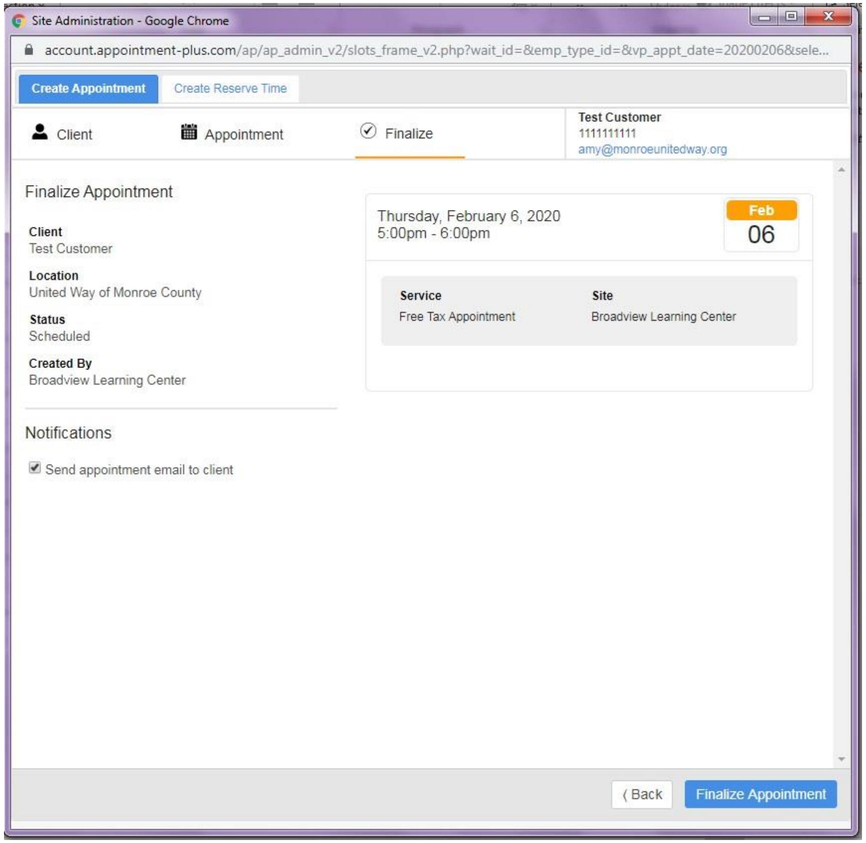
- *VERY IMPORTANT*

Read the Special instructions to the Client box.

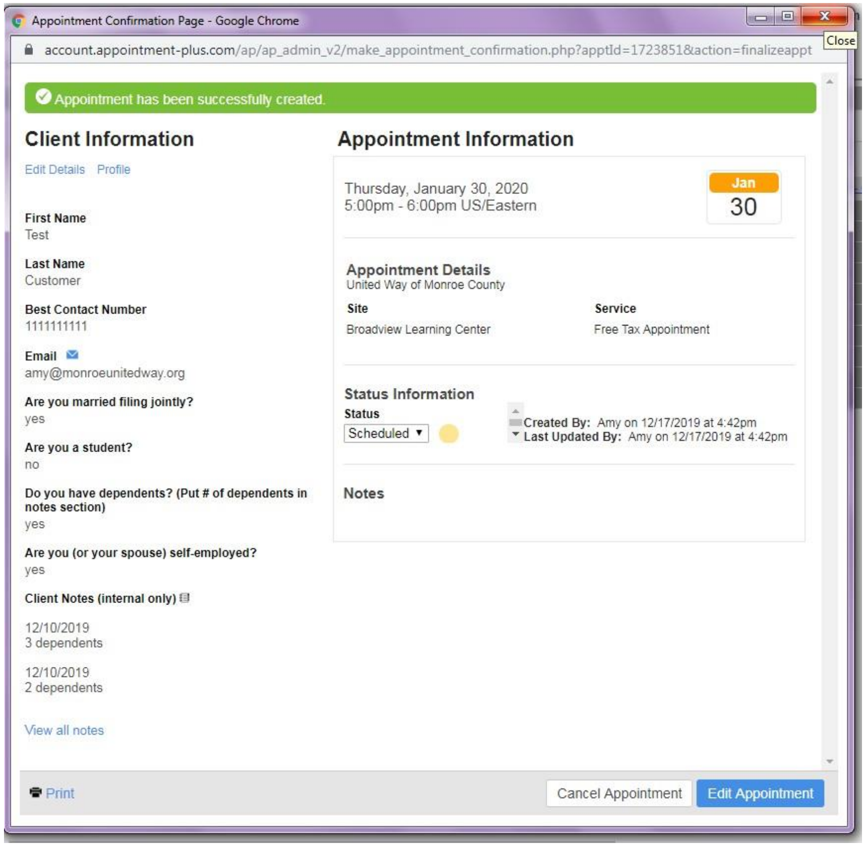
- f everything looks okay, click the next button at the bottom right side of the screen.

Finalize Appointment

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



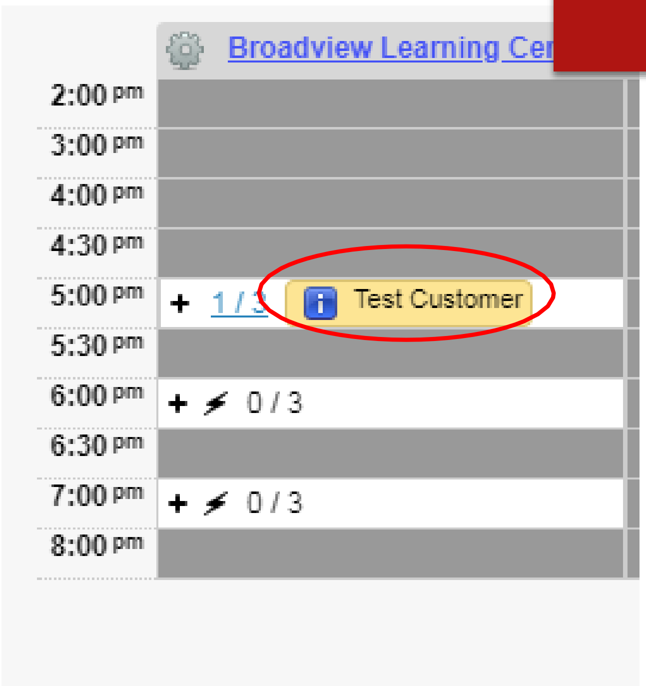
- You will see a green banner across the top that says “Appointment was successfully created”
- At the bottom you will have options to cancel or edit the appointment in case the client needs to change something.
- Click the red X at the top right to go back to the home dashboard.

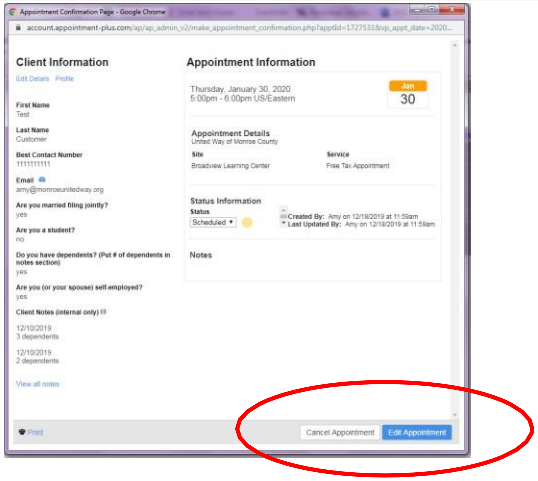


Canceling Appointments

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.

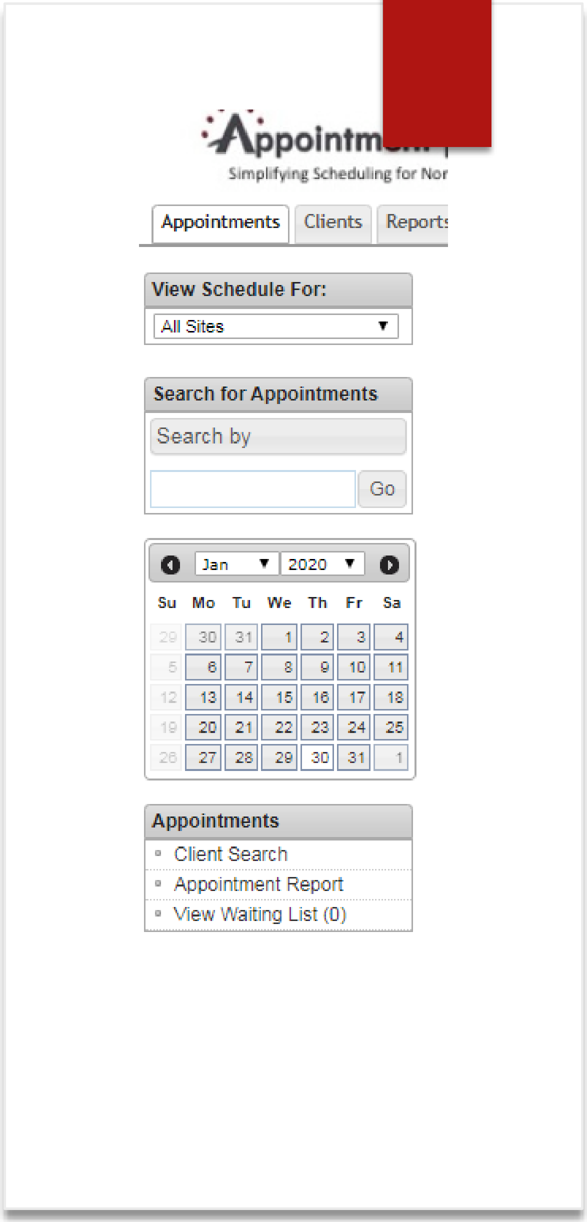




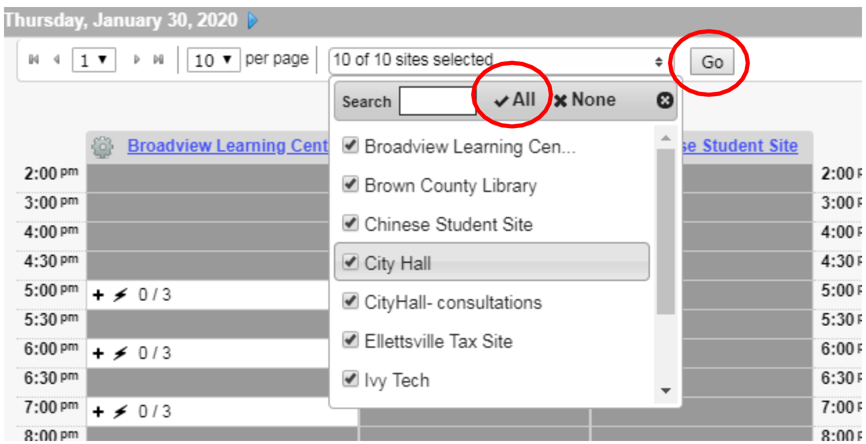
View open slots at other sites

DO NOT MAKE APPOINTMENTS FOR OTHER SITES!

- You may view openings <u>and refer clients to call the site directly to make an appointment.</u>
- 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.



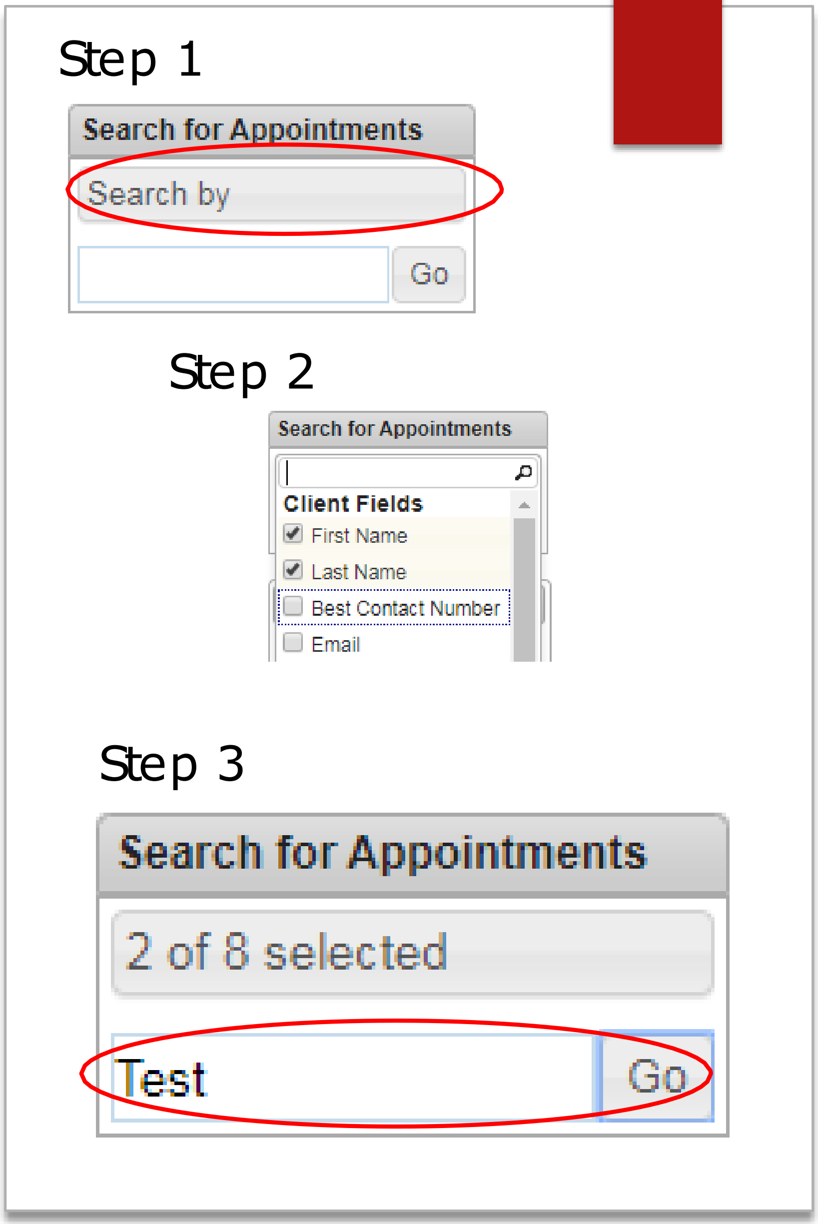
To view all sites



- 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 First name and Last name,
- Then type either the first or the last name into the search field next to the Go button and click 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