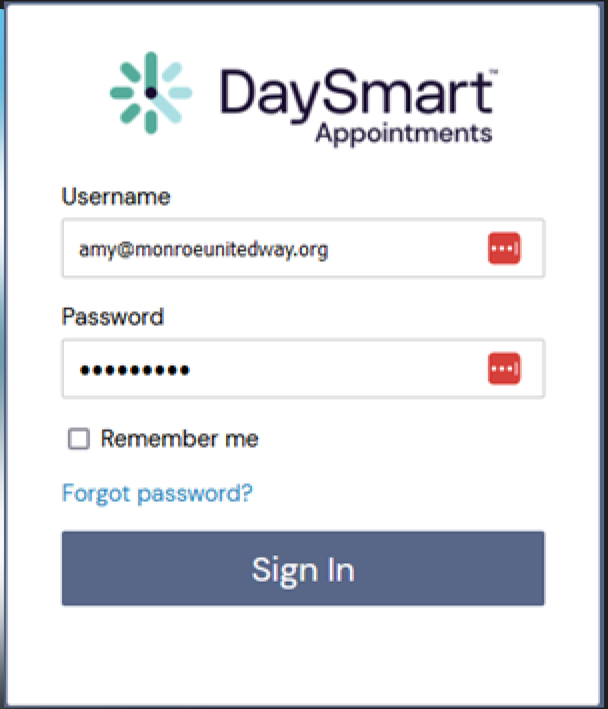
DaySmart Guide

FREE COMMUNITY TAX SERVICE SCHEDULING SOFTWARE

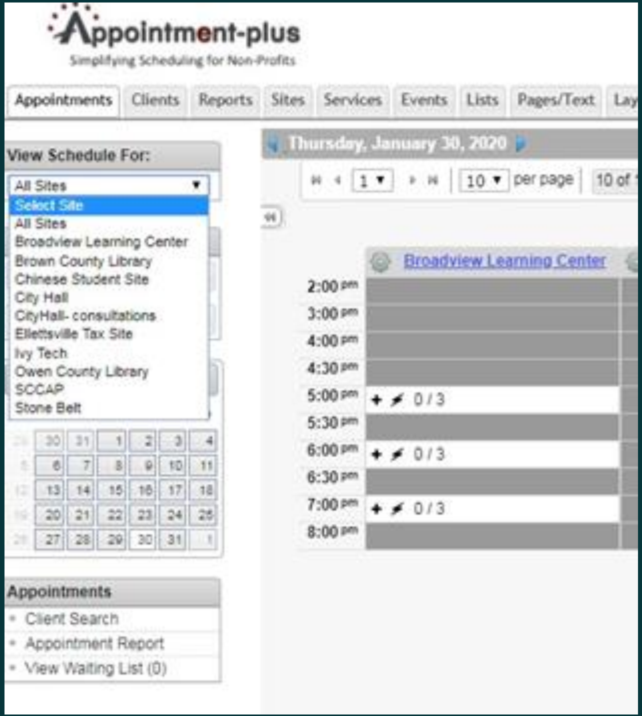
United Way of South Central Indiana

How to Log In to Your DaySmart Account



1. Go to daysmart.com
2. Click **"Log In"** on the top menu bar
3. Enter your **username and password**
    - *(These were provided to you by the VITA coordinator via email)*
4. Click **"Sign In"**

How to Schedule Appointments



1. **Choose the Site**
   From the drop-down menu, click the **site where you want to schedule.**

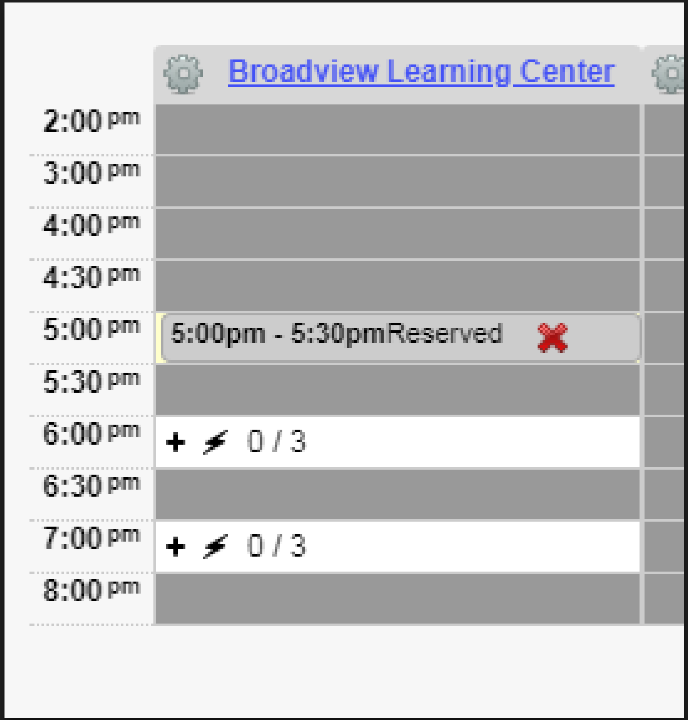
2. **Select a Date**
   - Click the date you want **OR** scroll forward to find the **next available day** the site is open.

3. **Check Availability**
   - Example: **0/3** means **all three appointment slots are open.**
     If the day appears **gray**, it means the **site is closed** that day.

Quick Reserve Feature

NOTE: You can quickly block off an entire appointment slot using the **"lightning bolt" icon**.

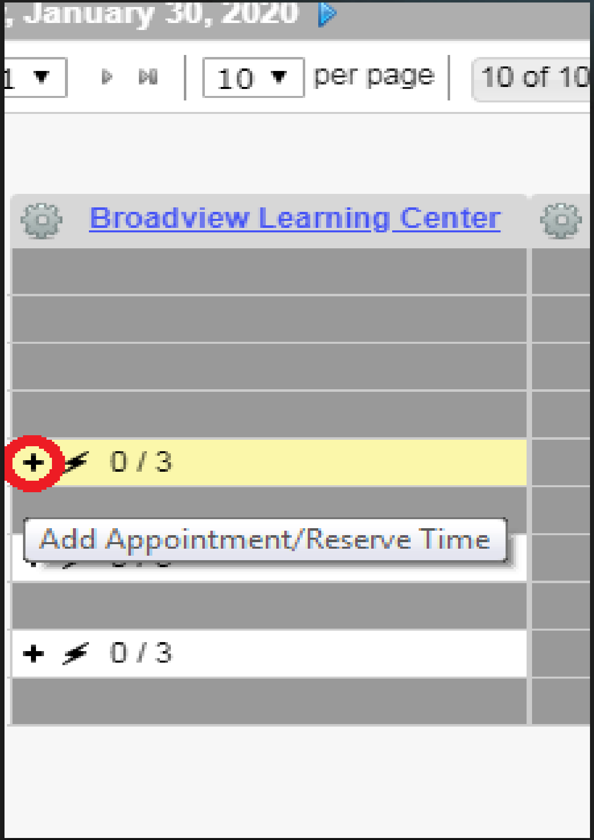
- This is helpful if the site is **short on volunteers** and you **don't want any more appointments scheduled** for that day.
- To **reopen** a reserved time slot, simply **click the red "X"** on that time block.



How to Create an Appointment

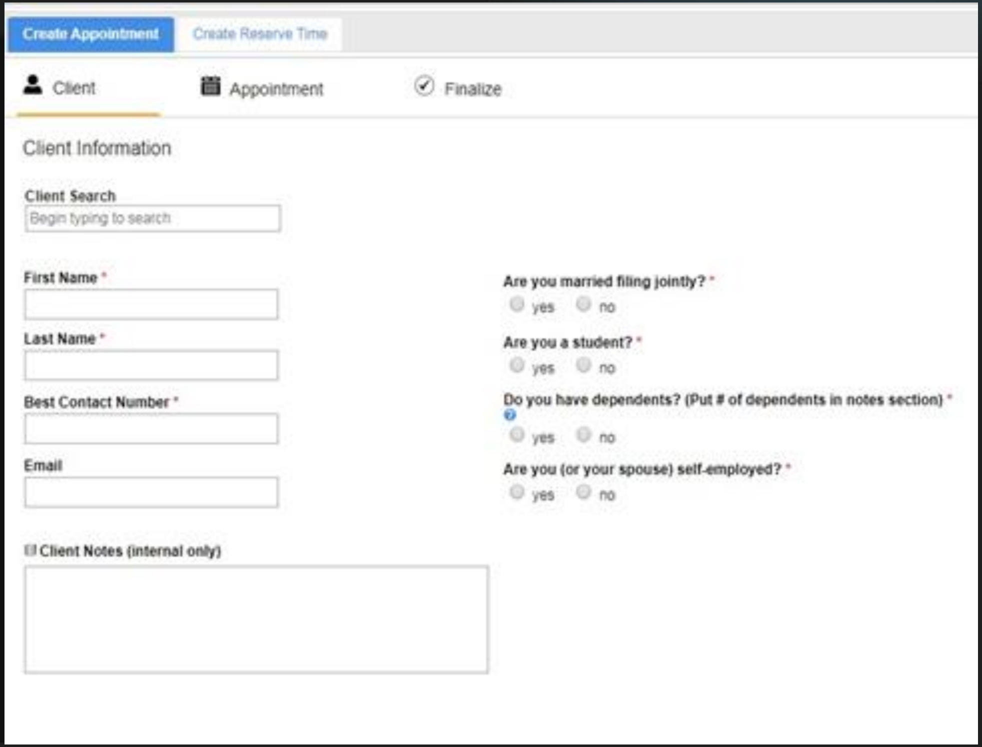
1. Look for an **open appointment slot.**

2. Click the **"+" sign** to begin creating the appointment.



Client Information

1. **Search for the Client**
   - Type the client's name in the **Client Search** box.
   - If they've been a client before, their information will automatically populate.
2. **Verify Contact Details**
   - Confirm that the **phone number** and **email address** are still accurate.
3. **New Client?**
   - If nothing appears in the search box, **enter their information manually**.



Email Addresses

- Email addresses are **not required**, but they are **highly encouraged**.
- Clients who provide an email address will receive **two reminder emails** with important information about:
    - What they need to **bring to their appointment**
    - **Appointment details and confirmation**

Client Questions

You must answer **all required questions** before booking the appointment.

➤ **Include the number of dependents** in the **Notes section**

This helps the site coordinator estimate how long the tax return may take.

Example:

- **2 dependents** → faster return
- **5 dependents** → more time needed to enter information


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

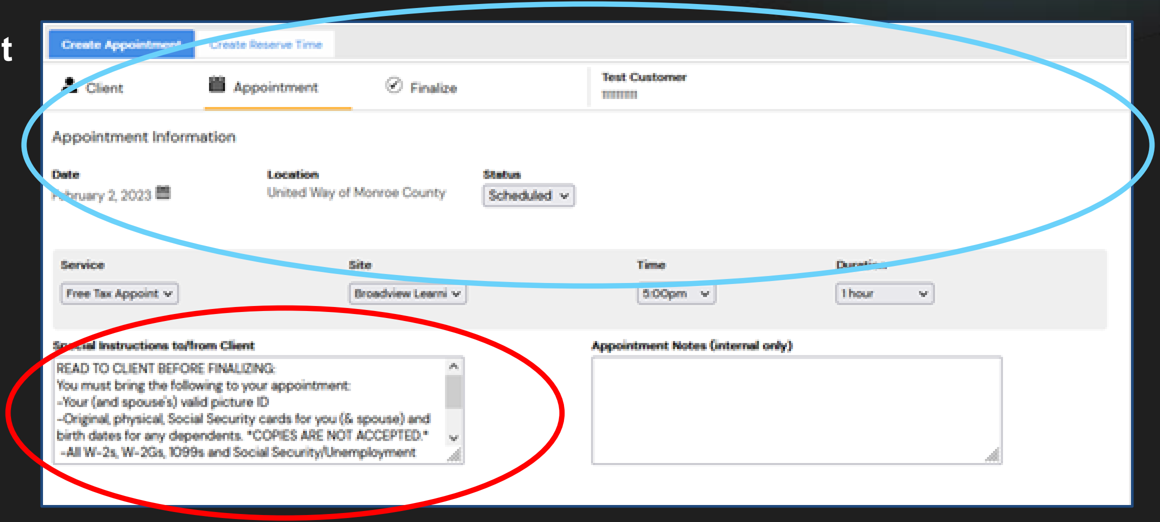
Confirm Appointment Details

1. **Review All Information with the Client**
   - Read the details on the screen to confirm this is what they want. Encourage the client to **write it down**.

2. **VERY IMPORTANT**

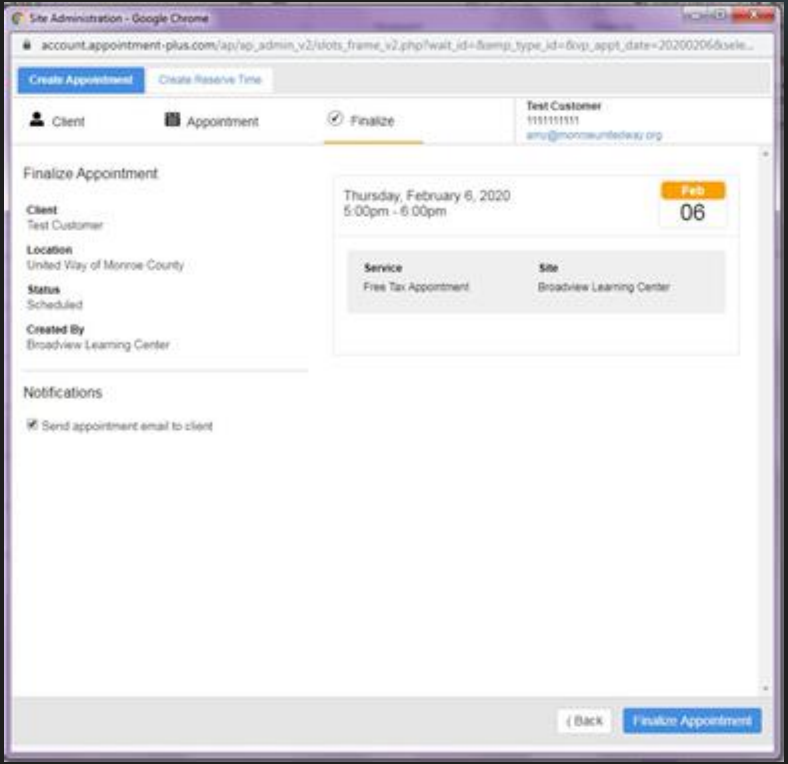
   Be sure to **read the "Special Instructions to the Client" box** aloud.

3. **When everything looks correct**
   - Click the **Next** button at the **bottom right** of the screen.



Finalize Appointment

Click the **blue "Finalize Appointment"** button located at the **bottom right** of the screen.

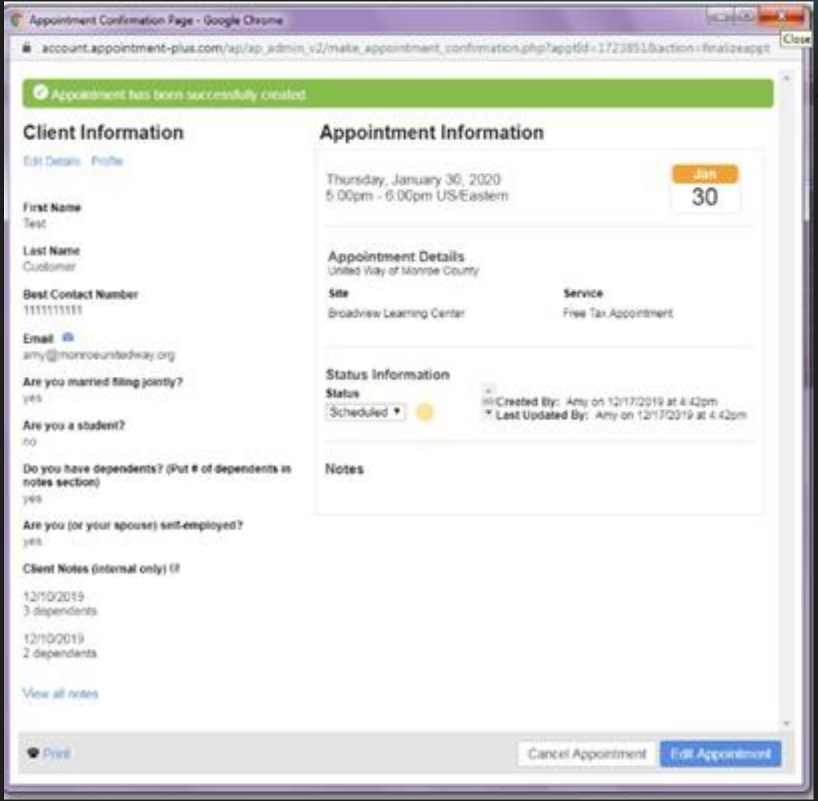


After Finalizing the Appointment

A green banner will appear at the top saying:
“Appointment was successfully created.”

- At the bottom of the screen, you’ll see options to:
  Edit the appointment
  Cancel the appointment (if needed)

- When finished, click the **red “X”** in the **top-right corner** to return to the **home dashboard**.



Canceling or Editing Appointments

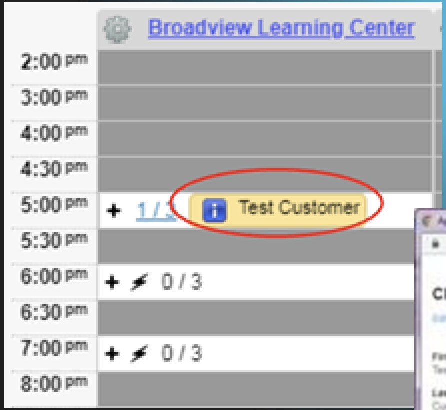
1. **Find the Client**

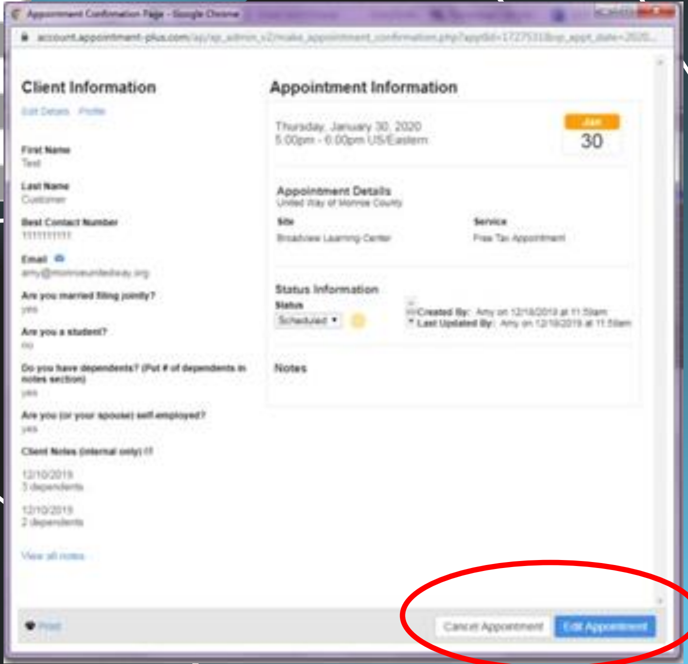
Click on the **name of the person** who needs to cancel or change their appointment.

- Their appointment will open.
- At the bottom, select **Cancel** *or* **Edit.**

1. **If Canceling**
   - Click **Cancel**, then close the window.
2. **If Editing**

   The appointment will open.
   - You can **change the date, time, or other details.**
   - Then **finish the process as you would for any appointment.**





Viewing Open Slots at Other Sites

Do NOT schedule appointments for other sites!

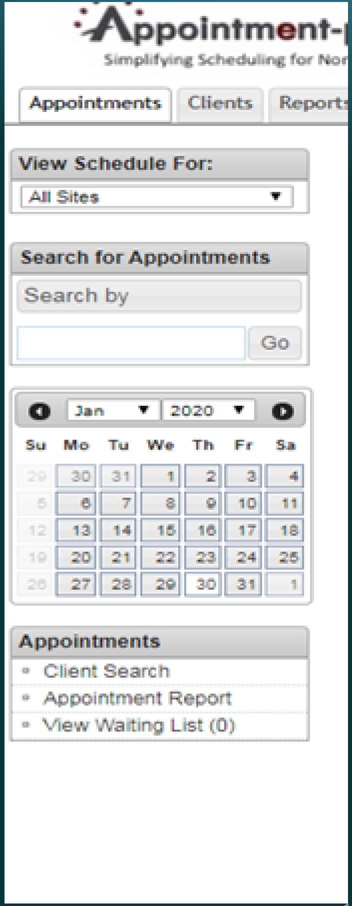
You may **view openings** and **refer clients to call the site directly**.

How to View Other Sites:

1. Click the **Appointments** tab (top left).

2. Select a **specific site** or **view all sites.**

3. Click a **day on the calendar** to see available appointments.

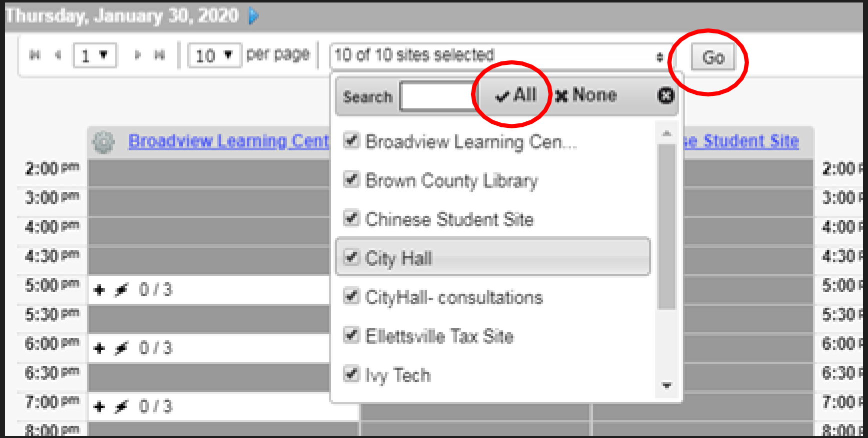


To View All Sites

1. Check the **gray bar** above the appointment slots.
   It should say: **“10 of 10 sites selected.”**

2. If it doesn’t:
   - Click the **drop-down menu**
   - Select **“All”**

     Click **Go**

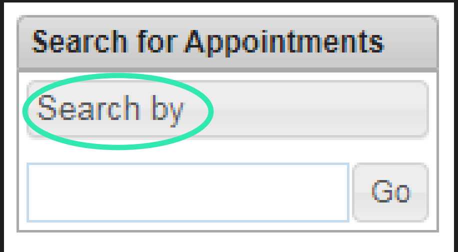


View All Appointments for a Client

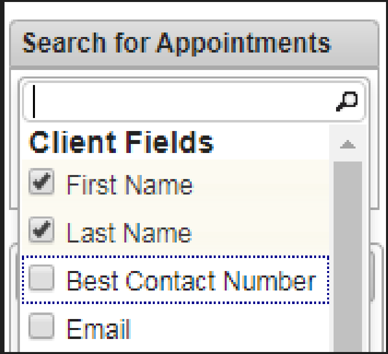
Some clients may have **appointments at multiple sites**.
To check if they already booked elsewhere:

1. Click the **Search By** bar.
2. Choose **First Name** and **Last Name**.
3. Type the **first OR last name** in the search field.
4. Click **Go**.

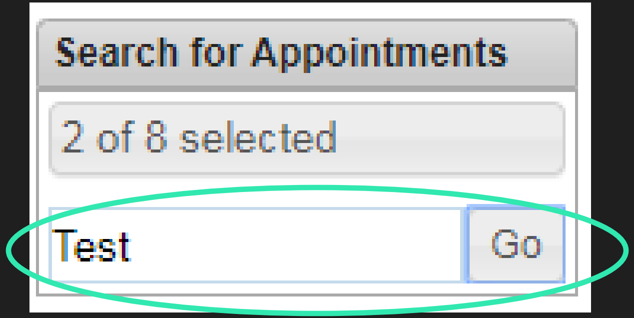
Step 1



Step 2



Step 3



Appointment Search Results

- After searching, results will appear in a list.

Click the **blue “View”** link to:

- Open appointment details
- **Cancel** or **edit** the appointment

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

Contact Information for Other Sites

All site contact details are listed on this page **in alphabetical order**.

Recommended:

Bookmark the page

Print it out

OR keep a copy of the **Free Tax Service brochure** at your desk

Questions or Issues?

Contact VITA Coordinator:

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carmen@unitedwaysci.org

812-334-8370 ext. 11