

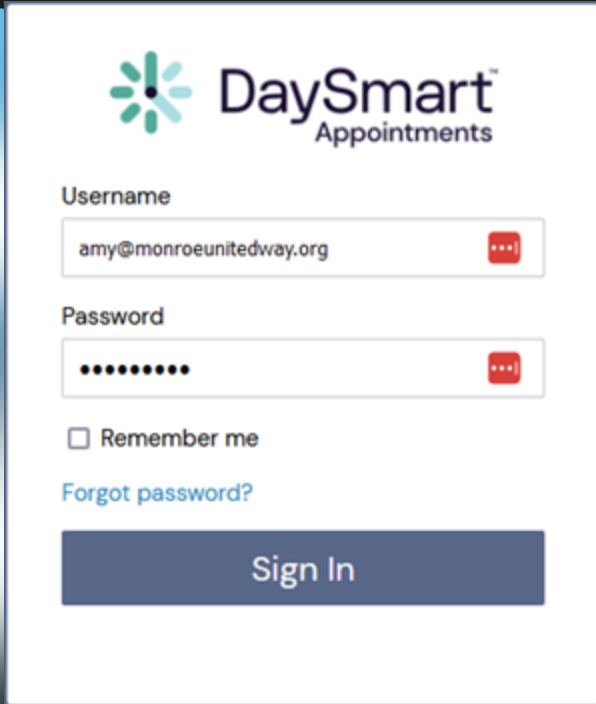


DaySmart Guide

FREE COMMUNITY TAX SERVICE SCHEDULING SOFTWARE

United Way of South Central Indiana

How to Log In to Your DaySmart Account



The image shows a login form for DaySmart Appointments. At the top is the DaySmart logo, which consists of a green stylized flower icon followed by the text "DaySmart" in a large, bold, black font and "Appointments" in a smaller, regular, black font below it. Below the logo are two input fields. The first is labeled "Username" and contains the text "amy@monroeunitedway.org". The second is labeled "Password" and contains a series of black dots. To the right of each input field is a red button with three white dots. Below the password field is a checkbox labeled "Remember me". Below that is a link that says "Forgot password?". At the bottom of the form is a large blue button with the text "Sign In" in white.

DaySmart
Appointments

Username

amy@monroeunitedway.org

Password

.....

☐ Remember me

[Forgot password?](#)

Sign In

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

The screenshot displays the Appointment-plus web application. At the top, the logo reads "Appointment-plus" with the tagline "Simplifying Scheduling for Non-Profits". Below the logo is a navigation bar with tabs: Appointments, Clients, Reports, Sites, Services, Events, Lists, Pages/Text, and Layout. The "Appointments" tab is active. On the left, a "View Schedule For:" section contains a dropdown menu labeled "All Sites" with a list of locations including Broadview Learning Center, Brown County Library, Chinese Student Site, City Hall, City Hall- consultations, Ellettsville Tax Site, Ivy Tech, Owen County Library, SCCAP, and Stone Belt. Below this is a calendar grid for January 2020. The main area shows the schedule for "Thursday, January 30, 2020". A time slot from 5:00 pm to 5:30 pm is highlighted, showing a status of "0 / 3". The "Broadview Learning Center" is selected for this view. At the bottom left, there is an "Appointments" section with links for "Client Search", "Appointment Report", and "View Waiting List (0)".

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

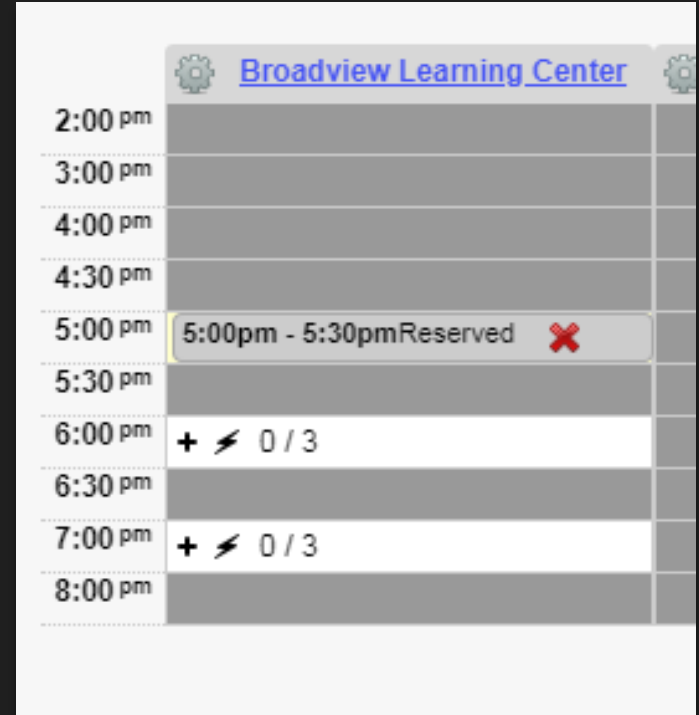
- Example: **0/3** means **all three appointment slots are open**.

If the day appears **gray**, it means the **site is closed** that day.

Quick Reserve Feature

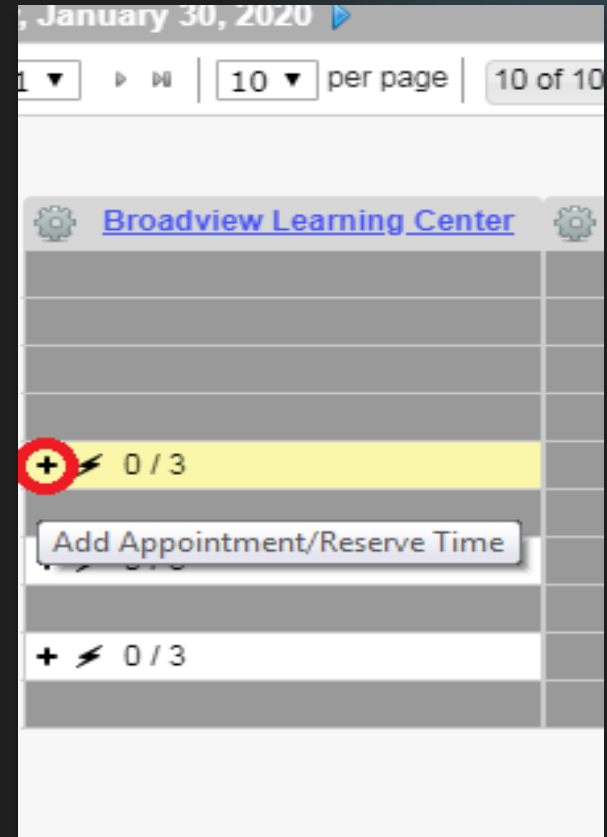
NOTE: You can quickly block off an entire appointment slot using the “**lightning bolt**” icon.

- 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**.

The screenshot displays a web form titled 'Create Appointment' with a sub-tab 'Create Reserve Time'. The form is divided into three main sections: 'Client', 'Appointment', and 'Finalize', with 'Client' currently selected. The 'Client Information' section includes a 'Client Search' box with the placeholder text 'Begin typing to search'. Below this are input fields for 'First Name *', 'Last Name *', 'Best Contact Number *', and 'Email'. To the right of these fields are four questions with radio button options: '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), and 'Are you (or your spouse) self-employed? *' (yes/no). At the bottom of the form is a large text area labeled 'Client Notes (internal only)'.

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.

The screenshot shows a web form titled 'Create Appointment' with two tabs: 'Create Appointment' (active) and 'Create Reserve Time'. The form is divided into sections: 'Appointment Information', 'Service', 'Site', 'Time', 'Duration', 'Special Instructions to/from Client', and 'Appointment Notes (internal only)'. A blue oval highlights the top section, including the 'Appointment Information' and 'Service' fields. A red oval highlights the 'Special Instructions to/from Client' section, which contains a scrollable list of instructions: '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'. The 'Appointment Notes (internal only)' section is a large text area on the right.

Create Appointment Create Reserve Time

Client Appointment Finalize Test Customer

Appointment Information

Date February 2, 2023 Location United Way of Monroe County Status Scheduled

Service Site Time Duration

Free Tax Appoint Broadview Learn 5:00pm 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)

Finalize Appointment

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

The screenshot shows a web browser window with the URL `account.appointment-plus.com/ap/ap_admin_v2/slots_frame_v2.php?wait_id=8&mp_type_id=6&v1_appt_date=20200206&sele...`. The page has three tabs: 'Create Appointment', 'Create Reserve Time', and 'Finalize'. The 'Finalize' tab is active. At the top right, it says 'Test Customer' with ID '1111111111' and email 'amr@monroeauntedway.org'. The main section is titled 'Finalize Appointment' and contains the following details:

- Client:** Test Customer
- Location:** United Way of Monroe County
- Status:** Scheduled
- Created By:** Broadview Learning Center
- Time:** Thursday, February 6, 2020, 5:00pm - 6:00pm. A yellow 'Full' badge with '06' is next to the time.
- Service:** Free Tax Appointment
- Site:** Broadview Learning Center

Below these details is a 'Notifications' section with a checked checkbox for 'Send appointment email to client'. At the bottom right, there are two buttons: a grey '(Back' button and a blue 'Finalize Appointment' button.

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**.

Appointment Confirmation Page - Google Chrome

account.appointment-plus.com/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) (f)

12/10/2019
3 dependents

12/10/2019
2 dependents

View all notes

Appointment Information

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

Appointment Details
United Way of Monroe County

Site
Broadview Learning Center

Service
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

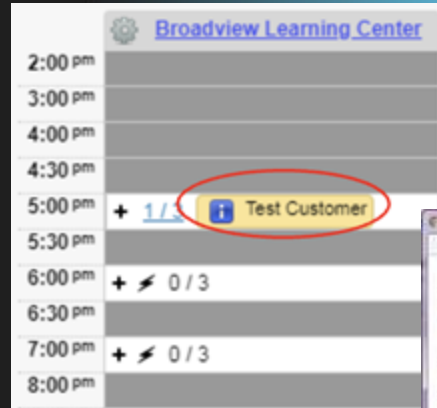
Notes

Print Cancel Appointment Edit Appointment

Canceling 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.

A screenshot of the 'Appointment Confirmation Page' in a Google Chrome browser. The page is divided into two main sections: 'Client Information' and 'Appointment Information'. The 'Client Information' section includes fields for First Name, Last Name, Best Contact Number, Email, and various yes/no questions. The 'Appointment Information' section shows the appointment date (Thursday, January 30, 2020) and time (5:00pm - 6:00pm US-Eastern). At the bottom of the page, there are two buttons: 'Cancel Appointment' and 'Edit Appointment', both of which are circled in red.

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.

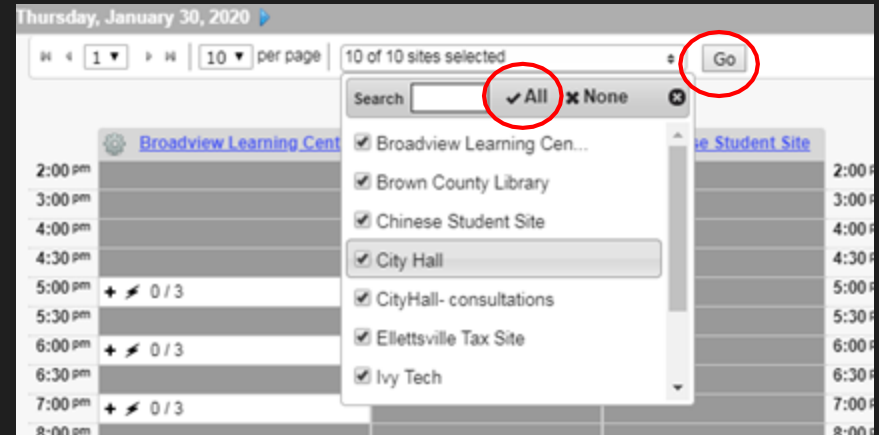
The screenshot shows the Appointment-ly web interface. At the top, there's a navigation bar with 'Appointments', 'Clients', and 'Reports' tabs. Below this, there's a 'View Schedule For:' section with a dropdown menu set to 'All Sites'. Underneath is a 'Search for Appointments' section with a 'Search by' input field and a 'Go' button. The main part of the interface is a calendar for January 2020, showing days from Sunday to Saturday. At the bottom, there's an 'Appointments' section with a list of options: 'Client Search', 'Appointment Report', and 'View Waiting List (0)'.

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**



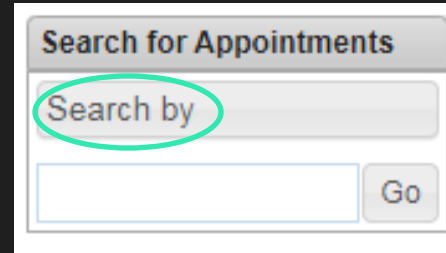
View All Appointments for a Client

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

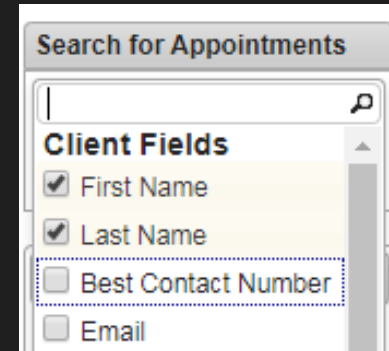


Search for Appointments

Search by

Go

Step 2

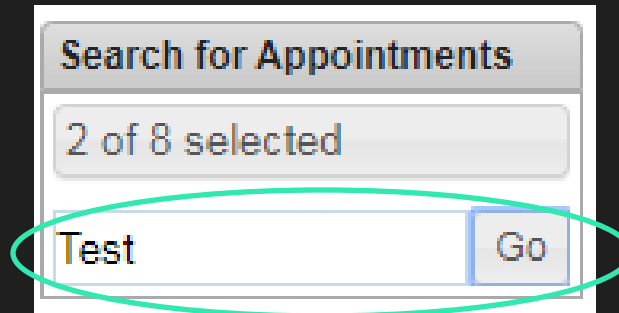


Search for Appointments

Client Fields

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

Step 3



Search for Appointments

2 of 8 selected

Test

Go

Appointment Search Results

- 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

Previous1Next

	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

Previous1Next

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:

Carmen Chamorro Aviles



carmen@unitedwaysci.org



812-334-8370 ext. 11