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**Client Service Flow**

### Search and Access

| Client can search for free in-person or online tax assistance by visiting [www.myfreetaxes.org](http://www.myfreetaxes.org), a site organization's website, or by calling 2-1-1 | Client learns about appointment scheduling service through a partner VITA site or other community entity or online |

### Appointment Scheduling

| Client enters zip code, preferences and searches map to find sites available nearby | In this process they will (1) view eligibility screening questions (2) select a date & time (3) create an account and (4) confirm their appointment | Sites that are taking appointments are displayed as so, then client can create an appointment online. |

### Appointment Confirmation

| Client receives confirmation e-mail and reminder e-mail. Appointment shows up in site admin's slot report | Client can reschedule appointment by accessing site again and going through service flow |
Login
Go to the following URL to login and enter your user name and password.

https://uwca.riverstar.com/rsDesktop/WWGPage?WWGSessionIdx=1&WWGThreadIdx=1&WWGSubmitCounter=1

Note: Your username is your e-mail

Select the 1. Scheduler accordion and you will see the (A) Tax Scheduling, (B) Search options. These will be discussed starting with the Tax Scheduling and working down from there.

1. Scheduler 2. Accordion Options
**Tax Scheduling**

**Schedule a New Appointment**

The following screen is used to schedule a new appointment for a client. Click the “Schedule a new appointment” option and click next.

In the following screen, enter the client’s zip code where they would like to schedule an appointment. Click “Lookup” to populate and confirm the county.
Confirm the correct county and click next to proceed.

Next, a screen will appear with questions or a text script to review with client and determine eligibility. Follow the text or questions with client. Click next when you have determined that client qualifies for services, or back to return to previous screen.
When you click next, a tax site search screen will appear. You may filter for:

Language

Location

Date – Select a date if a client knows what date they are interested

Zip Code

Certification – Based on determination of eligibility, you may search for sites who have volunteers certified in basic or advance preparation of taxes.

Time of Day – select one of the options.

Day of Week

If you would like see ALL appointments available, select “Reset All Filters” and then “Apply Filters and Find Slots”

When you select “Apply Filter and Find Slots” available appointments will populate. If any filter options are unavailable, they will display with a red strikethrough in text.
Ask the client for their e-mail or phone number.
If the client has made any previous appointments, or created a profile online or through a call agent, their information will pre-populate. The call agent should confirm information is correct and/or populate information needed. Only e-mail is necessary.
Scroll down to bottom of screen. If client would like to reschedule, cancel, or make an appointment click the appropriate button, otherwise, you can close the screen. The appointment has been confirmed and client should receive an e-mail.
**Reschedule an Existing Appointment**

Open tax scheduling and select “reschedule and existing appointment”

<table>
<thead>
<tr>
<th>Location Name</th>
<th>Location Phone</th>
<th>Location Address1</th>
<th>Location Address 2</th>
<th>Location City</th>
<th>Date</th>
<th>Time</th>
<th>reschedule</th>
<th>cancel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Testing (CSD)</td>
<td>9165767191</td>
<td>2389 Gateway Oaks Drive</td>
<td>Suite 100</td>
<td>Sacramento</td>
<td>Tue 1/17/2017</td>
<td>04:00 PM</td>
<td>reschedule</td>
<td>cancel</td>
</tr>
<tr>
<td>Goodwill Industries Redwood</td>
<td>651 Yolanda</td>
<td>Santa Rosa</td>
<td>Sat 2/4/2017</td>
<td>09:00 AM</td>
<td>reschedule</td>
<td>cancel</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Tax Scheduling

- Language: ALL
- Location: ALL
- Date: 
- Zip: 
- Certification: Basic
- Day of week: Monday
- Time of day: 07:00 AM - 11:59 AM (Morning)

Next
Cancel an Existing Appointment

Your appointment has been cancelled.

Please confirm you would like to cancel your appointment on Sat 2/4/2017 at 09:00 AM.
Are you sure you would not like to reschedule your appointment for another time?  

Why would you like to cancel the appointment?

- No longer interested
- Walked into a session already
- Can't reschedule now
- Found someone to handle this for me
- Other

If other, please provide additional information.

Note that if you want to exit this screen, you must click cancel and then close on the same screen.
Search

You may use the search feature to search for existing appointments.

Enter a name, phone number or confirmation number and click Search.

First Name:  
Last Name:  
Confirmation Number:  
Phone:  

Name  Confirmation Number  Location  Date  Time

Name  Confirmation Number  Location  Date  Time

Nalleli Sandoval  51989  Goodwill Industries Redwood  Sat 2/4/2017  09:00 AM
**Appointment Confirmation**

For any client who creates an appointment, the system automatically sends a confirmation e-mail or text, depending on the clients selection.

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**Your tax appointment**

EITC4me

Nalleli Sandoval,

Please confirm your VITA tax preparation appointment at this location by clicking on the link below.

It will be on Wed. Jan 25 at 09:00 AM.

Your confirmation number is: 45431

If you are not able to attend, you must cancel your appointment at least 24 hours in advance or you won’t be able to reschedule your appointment.

In order to prepare your return:

- BOTH spouses MUST be present for a joint return.