Appointment System

User Manual

December 12, 2018

This appointment system was developed by AARP Foundation Tax-Aide volunteers from Colorado to replace various paper or spreadsheet type systems. It provides a convenient platform for managing appointments for individual sites, coordination of scheduling across multiple sites, or a central scheduling point for many sites. New sites and users can be added by any Appointment Manager and users can be assigned either viewing or scheduling permissions at their own or multiple sites as desired. Sites can optionally allow internet access to taxpayers for scheduling their own appointments or add themselves to a callback list for subsequent scheduling.

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Scheduling

Views

Each view has a menu line, a view selection box, a site list, a calendar, and an appointment area.

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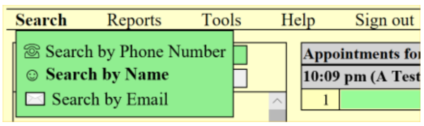
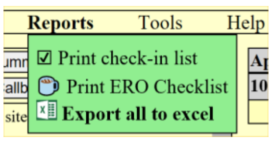
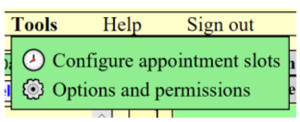
Menu Line



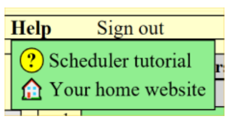
The search menu allows you to find a scheduled taxpayer by phone number, name, or email.



The reports menu provides a variety of reports. The check-in list and ERO checklist are only available when in the daily view. Export to excel is only available if you have permission to make appointments.



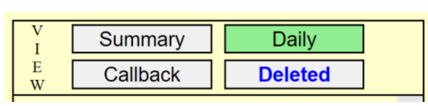
The Tools menu is used to set up appointments and to set up options for the site and user permissions. This is only available to Appointment Managers.



The Help menu takes you to this document or to a website for your home site if one has been set up by your Appointment Manager. It's a great place to put specific procedural instructions for your site.

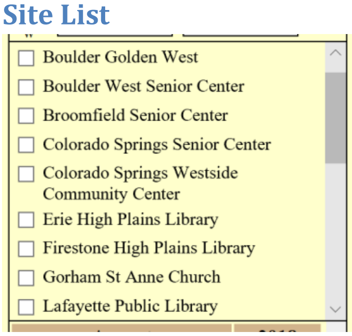
View Selection

There are five different views that differ in the Appointment area. The desired view is selected by



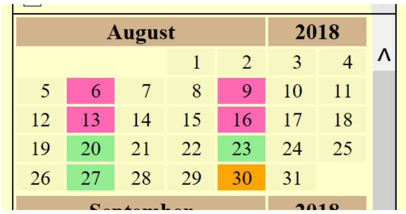
buttons which indicate the current view with a green color or views that are not accessible (perhaps when moving an appointment) with a red color. Additionally, the text in the "Callback" or "Deleted" view buttons will have blue text if a taxpayer has added or removed their name via internet scheduling.

Site List



The site list section shows the sites available for scheduling. For each box checked, the appointments related to that site will be shown in the appointment area of the view. To check multiple boxes, hold the PC Ctrl key down as you click each box (check or uncheck). When you release the Ctrl key, the view will refresh to the new configuration. The list may be shortened as needed to allow the calendar to show a full three months.

Calendar

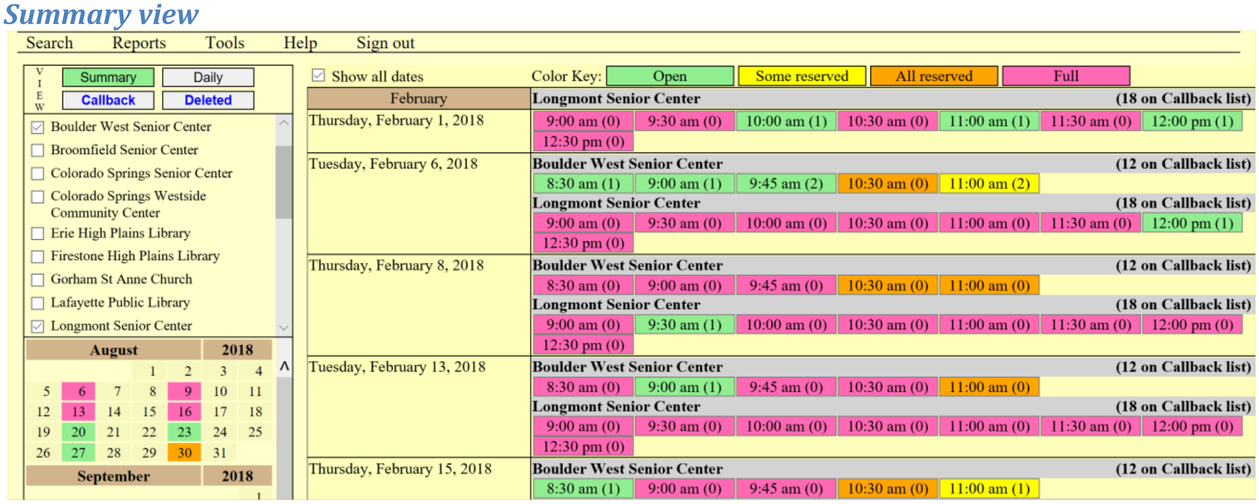


The calendar shows the availability of appointments for each date. Green indicates that appointments are available; red indicates all appointments are filled or is a date prior to the current date; orange indicates that all appointment times for that date have been reserved (more on that later). If the date number is shown in blue, an appointment on that date has been made by a taxpayer using internet access and you may wish to follow up with a phone or email contact. Hover over the date to see how many appointments are available on that day and how many are reserved. Click on the date and you will jump to the daily view for that date.

Appointment area

The appointment area lists the times available for scheduling or names that are on the callback or deleted list. The details vary with the view.

Summary view



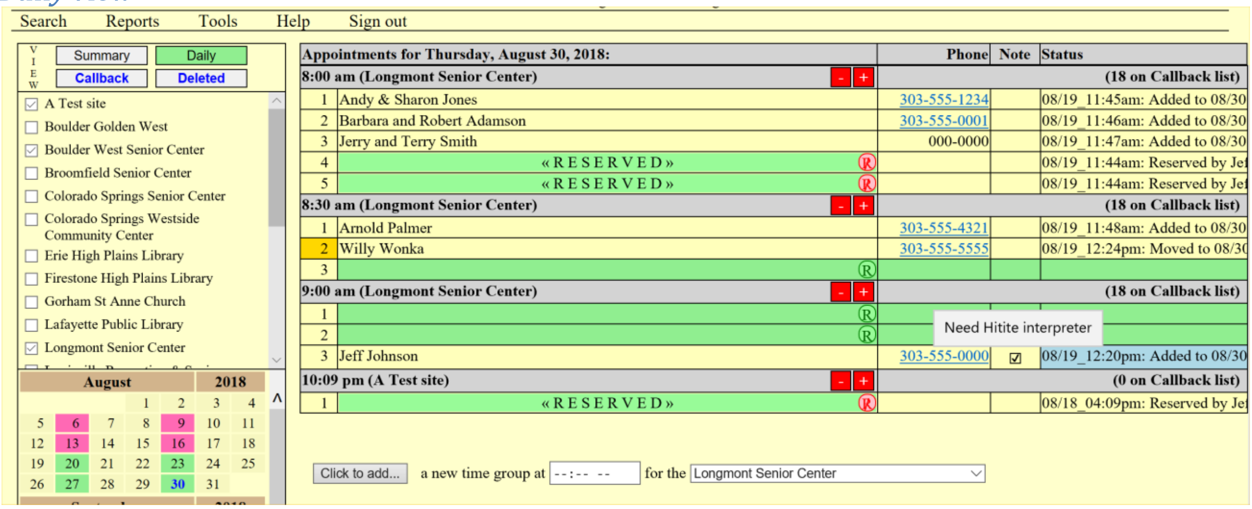
The Summary view shows the status of all appointments, listed by date and time. For each date there are time boxes, the color of which indicates the availability of appointments and whether some appointment slots are reserved. The number in parentheses in the time box indicates the number of appointments available for scheduling and may or may not include reserved slots.

Normally, only dates starting with the current date are shown but there is a checkbox above the first date titled “Show all dates” that allows showing earlier dates to view the past history. Use the site checkboxes to indicate the appointment slots for which sites you wish to see.

Click on the time box to bring up the appointment registration form.

Click on the date box or the date on the calendar to move directly to the Daily view.

Daily view



Clicking on the Daily view button will open to the date with the first available appointment slot.

The Daily view shows the details of the time slots available for the sites checked in the site list for that date, listed in time order. Available appointments are highlighted in green (either RESERVED or not). Clicking on an available appointment will allow assigning that appointment using a scheduling form (described later). Clicking on an assigned appointment will allow changes to the scheduling form or moving the appointment to a different location, time or date or deleting the appointment.

The name column is free-format. Whether you use first- or last-name first is a site procedure decision. Click on the circled “R” to make an idle slot reserved or unreserved.

The phone number is forced to be 7- or 10-digits with an optional 1- and is required. Alternate phone numbers could go in the Note column. The link shown in the example is a function of your browser. If the system you’re using has the capability, clicking on that link will open a phone function and you can use that to call the taxpayer (not on most PCs, but possibly on a tablet or for sure, a cell phone).

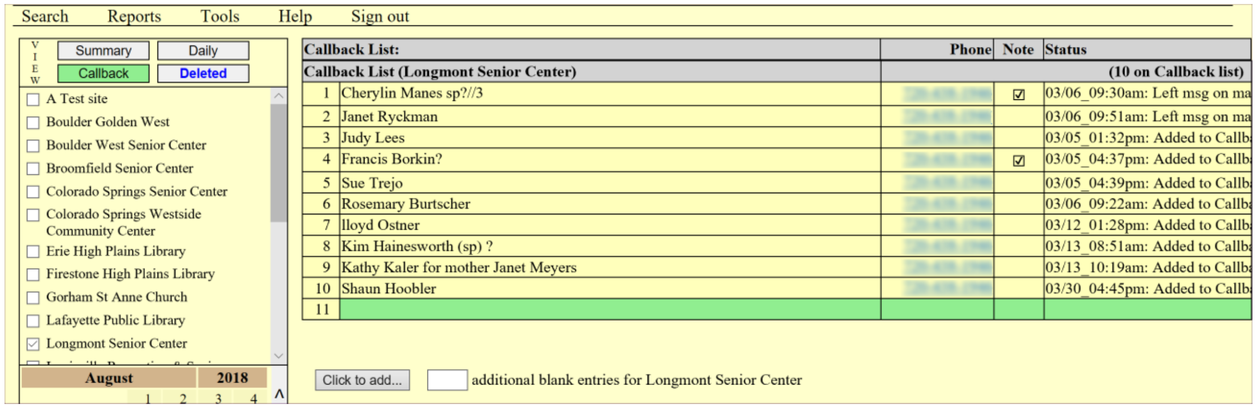
If the Note column has a checked box in it, there is a note in the scheduling form and hovering the mouse over the box will display that notes. The note will print out on the check-in list.

The Status column shows the most recent action taken on behalf of the taxpayer with date, time, action taken and who took that action – a good reason for each Scheduler to have their own personal login. To see the entire text of the latest action, hover the mouse over that cell in the table. If the Status cell has a blue background, it indicates that the taxpayer has made the entry via the internet and you may wish to follow up to verify their need to file or if they have any scope issues. Once such a contact or other action is made, the blue background goes away.

If you move a taxpayer to a new time and date (as with Willie Wonka above), the appointment number is highlighted in gold to make that move easy to identify to help you assure that the move was successful. When the view is changed, that highlight goes away.

For Appointment Managers only, the red minus(-) and plus(+) boxes are quick ways to add or remove empty slots to that time period without using the Configurator. It will not remove a slot that is being used nor one that has been RESERVED. Also, at the bottom of the list of appointments is an option to allow adding a time group to that date for any site for which you have Appointment Manager permissions.

Callback list



The Callback list is similar to the Daily view and shows all taxpayers that are awaiting appointments after a phone (or personal or email) contact. Each site selected on the site list will have its callback list shown. Clicking on a name will allow changes to the client information on the appointment form, moving to an assigned appointment or deleting then taxpayer's entry.

The bottom "Click to add…" option is rarely used since after entering a taxpayer name in the green line at the end of the list, a new green line is automatically added. The option is for the rare case when in using an answering machine that forces one to get the most recent messages first, you can explicitly add the number of expected messages as "Reserved for #1" through "Reserved for #n" entries and use them to enter the answering machine messages in reverse order. The option is available to Schedulers.

As with the Daily view, blue highlighting on the Status column means that a taxpayer has entered their name on the Callback list via the internet. And, when a person is moved from an appointment or from the Deleted list, their number entry in the Callback list is highlighted in gold so that they are easier to find if need be.

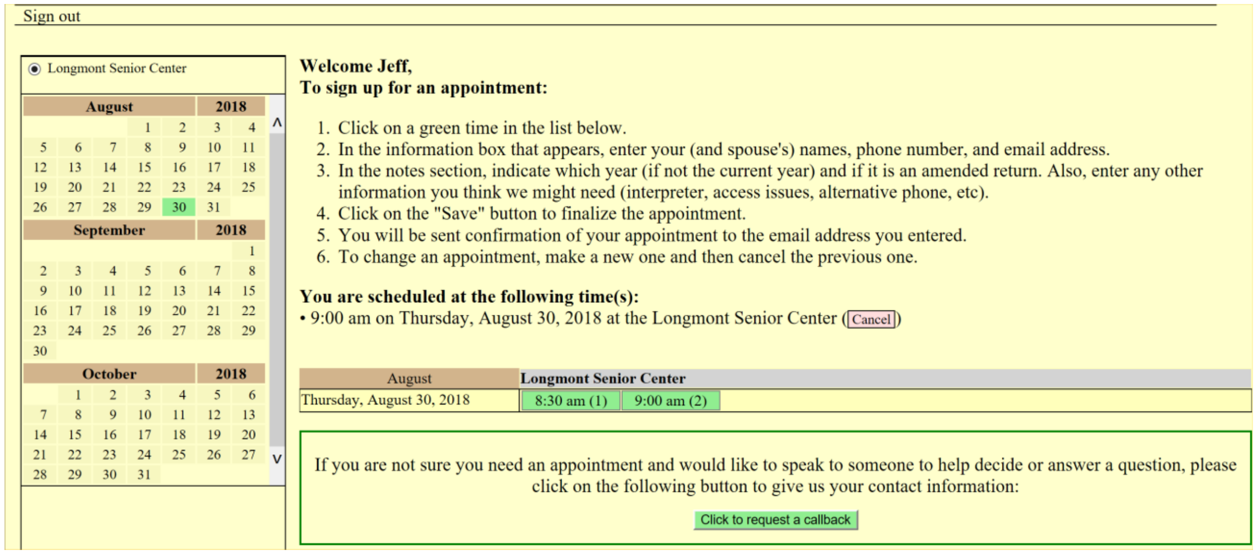
Deleted list

the Deleted list is identical to the Callback list without the "Click to add…" option.

Names on the Deleted list cannot be removed until the Appointment Manager specifically removes all data, including appointments from the site in preparation for the next season. This preserves the history for the taxpayers' actions in the event of questions or the need to review actions taken by Schedulers for a particular taxpayer.

Taxpayers can be moved back to the Callback list or to a scheduled appointment from the Deleted list.

User view



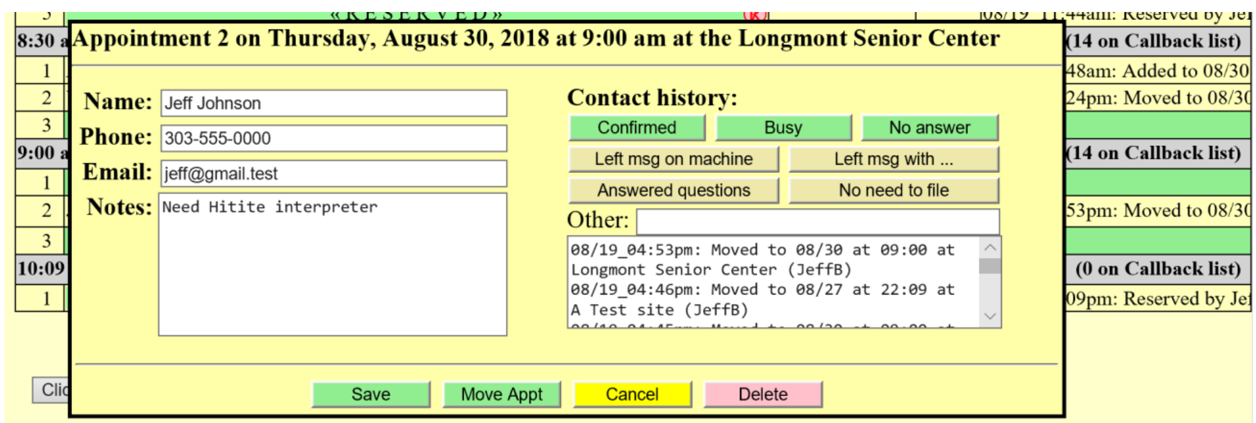
the User view is similar to the Summary view and lists all sites open for internet scheduling but only one site can be selected at a time. it only shows open schedule dates and times, and allows adding themselves to the callback list. This view is not available to the Scheduler and the taxpayer does not have access to other views.

How to…

add an appointment:

From the Summary View, click on a green- or yellow-highlighted time box to bring up the appointment form. If the Appointment Manager allows the option to schedule RESERVED slots from this view, you can also click on the orange-highlighted time box. If not allowed in this view, you will have to go to the daily view by clicking on the date box or calendar day to use them. Empty, non-RESERVED, slots will always be chosen first.

From the Daily View, click anywhere on any green line, RESERVED or not, and the appointment form will appear.



As a minimum, enter the client name(s) and phone number in the pop-up box and click "Save". An entry will be automatically added to the Contact history section.

If you enter an email address, an email will be sent to the taxpayer when you schedule or move the appointment if set up by the Appointment Manager to do so. If a taxpayer makes their own appointment from the internet, the email address is required and thus will also result in the confirmation email.

If the client has a special need, enter it directly in the "Notes" box. This is a good place to indicate any physical or mental challenges, interpreter needs, additional contact information, explanation of tax issues or questions, etc.

The "Notes" box information will also print as a footnote on the check-in sheet.

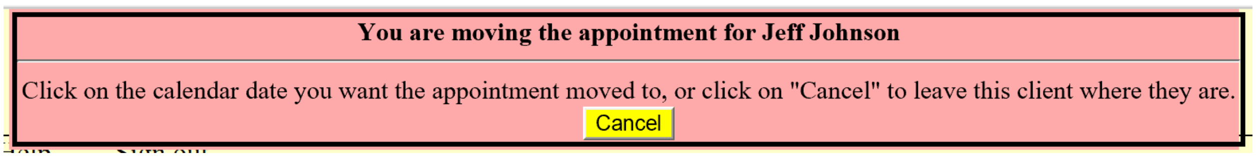
Whenever you contact the taxpayer, add a new entry in the "Status" area to indicate the action. The most common entries have their own button. If you need some other statement, just enter it in the “Other” box and it will be added when you exit the box – no need to add the time stamp or your name.

If you have done this from the Summary view, after you click "Save", you will automatically move to the daily view and the entry you made will have a highlighted number in the first row to help you find it to verify that it did what you expected.

If more than one person is making appointments at the same time, there is a chance that you both will choose the same time slot. If that happens, the first one to click “Save” will get the time slot and the other will get a message to try a different time.

move an appointment:

From the Daily view, click on the current appointment line and chose "Move Appt". This will open a box that indicates that you are moving an appointment:



Click on the desired new calendar date, the Summary view button, Daily view button, or Callback list button, find a new empty slot and click on it. That’s all there is to it. Again, the new entry will have the slot number highlighted so you can easily find it to verify that the move worked as expected.

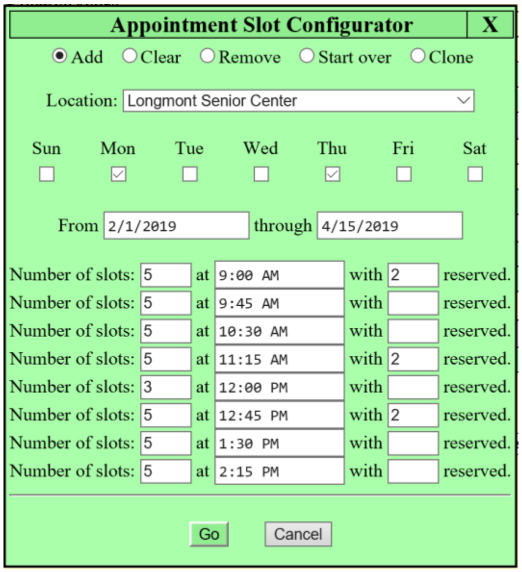
When you move the appointment, an entry will automatically be added to the History list and a new email will be sent to the taxpayer confirming the new appointment if they have an email address in their record and the Appointment Manager has opted to have emails sent.

delete an appointment:

You can’t actually delete an appointment entirely. To move an appointment to the Deleted list, simply click on the “Delete” button and it will make that change and record the action in the History list. That taxpayer can always be re-scheduled or added to the Callback list if needed.

Configuring appointments

From the Tools menu, select “Configure appointment slots” to open the configurator window.



To configure your appointments, select “Add”, your site Location name, the days of the week you will be working and the date range. Enter the number of slots at each time group and if any should be RESERVED.

Click “Go” and you’re done!

The purpose of making some slots RESERVED can serve several purposes:

- They can never be selected by taxpayers who self-register from the internet.
- They can give some flexibility in scheduling to “see how things go” particularly at the beginning or end of the day or around lunch time.
- They can be used to assign times for taxpayers that have significant work remaining when they must return.

If different work days have different schedules, the Add option can be used multiple times and if duplicate times are encountered, it will add the specified number of slots to those as expected.

If you use your real schedule for training, you can use the “Clear” option to remove names from you schedule so that you can start fresh with real taxpayers. *You never want to use this option during the working season.*

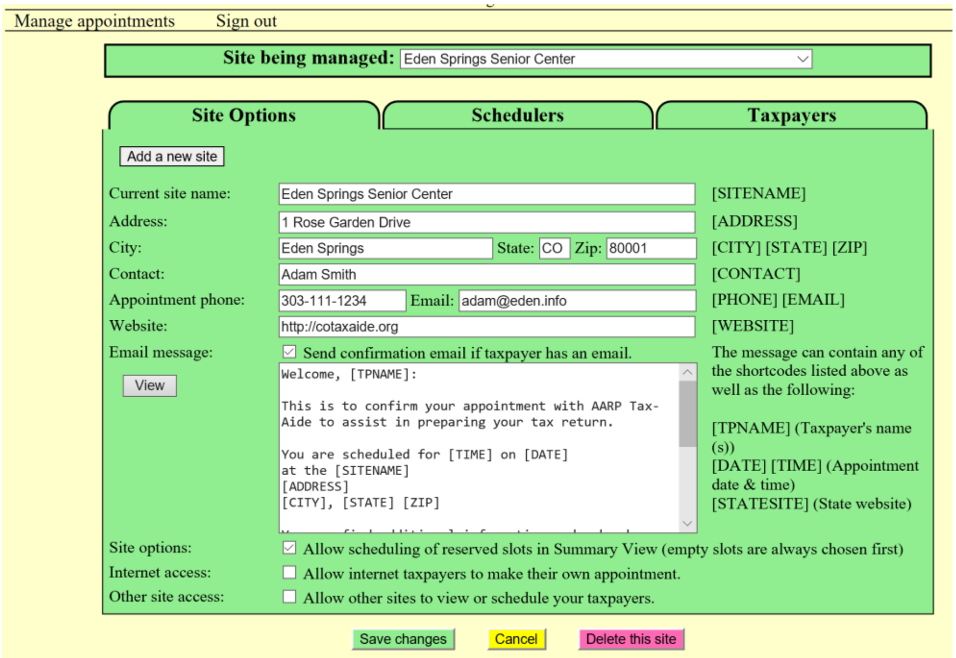
If you mistakenly created too many time slots for a date or time, you can use the “Remove” option to remove them. This option will not remove any slot with a name entry, including RESERVED. This makes it safe to use during the working season.

The “Start over” option is the preferred way to totally clean out your appointment schedule and will also clear the Deleted list. With this option, the only entry presented will be the site name. You may wish to export your data to excel before using this option and you certainly will not want to use it during the working season.

The “Clone” option may or may not prove useful. If you were completely happy with the previous year’s schedule, put in the new year’s date range and it will attempt to duplicate what was set up the previous year. Check especially the first and last dates and holidays carefully because there may not have been an equivalent schedule for those days the previous year due to the way the calendar dates shift. RESERVED slots are not preserved as such but created as normal non-RESERVED slots. Needed adjustments can always be made from the Daily view. This option will also clear the Deleted list and all data prior to your new starting date.

Options and Permissions

Site options and user permissions use the Site and User Administration screen accessed from the Tools menu or from the login window. This is only available to the site's Appointment Manager. There are three tabs on the screen:



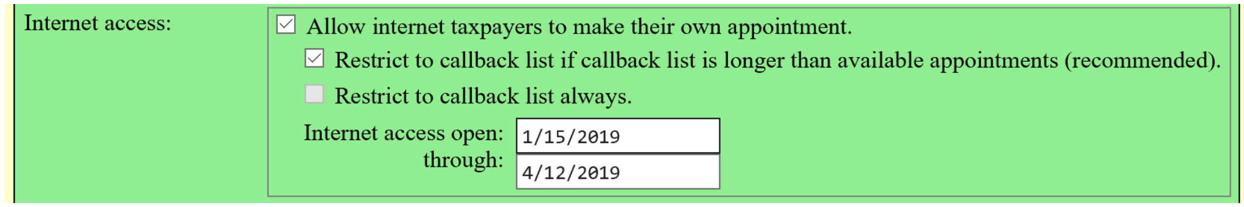
The Site Options tab lists all the options available to the site. All but the site name is optional but the site address, appointment phone and email is important if you will be sending emails as confirmation (the default).

The email message can be edited as desired and the [shortcodes] will be replaced with the corresponding real information when the email is sent. To revert back to the default message, simply delete the entire message. Emails are sent when an appointment has been made for a taxpayer or moved to a different appointment slot if the taxpayer has an email. Taxpayers scheduling themselves over the internet are required to have an email address. You can disable this feature if you wish by un-checking the associated checkbox. Click the view button to see what it will look like.

The option to "Allow scheduling of reserved slots in Summary View" is checked by default. You may wish to uncheck this option if you do not want Schedulers to use RESERVED slots. The original intent of RESERVED slots is to limit the number of appointments that an internet taxpayer can schedule in any particular time period so that they can be used by your own Schedulers. In the Summary view, non-RESERVED slots are always chosen first. If this option box is checked, RESERVED slots are then chosen after all others have been used. If not checked, the Scheduler will have to go to the Daily view to select and use the RESERVED slots so that their use is deliberate.

We recommend that you <u>do not</u> check this box if you are allowing internet taxpayers to schedule their own appointments and you wish to limit the number of slots available to internet taxpayers.

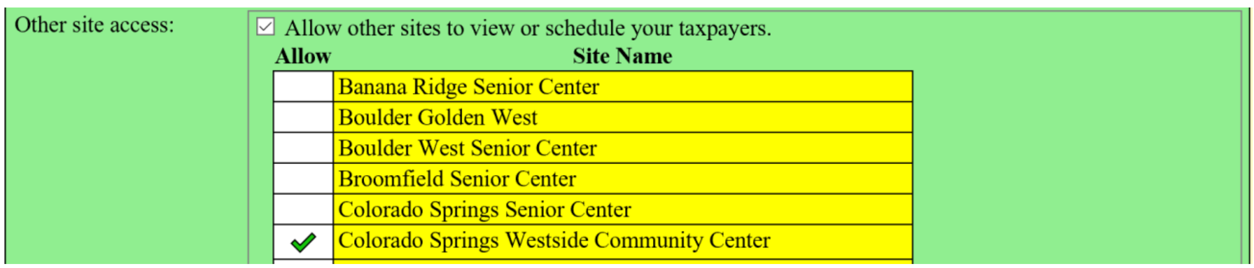
Internet access
Checking the "Internet access" box produces some additional options:



You can restrict internet users from only adding their name to the Callback list always, or only if the Callback list exceeds the number of available appointments, or no restriction at all.

You set the dates when internet access is open for scheduling. This causes your site to be listed on the sign-in window and if the current date is earlier than the opening date, the opening date will tell the taxpayer when to come back and try again.

Shared access with other sites
If you are cooperating with other sites in the appointment process, check the "Other Site Access" box. A listing of all of the sites sharing the appointment system will be listed:



Click on the associated "Allow" box to give another site the ability to schedule appointments or to see the availability (Summary view only) of appointments at your site. This brings up the list of all schedulers in that site to be displayed in your Schedulers tab. Then, in your Schedulers tab, you can assign permissions on an individual basis. This does not affect their permissions on their home site.

Add a new site
You can add a new site by clicking the "Add a new site" button on the top left corner of this tab. It will open a new version of this same tab into which you will enter the name of the new site and its respective information. Please always name the site beginning with the city name.

Why add a new site?

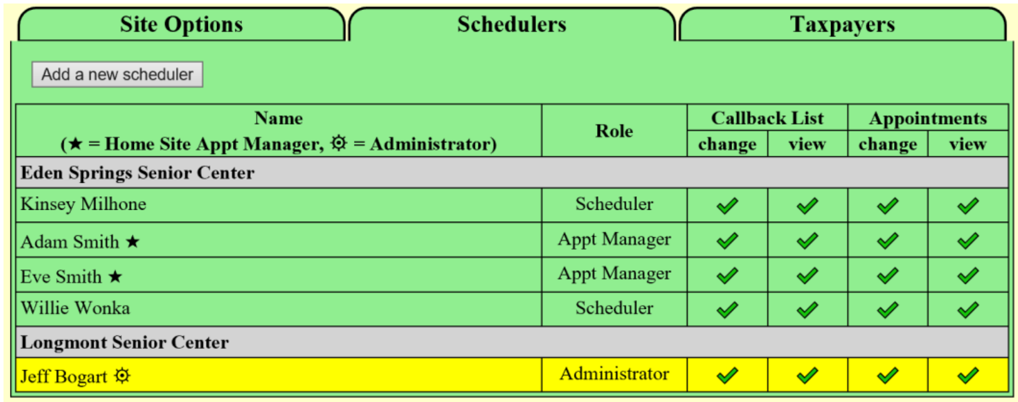
- You have one or more ad-hoc sites
- You want to set up a virtual site to schedule taxpayers who must return to finish their returns
- To add a new site in your District who wants to use the system (yes, you can do that)
- Other reasons I haven't thought of yet.

When you add the new site, the "Schedule" box will automatically be checked next to the "Other site access" giving your home site permission to schedule on the new site and you become the Appointment Manager for that site as well as your own site.

The new site will also appear in the drop-down list above the tabs so that you can easily switch back and forth between your own site and the new one.

Schedulers and permissions

The Schedulers tab assigns the permissions to each individual who will be working in the appointment system.



Name (★ = Home Site Appt Manager, ⚙ = Administrator)	Role	Callback List change	Callback List view	Appointments change	Appointments view
Eden Springs Senior Center					
Kinsey Milhone	Scheduler	✔	✔	✔	✔
Adam Smith ★	Appt Manager	✔	✔	✔	✔
Eve Smith ★	Appt Manager	✔	✔	✔	✔
Willie Wonka	Scheduler	✔	✔	✔	✔
Longmont Senior Center					
Jeff Bogart ⚙	Administrator	✔	✔	✔	✔

It lists the Schedulers who have a home at any site to which you have given access in the Site Options tab. Your own current site is shaded in green and other sites are in yellow to aid in knowing which site you are currently administering if there are several to choose from (like the new one added in the Site Options tab). All Administrators are also listed.

Change permissions

The defined "Roles" are:

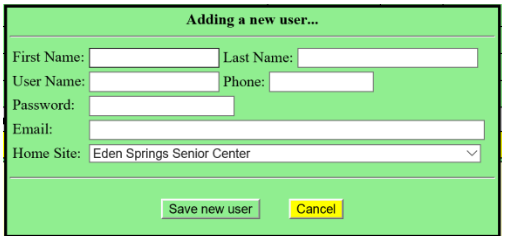
- Administrator – only an Administrator can assign Administrator permissions. They have access to all sites and schedules and can modify everything including the messages on the login window.
- Appt Manager – always has all permissions for the current site, can access the Tools menu and other configuration options in the appointment screens.
- Scheduler – can be configured to only view appointments (access only to the Summary view) or make/change appointments. Can also be configured to only have access to view or modify the Callback list. Perhaps you want your District Coordinator or a neighboring site to be able to just view the state of your site. Click on the appropriate box to add or remove the check mark.
- None – available for keeping a person on the list but disabling their permissions on a temporary basis.

Change the "Role" by clicking on the person's Role box and then select the Role you wish them to have. You can change the Role and various permissions for persons in other sites as well. You cannot change the Role or permissions for any Administrator.

Changing roles or permissions on this page is done without the need for a Save change button.

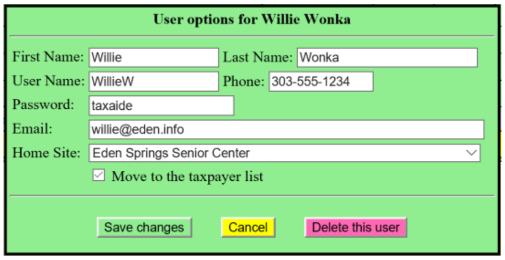
Add a new scheduler

Click on the “Add a new scheduler” button on the top left of this tab. The scheduler information box will appear:



Enter the information requested and click Save new user.

You can assign a password if you wish or if you leave it blank, a random password will be generated and e-mailed to the new scheduler.



Once added, click on the scheduler’s name to bring up a similar box which can then be edited as information changes.

One new checkbox near the bottom is to Move to the taxpayer list (next tab to be discussed). Check this if the Scheduler will no longer be active but wishes to retain their login access to make their own appointment on the internet. They will only, of course, be able to make a reservation for sites who have that option enabled.

You can also change a person’s home site. You might do this if your ad-hoc site that you added spins off to be a full-status site and the person will be registered with them as part of that process.

Taxpayers list

The Taxpayer tab lists all taxpayers who have logged in and made appointments at your site:

Site Options | Schedulers | Taxpayers

▽ Name ▼	Phone ▽	Email ▽	Last Used ▽	Delete?
Jason Bourne	303-555-0007	007@cia.xgov	8/2018	Delete
Cain Smith	303-111-1234	cain@eden.info	8/2018	Delete

You can sort the list using the inverted triangles in the header of the table. In the Name column, the left triangle sorts by first name and the right triangle sorts by last name.

Click on the name to open their information box.

If you know that this taxpayer only came to your site because they couldn’t get an appointment at another site, you can change their Home Site appropriately.

If you recruit this person to work at your site, you can move them to the scheduler list with the checkbox near the bottom. You will then have to go to the Scheduler tab and assign their Role and permissions.

As time goes on, this list may become quite lengthy so you may want to sort by “Last Used” date and delete those who haven’t logged in for a couple of years.