



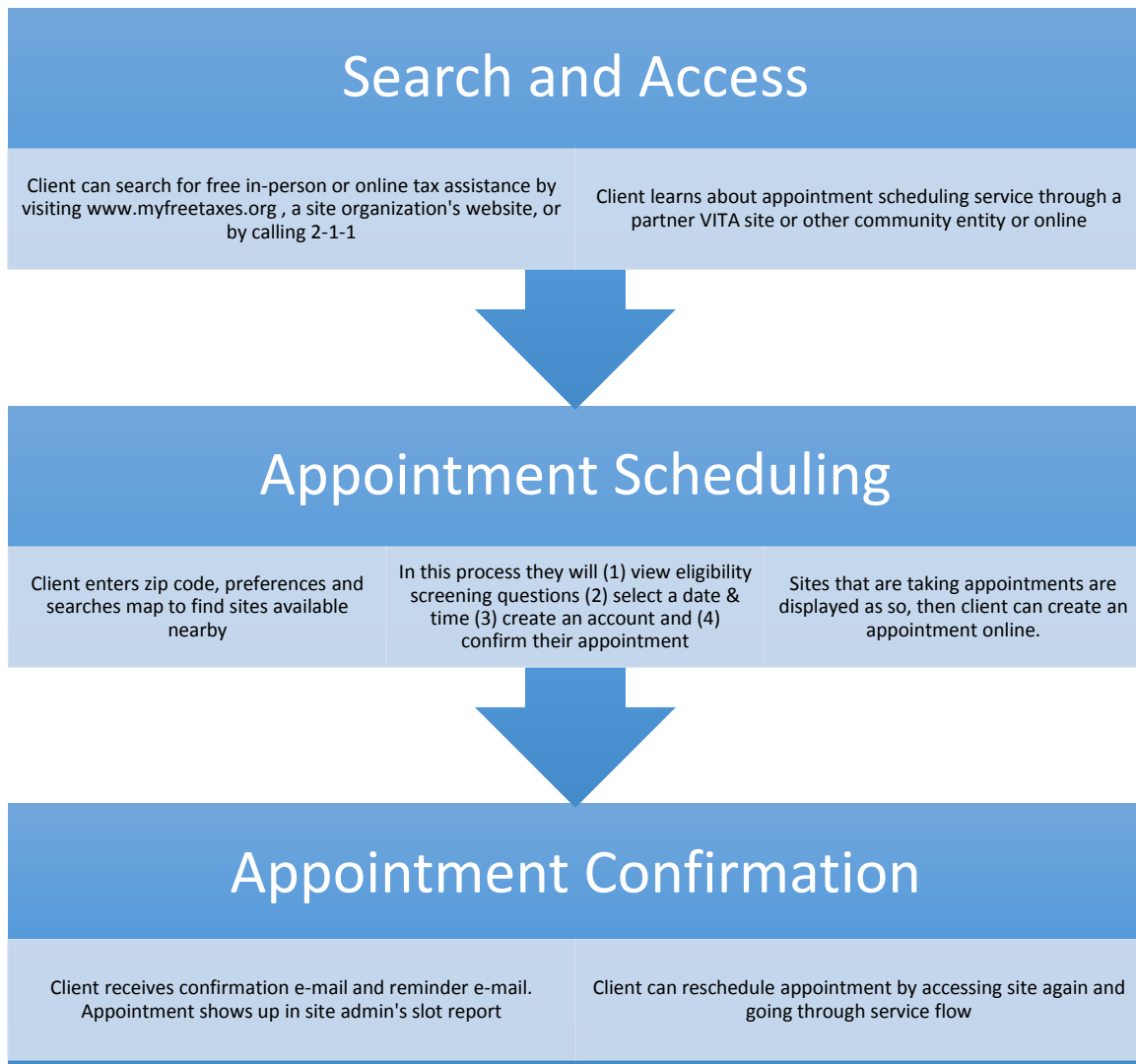
# VITA APPOINTMENT SCHEDULING SYSTEM

Call Agent User Guide

## Table of Contents

<b>Client Service Flow .....</b>	<b>3</b>
<b>Login .....</b>	<b>4</b>
<b>Tax Scheduling .....</b>	<b>5</b>
<b>Appointment Confirmation.....</b>	<b>14</b>

## Client Service Flow

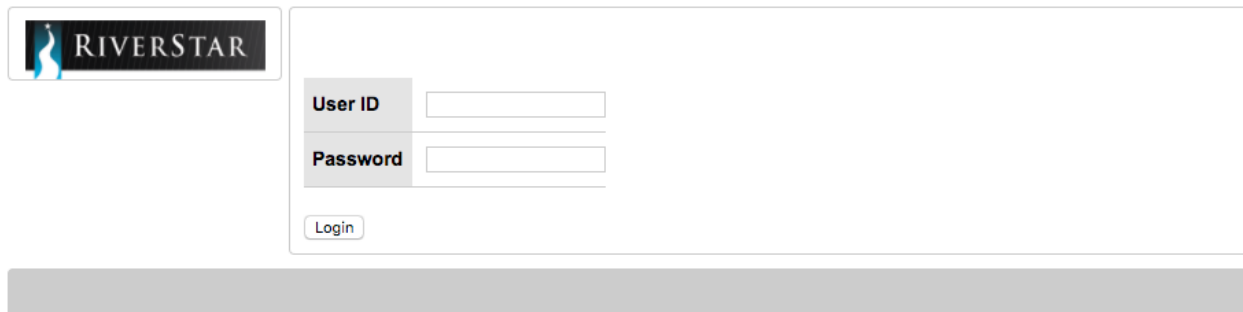


## Login

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>

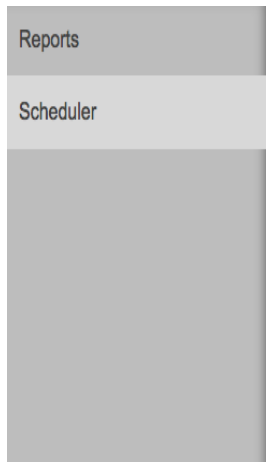
Note: Your username is your e-mail



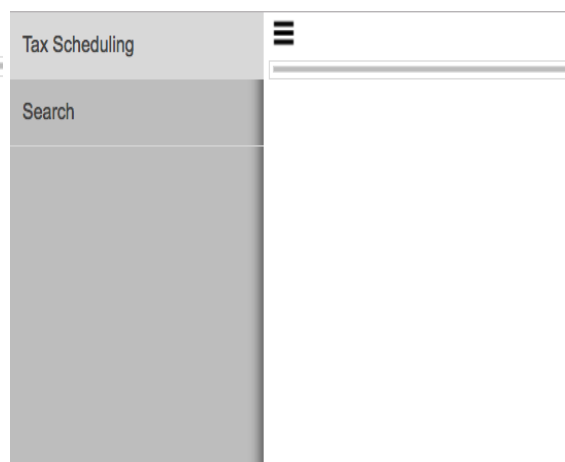
The login form features the RiverStar logo on the left, which includes a stylized river and the text "RIVERSTAR". To the right of the logo are two input fields: "User ID" and "Password". Below these fields is a "Login" button. The entire form is enclosed in a light gray border.

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.



The screenshot shows a web browser window with a tab titled "Tax Scheduling". The main content area contains the following text and options:

Welcome to the California free tax assistance scheduling site. Please select an option.

- Schedule a new appointment
- Reschedule an existing appointment
- Cancel an existing appointment

At the bottom left of the content area is a "Next" button.

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.



The screenshot shows a web browser window with a tab titled "Tax Scheduling". The main content area contains the following text and form elements:

In order to confirm your eligibility for this service, please provide a zip/postal code:

At the bottom left of the content area are "Back" and "Next" buttons.

Confirm the correct county and click next to proceed.



Tax Scheduling x

In order to confirm your eligibility for this service, please provide a zip/postal code:

**County**

Sonoma

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.



Waiting for call

Tax Scheduling x

Before we can schedule an appointment for you, please note you are eligible for free in-person assistance if you :

1. Had Household income of \$54,000 or less
2. Had no rental income (from properties you own)
3. Did not file for bankruptcy in the last year
4. Had no self employment expenses, or if you had any, they were below \$10,000.

If you can answer yes to all of the above questions, you are eligible for free in-person assistance, and if so, please proceed to schedule an appointment.

If you are ineligible for free in-person tax assistance, if your income was \$62,000 or below, you may still be able to file your taxes for free, online, using the MyFreeTaxes tool available at [www.MyFreeTaxes.org](http://www.MyFreeTaxes.org)

Note also: If you are married, but you and your spouse plan to file separate returns, only volunteers who attended IRS training on Married Filing Separately can serve those taxpayers who are Married Filing Separately, so you may want to contact the assistance site you choose, to make sure they can serve you.

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”



Language: ALL

Location: ALL

Date: [Calendar Icon]

Zip: 95476

Day of week:  Monday  Tuesday  Wednesday  Thursday  Friday  Saturday  Sunday

Certification:  Basic  Advanced

Time of day:  07:00 AM - 11:59 AM (Morning)  12:00 PM - 04:59 PM (Afternoon)  05:00 PM - 10:00 PM (Evening)

Apply Filters and Find Slots    Reset All Filters

Location	Date	Time	Available Slots	Language	Certification	Distance
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Next

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.



Tax Scheduling

Language: ALL  
Location: ALL  
Date: February 4, 2017  
Zip: 95476  
20 Miles  
Certification: Basic, Advanced  
Day of week: Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday  
Time of day: 07:00 AM - 11:59 AM (Morning), 12:00 PM - 04:59 PM (Afternoon), 05:00 PM - 10:00 PM (Evening)

Apply Filters and Find Slots    Reset All Filters

Location	Date	Time	Available Slots	Language	Certification	Distance
<input type="radio"/> Goodwill Industries Redwood	Sat, Feb 4	09:00 AM	5	English	Advanced	18.0
<input type="radio"/> Goodwill Industries Redwood	Sat, Feb 4	10:00 AM	5	English	Advanced	18.0
<input type="radio"/> Goodwill Industries Redwood	Sat, Feb 4	11:00 AM	5	English	Advanced	18.0
<input type="radio"/> Goodwill Industries Redwood	Sat, Feb 4	12:00 PM	5	English	Advanced	18.0

Next

Ask the client for their e-mail or phone number.



Tax Scheduling

Please enter an email and/or cell phone to create a new account or search for an existing account.

Email

Cell Phone

Back    Create Account



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.

Please enter or confirm the following information:

<b>Name</b>	<input type="text" value="Nalleli"/>	<input type="text" value="Sandoval"/>
<b>Email</b>	<input type="text" value="nsandoval@unitedwaysca.org"/>	
<b>Home Phone</b>	<input type="text"/>	
<b>Cell Phone</b>	<input type="text"/>	
<b>Address</b>	<input type="text"/>	
<b>Address 2</b>	<input type="text"/>	
<b>Preferred Mode of Communication</b>	<input type="text" value="Email"/>	
<b>City</b>	<input type="text"/>	
<b>State</b>	<input type="text" value="California"/>	
<b>Zip</b>	<input type="text" value="95476"/>	
<b>County</b>	<input type="text"/>	
<b>Notes</b>	<div style="border: 1px solid blue; padding: 5px;"><p>Insert client notes here. For example, "client is filing taxes for 2015 and 2016" or "client will bring spanish language interpreter"</p></div>	



To confirm, your appointment is at the following location:

Goodwill Industries Redwood

651 Yolanda  
Santa Rosa  
CA

It will be on Sat, Feb 4 at 09:00 AM.

Your confirmation number is: 51989

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

We have sent you a Email message with these details.

**Things to Remember:**

Please remember to bring the following documents to your appointment:

1. An official photo ID (like your driver's license) for you and your spouse.
2. Your original social security card or ITIN and cards of everybody who will be on your return, such as your spouse and children. We will need the actual cards; not just the numbers.
3. Bring your spouse if you are married filing jointly.
4. All of your official 2016 income documents. Some of the common documents are
  - W-2s
  - Self Employment (1099-MISC)
  - Interest Income (1099-INT)
  - Unemployment (1099-G)
  - Retirement Income (1099-R)
  - Social Security Benefits Received (1099-SSA)
  - Any other tax forms you received
5. Bring documents for any deductions or credits. Some common ones are -
  - o Did you pay for child care? Then bring
    - o Documentation of Expenses
    - o Provider Name, address and Tax ID
  - o Did you pay rent? Then bring
    - o Landlord name, address and phone
  - o Did you have education expenses? Then bring:
    - o Tuition (1098-T)
    - o Receipts for text books or other supplies
    - o Student Loan Interest (1098-E)
  - o Did you itemize your deductions? Then bring:
    - o Home mortgage interest paid (1098)
    - o Real estate taxes paid and vehicle registration fees
    - o Documentation of unreimbursed medical expenses
    - o Receipts for charitable donations

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.

Thank you for visiting California Tax Scheduling Service. Is there anything else I can help you with today?

[Reschedule/Cancel](#) [New Appt](#)

Caller's Contact Information

Nalleli Sandoval  
, MI 95476  
Email: nsandoval@unitedwaysca.org  
Home:  
Cell:

## Reschedule an Existing Appointment

Open tax scheduling and select “reschedule and existing appointment”



Tax Scheduling x

The following appointments are listed for the provided contact information:

Existing Appointments								
Location Name	Location Phone	Location Address1	Location Address 2	Location City	Date	Time	reschedule	cancel
Testing (CSD)	9165767191	2389 Gateway Oaks Drive	Suite 100	Sacramento	Tue 1/17/2017	04:00 PM	<a href="#">reschedule</a>	<a href="#">cancel</a>
Goodwill Industries Redwood		651 Yolanda		Santa Rosa	Sat 2/4/2017	09:00 AM	<a href="#">reschedule</a>	<a href="#">cancel</a>

[Back](#)



Tax Scheduling x

Language: ALL  
Location: ALL  
Date:

Zip: All

Certification:  Basic  
 Advanced

Day of week:  Monday  
 Tuesday  
 Wednesday  
 Thursday  
 Friday  
 Saturday  
 Sunday

Time of day:  07:00 AM - 11:59 AM (Morning)  
 12:00 PM - 04:59 PM (Afternoon)  
 05:00 PM - 10:00 PM (Evening)

[Apply Filters and Find Slots](#) [Reset All Filters](#)

Location	Date	Time	Available Slots	Language	Certification	Distance
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[Next](#)

## Cancel an Existing Appointment



Tax Scheduling x

Your appointment has been cancelled.



Tax Scheduling x

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? [Reschedule Appointment](#)

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.

[Back](#) [Cancel Appointment](#)

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.



Search ×

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

First Name:  Last Name:

Confirmation Number:

Phone:

Name	Confirmation Number	Location	Date	Time
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Search ×

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

First Name:  Last Name:

Confirmation Number:

Phone:

Name	Confirmation Number	Location	Date	Time
<input checked="" type="radio"/> 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.

← [Icons] Move to Inbox [Icons] More ▾ 39 of about 133 <

Your tax appointment [Inbox x] [Icons]

? noreply@caleitc4me.org Dec 5 (9 days ago) ☆ [Icons]  
to me ▾



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.