TY 2022 ACUITY APPOINTMENT SYSTEM PROCEDURES

AARP TaxAide District 45 Chrome Book Log On Instructions

- Open the Chrome Book
- **To Access the Internet:**
  1. Click on button in lower right hand corner (next to time) if needed.
  2. It should be programmed for Villages TA .If it is not, get your site leader to connect you to the internet.
- Once you accessed the local network, enter your **9 digit AARP identification number @aarpfoundation.org** into the box on the screen labeled "Enter your email"and click the "NEXT" button or press "ENTER" on your keyboard.
- Enter the password you created into the box labeled "Enter Password" and click "Next" or press ENTER on your keyboard
- On the screen that states "You're signed in ", click the "Accept and continue" button or press ENTER. There should be 3 windows that appear, just click on the bottom and **accept** as defaults.
- The Chrome browser screen should now appear, ready for your use.

To Access the Acuity Appointment Scheduling System

1. **Click** on the Chrome Browser from the bottom.
2. Type **in: Acuityscheduling.com**
3. **Select: LOGIN** from the right side of the page
   - Enter in the Username field: **Your own e-mail address**
   - Enter in the Password field: **Acuity2018**
4. The upper bar should read: secure.acuityscheduling.com/appointments/php.
5. **Bookmark** this page by hitting the little star to the right of the site name. This will make it a tab on your Chrome book that you can just select in the future. You can give it a unique name.
6. You should now see the Appointment Calendar Screen with the month on the left.
   Buttons under Today's Appointments:
7. **Calendar tab:** Set it to "All." To change the setting, just click on the button and edit as needed,
8. **New tab:** This is where we will create an appointment (Discussed below)
9. **Block tab: DO NOT TOUCH.** This is for administrator only
10. **Search:** Here you will be able to enter the taxpayer's name

*****ABSOLUTELY, NO CUSTOM APPOINTMENTS ARE TO BE MADE*****

To Make an Appointment

1. IF the taxpayer has already had an appointment in a prior year you can type their **last** name in the ***SEARCH*** box and you should be able to find their name.
    a. **Click on correct name.** Try to standardize it. (If married, use the name that will be on the top of the tax form, usually the male's name). We are trying to minimize the number of names that people have used to register.
    b. Their name, email, and phone should also be listed there, but you need to **verify** that the information is correct. A taxpayer can make an appointment without an email, but if their email is listed, they will get an appointment confirmation.
2. If their name does not appear in the search, click on NEW, and you can enter all information.
3. Choose **Schedule.** "**New Appointment**" should show.
    - **Select Appointment Type**:
        - **STANDARD** (40min). **Choose the site** the client would like.
        - Other choices: Amended Return.
        - **Amended Return** (for tax years 2019, 2020, or 2021) are done at Colony Cottage starting in March.

The current year (2022) tax return can be amended at the site where it was initially prepared, but this should not be scheduled at this time.

- Click on **Choose Calendar** and select a Taxaide location.
- Select Date (available dates will be **dark print**)
- Select Time **FROM THE LISTED TIMES ONLY**
  <u>NO CUSTOM APPOINTMENTS</u>
- Complete name, phone number, e-mail (email is a required field and the taxpayer will get a confirmation)
    - **Notes:** you can add a note such as "requests help to complete form"
    - Click on **schedule appointment**
    - On the **I+I FORM** write the **DATE and TIME and PLACE of appointment.**
    - **Remind client to bring:**
        - **cancelled check for direct deposit**
        - **Last year's tax return**

TO RESCHEDULE AN APPOINTMENT

- Click on the **SEARCH button** on top bar (will highlight in green after picked)
- Enter Client's last name, first name at the top right side of the screen
- Click on the Client's name from the list that appears
- Click on the appointment to be rescheduled at the bottom of that box
- Click on **RESCHEDULE** on the top of the box
- Select New Date and Time
- Click on **RESCHEDULE APPOINTMENT**

Write the appointment location, date and time on the I+I form. The taxpayer will receive an e-mail confirmation if they have provided an email.

TO CANCEL AN APPOINTMENT

- Click on the **SEARCH** button on top bar (will highlight in green after picked)
- Enter Client's last name, first name at the top right side of the screen
- Select the Client's name from the list that appears
- Click on the appointment to be canceled at the bottom of that box
- Click on **Cancel** at the top of the box
- Click on **Yes, Cancel Appointments**

DON'T FORGET!!! LOG OUT OF THE ACUITY APPOINTMENT SYSTEM WHEN FINISHED

Click on the **black X** of the Acuity Scheduling System in box at top right side of screen.

Closing Down the Computer:

1. Click on the grey button in the lower right corner of the screen
2. **Sign Out of** the chrome book and deselect your name.
3. Click on the **POWER BUTTON symbol,** just to the right of the “SIGN OUT” button at the top of the window.

4. When the screen is black, close the computer and pack up the computer, cords, mouse and pad and place in the computer bag.
5. Place the computer bag in the designated area.

REMEMBER NO CUSTOM APPOINTMENTS

Every individual or joint return needs an appointment. Taxpayers often think they can do their return and then do another family member at the same time---make 2 appointments for them.

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