TY 2025 ACUITY APPOINTMENT SYSTEM PROCEDURES

You may practice scheduling Tax-Aide appointments on you own computer.

For Chrome Books: Follow the Quick Guide to Using a Tax-Aide Chrome Book

To Access the Acuity Appointment Scheduling System from any computer

1. **Click** on a new tab in your browse on the computer.
2. Type **in: Acuityscheduling.com** in a new tab
3. **Select: LOG IN** from the right side of the page
    - Enter in the email 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.
7. Buttons under Today's Appointments: (in the middle of the page)

Today's Appointments

Block off time	**Add new**

All Calendar Tabs

Q Search

- **ALL calendar tab:** Should be set to "All." To change the setting, just click on the button and edit as needed.
- **BLOCK OFF TIME: Do Not Touch!**
- **ADD NEW:** select **appointment** from the drop down box
- **Search:** this is where you will enter the taxpayer's last name to check to see if they have used Villages Tax Aide before.

Touch NOTHING on the left side of the scheduling page!

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, **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 and it should be the PRIMARY tax payer.
    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 **ADD NEW**, and you can enter all information.
3. Choose **Schedule.** "**New Appointment**" should show.
    - **Select Appointment Type**:
        - **STANDARD** (40-45 min). **Choose the site** the client would like.
        - Other choices: Amended Return.
        - **Amended Return** (for tax years 2022, 2023, or 2043) are done only at Colony Cottage starting in March.

The current year (2025) tax return can be amended at the site where it was initially prepared, but this should not be scheduled but not until the first return has been completely cleared.

- Click on **Choose Calendar** and select a Taxaide location the client would like.
- Choose the **Month** desired. Move the arrow to change the month
- 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.**
    - **Highlight the above information**
    - **Give client the ½ sheet handout and remind them 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**

Remember to Close out of the Acuity Schedule:

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

Closing Down the Chromebook:

1. Click on the **grey button in the lower right corner** of the screen that contains the time along with the WiFi and battery icons.
2. Then click on the **POWER BUTTON symbol,** located at the lower left of the window that appears.
3. Click "**Shut Down**" on the window that appears. Just closing the lid continues to drain the battery.
4. 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 or take home to **recharge battery.**

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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