

Villages Tax-Aide

Walk-in Taxpayer Procedures TY 2025

- Walk-in (WI) taxpayers will be accepted this year via a “scheduled appointment time” log at most sites.
- **The Site Coordinator (SC) will set the walk-in schedule on a daily basis, based on known staffing and appointments.**
- The SC should tell the Lead CF how many and when to allow for Walk-in Appointments at the beginning of the morning. The SC can adjust it as appropriate during the day.
- The lead CF can list those “times” on the log.
- **NO CHANGES** are to be made to the walk- in appointment log **without prior approval of the SC.**
- The Lead CF should explain the process to the WI taxpayers that are waiting.
- Initially in the morning, all normal appointments will be processed before any walk-in taxpayer.
- One by one, the walk-in taxpayers can sign up for “available” times until the log is full. They can wait or leave the area, but they will not be seen prior to their time.
- Make sure to **give the taxpayer an I+I so they can fill it out prior to their time.** They should return 15 minutes before appointment time.
- Once the Walk-in Appointment Log” is full, no further walk-ins will be accepted, **UNLESS** agreed to by the SC based on the remaining appointments and staffing. The SC should then add the time to the log.
 - Unserved walk-ins should be encouraged to make a normal appointment or arrive on another day by 8am to try to be a walk-in.
- Taxpayers with regular scheduled appointments are served 1st, even if a WI has the same “appointment” time as a scheduled Taxpayer.
- Walk-in appointments should be noted on the AARP client envelope as a “WI-appointment time. (i.e.: WI 9:15)