Scheduling Software Instructions for New Hampshire Tax Appointments

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Quick and Simple Instructions (aka The Essentials)
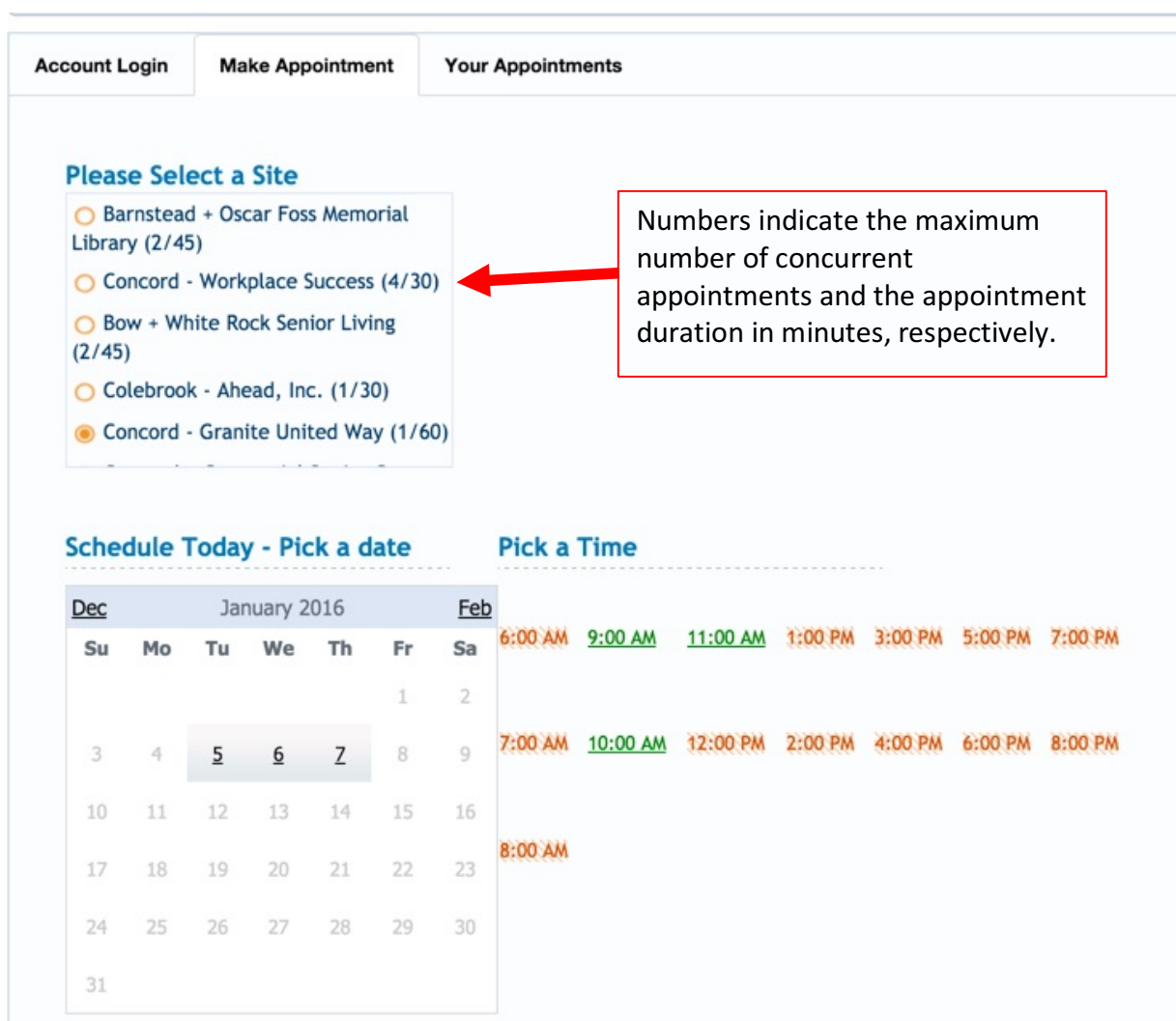
How do I get help?

If you have questions about the scheduling software, or things aren't working, or you need a password reset, etc. Email jan@nedelka.net or call or text 603 285-3873.

Making Appointments

Making an appointment is easy. You can go to: nhtaxhelp.org and click 'schedule an appointment'. This is the same interface provided to clients. If you are scheduling for multiple sites (like the fine folks at 211), you may also go to nhtaxhelp.org/211 – please note this page is NOT intended for the general public. Bookmark whichever page format you prefer, both do the same thing, just in slightly different ways.

1) Select a site, date and time.

Numbers indicate the maximum number of concurrent appointments and the appointment duration in minutes, respectively.

Valid dates and times appear in green; the others are not selectable. As of this writing, some of the interface elements appear to be changing – things may look a little different than the screen shots, but the functionality is the same.

After selecting a time, enter the required client information, and if at all possible the client's email address. All clients will receive a confirmation email *if an email address is entered*, and a reminder email of their appointment 24 hours beforehand.

2) **Enter the Client data**

Most client information is self-explanatory. Under 'Handicapped Access', ask the client if they need handicapped access (typically wheelchair access). All sites are handicapped accessible, but in some cases if the volunteers know ahead of time they may change the room to ease the process for the client.

Under 'Who is making this appointment', select the appropriate option:
- Employees of 211 should choose '211 Employee'
- 'Volunteer' is intended for any Tax-Aide or VITA volunteer
- 'Other' is intended for, say, paid employees of a facility who are taking appointments for clients (e.g. Holy Rosary Credit Union staff).
- Volunteers making an appointment for a family member should choose 'volunteer'.

3) Confirm the appointment on the final page, and you're done!

How do I find out the upcoming appointment schedule for my site?

Okay, for this you need to log in.

Select to 'Reports/Appointment Reports' at the top of the screen.

Select the timeframe you wish to know. If you have authority to see multiple sites, select the one you want a report for (or leave it alone, and you'll get a report for all sites). Next, select what information you want about your upcoming appointments. The system defaults to 'everything' which is frankly way too much. Pick your essentials for easier to read reports.

How to log into the scheduler

You *don't* need to log in to make an appointment. But logging in does give you access to more advanced features and reporting. Use the link below to access the system login page. You find it helpful to bookmark this site. Note that this is not the same login as the 'Account Login' tab on the public appointment page. Yeah, it's a bad design.

Your login is firstname_lastname, all lowercase, and your password is your last name, all lowercase if you've never logged in before. You can change your password after you log in.

https://www.eznetscheduler.com/Login.aspx

Click 'Run Report' - viola! you have a list of your upcoming appointments. You may print this page, or export to Excel, CSV, or Word documents as you like. Or write them down on a post-it note. Whatever works for you.

How do I find an existing appointment?
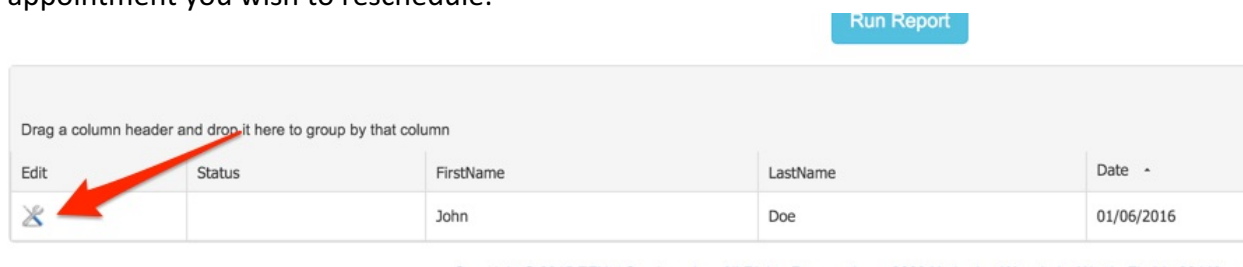
This requires you log in. Once you've logged in, navigate to the Appointment Reporting page as above, but select an end date of April 18th. For these cases, you can probably ignore the display options, and simply enter the client's last name under 'search options'. If the client's name doesn't come up, try searching for their phone number.

Click 'Run Report', and a list of clients with the matching field will appear.

How do I reschedule an existing appointment?

This requires you log in. Once you've logged in, there are two ways to reschedule an appointment. In both cases, the first step is the same:

1) Perform a client search as above, and click on the 'edit' icon on the far left of the appointment you wish to reschedule:

2a) Select 'Delete' to delete the appointment. Now, schedule the client a new appointment as you would any other. The technique requires retyping the client information, but you can be confident that the appointment is valid.

-OR-

2b) Change the start and end times of the appointment. Note that you may need to change both the start and end times! This technique preserves the existing client information; HOWEVER, IT IS POSSIBLE TO SCHEDULE THE CLIENT WHEN THE SITE IS CLOSED, OR OVERBOOK THE TIME SLOT. Use this option with caution!

Things to NOT do

In a more generalized way, don't:

   . Delete any appointments marked as 'schedule fix' or 'slot filler' unless you're REALLY sure that's what you want to do.

. Schedule appointments through the calendar view unless you feel really confident about what you're doing, and the site coordinator approves.

Detailed Instructions for 211 Staff

The 211 Scheduling Page

To simplify scheduling for 211 staff as much as possible, a custom web site has been provided at http://nhtaxhelp.org/211 . A link to these instructions is included on the page.

Home	Get Free Tax Help ▾	Volunteer Resources ▾	Volunteer!

211 APPOINTMENT SITES

Main Site List

Instructions for appointment software

Title
Colebrook - AHEAD (1/30) *VIRTUAL*
Concord - Workplace Success (6/60)
Concord + Horseshoe Pond Place (6/60)
Hudson + Hudson Senior Center (2/60)
Laconia - Laconia CAP (1/30)
Littleton - Workplace Success (3/45)
Manchester - Workplace Success (4/60)
Manchester + Easterseals (6/60)
Manchester + Families in Transition (6/60)
Nashua + Nashua Public Library (3/60)
Plymouth - Whole Village Family Resource Center (3/30) *VIRTUAL*
Salem - Boys & Girls Club (VITA) (1/30)
Salem + Boys & Girls Club (AARP Tax-Aide) (4/60)
Salem + SNHU (4/60)
White River Junction VT - St. Paul's Episcopal Church (3/60)
Windsor VT - SEVCA (60/2)

This page includes a complete listing of sites for which 211 can schedule appointments. Each site is listed as follows:

City (+/-) Host Name (concurrent appointments/appointment duration)

A '+' separator denotes Tax-Aide sites, while a '-' denotes VITA sites.

Using the Bow site in the above example, we can tell that Bow is a Tax-Aide site located at White Rock Senior Living, where they schedule two clients concurrently with an appointment duration of 45 minutes.

Virtual sites are sites which do not provide same-day turnaround; it is important to let clients know that they will drop off their paperwork one day, and will be scheduled to return at a later date (typically a week) to pick up and sign their return.
To schedule a client or learn more about a given site, simply click on it.

The Site Page for 211 Scheduling

Clicking on a site on the 211 scheduling page takes you to a site page:

Home	Get Free Tax Help ▾	Volunteer Resources ▾	Volunteer!

211 APPOINTMENT SITES

Main Site List

Instructions for appointment software

Concord + Horseshoe Pond Place (6/60)

Tu 9:00AM - 3:00PM
We 9:00AM - 3:00PM
Fr 9:00AM - 3:00PM

Jan-31 - Apr-07
6 slots, 60 min
All times displayed are valid times

Schedule Today - Pick a date

Dec			January 2017				Feb
Su	**Mo**	**Tu**	**We**	**Th**	**Fr**	**Sa**	
1	2	3	4	5	6	7	
8	9	10	11	12	13	14	
15	16	17	18	19	20	21	
22	23	24	25	26	27	28	
29	30	31					

On this page are included the days and hours of operations, as well as the maximum number of concurrent appointments and the appointment duration. This gives you a quick point of reference to help clients find an appointment that works for them.

Only valid dates and times for appointments are displayed. If a given day or time is fully booked, it will appear as 'unavailable' and be greyed out.

Appendix

General Commentary On Limits of Software

Scheduling software is strange – this particular package was selected after examining 18 others – and none are ideal. Fitting how volunteer tax sites across New Hampshire schedule their work into a single tool is very difficult, and occasionally these quirks surface in visible ways. These comments are meant to inform, not as instructions: they are completely ignorable. But if you're wondering why something 'can't' be done, it may be for the reasons below.

Among the most common in our case:

The software allows us to define a number of concurrent appointments – but that number is the same for all hours of operation for a given site. In reality many sites have different staffing levels depending on the day of the week, or are short-handed during school vacations. To compensate for this, you may see 'filler' appointments: appointments that are many hours long, and exist simply to reduce the number of concurrent appointments that can be scheduled. Some may be single-day appointments, while others may be repeating weekly throughout the season. The appointments help ensure that sites do not become overbooked and should not be changed or deleted unless you are the administrator for the location.

The software only allows one set of 'operating hours' – for the entire state. While each Site is configured with hours of availability, all sites must operate within the hours the 'company' is 'open'. This unto itself is not a big deal. What makes it complicated is that the 'valid' start times for appointments must all conform to an even multiple of when the 'company' is 'open'. For example: if the 'company' opens at 9:00AM, that's the earliest any site can open. If site A uses 60 minute appointments, and site B uses 45 minute appointments, then site A is restricted to only offering appointments at 9, 10, 11, etc. Site B is restricted to offering appointments only at 9:00, 9:45, 10:30, etc. This becomes a problem if Site B wants to open and take their first 45 min appointment at 10:00AM – in the software's simple methodology, that's not a 'valid' time. There are tricks to work around this, and they are generally hidden from clients and you as users. But artifacts sometime peek through. That's why the 'appointment time' selector always has tons of 'not available' time listed, for example.

Sample Email Sent to Client

If an email is included with the appointment information, the client will be emailed twice: once immediately after scheduling, and a second time 24 hours before their appointment. Both emails are the same. The example below is the standard letter as of 2017-Jan-02.

Dear [CustomerFirstLastName]

Thank you for making an appointment for free tax preparation via New Hampshire 211 and nhtaxhelp.org! We look forward to helping with your tax return at **[ServiceProvider]** on **[AppointmentDateDW], [AppointmentDate] at [AppointmentStartTime].**

If you no longer need your appointment, please be courteous and dial 2-1-1 to cancel your appointment so our volunteers can serve others.

If possible, please print and fill out the first two pages of this Intake Form

Please read everything below; the more information you bring, the more accurately we can prepare your return. **WHEN YOU COME FOR YOUR APPOINTMENT, YOU MUST BRING:**

- If married, it is preferable for both spouses be present
- Original (or photocopy of) social security cards for taxpayer, spouse (if married), and any dependents being claimed
- Picture ID for taxpayer and spouse (must be a Driver's License, or state issued ID Card, or other official document)
- All W-2's for all places worked in previous year
- Prior year tax return if applicable
- Routing number and bank account number for direct deposit

If applicable, bring:

- **If you're not sure, bring it! We'll be happy to review it.**
- Copies of any 1099's issued to you or you spouse (including social security!)
- Form 1095A if you received or purchased insurance via healthcare.gov
- Bank account interest year-end statement
- Student loan interest statement
- Proof of child care expenses paid (statement from provider with EIN # or Social Security #)
- Statement of post-secondary education tuition expenses paid
- Any other documents related to your previous year taxes.
- Copies of last year's mortgage interest statements (including any points paid)
- Real estate taxes paid statement
- Proof of charitable donations
- Statement of work-related expenses
- Auto registration
- Receipt of tax preparation fees paid last year
- Statement of safe deposit box fees
- Statement of union dues paid
- Any other statements of allowable itemized deductions
- If small business owner: Proof of income and expenses (in writing)

Please note that our volunteers are trained and certified by the IRS on a very specific range of tax forms and issues; some tax matters are considered 'out of scope' and we cannot prepare such returns.

Things that are Out-of-Scope include, but are not limited to:

- Schedule C (Business Profit and Loss) other than that allowed under C-EZ rules but up to $25,000 expenses
- Complicated Schedule D or without proper paperwork (Capital Gains and Losses)
- Schedule E (Rental Property) with expenses, including depreciation
- 2106 (Employee Business Expense)
- 3903 (Moving Expenses)
- 8615 (Minor's Investment Income)
- Portions of Schedule As and Bs that are not included in our training
- Schedule K-1s that involve depreciation or expense
- Other rental income or business income