

“TABLES READY”
SIGN-IN
SOFTWARE
FOR 2025 TAX
SITES









TABLES READY IS HOW WE SEE WHO HAS ARRIVED

Foundation Communities Waitlist 5 Search							
ESTIMATED CURRENT WAIT: 20 mins							
GUEST	NOTES	ESTIMATED TIME △	ARRIVAL	WAIT	NOTIFY	ACTIONS	
Mark Thomas Appt (512) 555-4444		9:00 PM (7 mins)	Not checked in	0 mins	▶ Check In	✓ ✗ ✎ 💬	
Pam Ford Appt (512) 666-7777		9:00 PM (7 mins)	8:53 PM	0 mins	💬 ☎	✓ ✗ ✎ 💬	
Dominic Moran Appt (512) 333-2222	SP	9:30 PM (37 mins)	Not checked in	0 mins	▶ Check In	✓ ✗ ✎ 💬	
Jess Roderick Appt (512) 999-8888		9:30 PM (37 mins)	Not checked in	0 mins	▶ Check In	✓ ✗ ✎ 💬	
Mabel Marks Appt (512) 222-6666	ASL	10:00 PM (1 hr 7 mins)	Not checked in	0 mins	▶ Check In	✓ ✗ ✎ 💬	

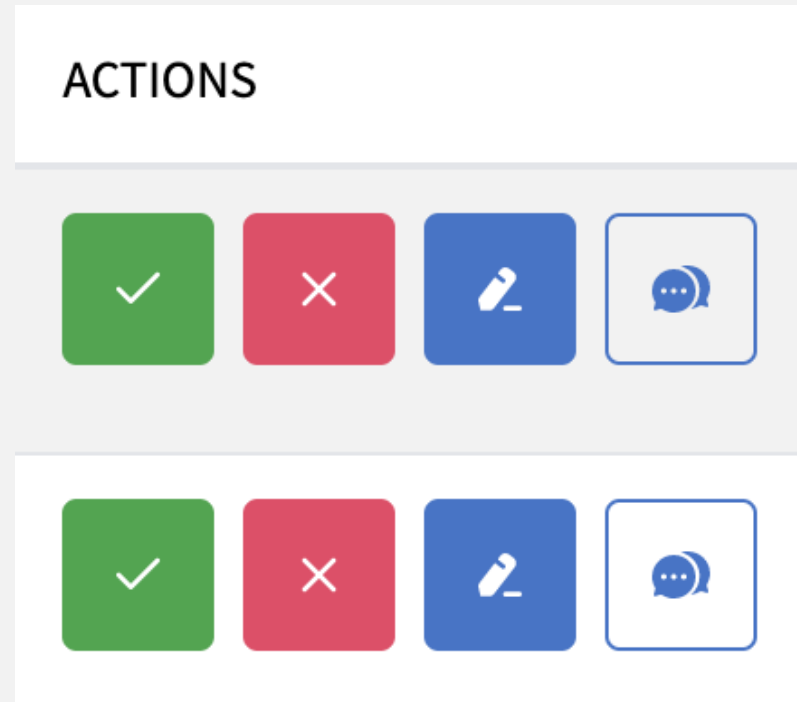
- Waitlist
- Appointments
- Recent
- Analytics
- Guests
- Settings
- Logout

WHO TO CALL NEXT

Foundation Communities Waitlist 5						
ESTIMATED CURRENT WAIT: 20 mins						
GUEST	NOTES	ESTIMATED TIME Δ	ARRIVAL	WAIT	NOTIFY	
Mark Thomas Appt (512) 555-4444		9:00 PM (7 mins)	Not checked in	0 mins	▶ Check In	
Pam Ford Appt (512) 666-7777		9:00 PM (7 mins)	8:53 PM	0 mins	⋮ ☎	
Dominic Moran Appt (512) 333-2222	SP	9:30 PM (37 mins)	Not checked in	0 mins	▶ Check In	
Jess Roderick Appt (512) 999-8888	1 of 2 appts	9:30 PM (37 mins)	Not checked in	0 mins	▶ Check In	
Mabel Marks Appt (512) 222-6666	ASL	10:00 PM (1 hr 7 mins)	Not checked in	0 mins	▶ Check In	

-  Messages
-  Waitlist
-  Appointments
-  Recent
-  Analytics
-  Guests
-  Settings
-  Logout

MARKING CLIENTS AS SERVED



Manage these once the client is at the intake desk.

Select the green check box to mark a client as served.

Select the red “x” to cancel and remove a client from the list.



To be used only by Site Managers or Staff!

HOW TO ADD A WALK-IN TO THE WAITLIST

The screenshot shows a web application interface for managing a waitlist. The main header is "Foundation Communities Waitlist" with a notification that the credit card has expired. A table lists guests with columns for name, phone, notes, estimated time, and actions. A modal window titled "Add to Waitlist" is open, showing input fields for phone, name, and estimated time (set to 1), along with a notes dropdown and confirm/cancel buttons. A red arrow points to a green plus icon in the bottom right corner of the interface.

GUEST	NOTES	ESTIMATED TIME	NOTIFY	ACTIONS
Mark Thomas (512) 555-4444		8:30 PM (7 mins)	▶ Check In	✓ ✗ ✎ 🗨
Pam Ford (512) 666-7777		8:30 PM (7 mins)	▶ Check In	✓ ✗ ✎ 🗨
Mabel Marks (512) 222-6666	ASL	11:00 PM (2 hrs 37 mins)	▶ Check In	✓ ✗ ✎ 🗨

Estimated time should ALWAYS be set to 1.

YOU CALLED A CLIENT AND THEY'RE NOT AROUND - STEPS TO TAKE ON THE WAITLIST

11:42 AM Foundation Communities Waitlist 9

Free trial account. Expires in in a day, with 120 messages remaining. Subscribe today.

ESTIMATED CURRENT WAIT: No wait

GUEST	NOTES	ESTIMATED TIME ▲	ARRIVAL	WAIT	NOTIFY	ACTIONS
Harry Appt		11:15 AM (27 min)	Not checked in	0 min	▶ Check In	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Janet		11:18 AM (23 min)	11:17 AM	24 min	<input type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Lucinda Appt		11:30 AM (12 min)	11:36 AM	5 min	<input type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Martha Appt		11:30 AM (12 min)	11:33 AM	8 min	<input type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Yuleidy		11:38 AM (3 min)	11:37 AM	4 min	<input type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Gladys Campos	Return Visit Slip	11:42 AM (0 min)	11:41 AM	0 min	<input type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Navigation: Waitlist, Appointments, Recent, Analytics, Guests, Settings, Logout, Guided Tour

Appointment time: 11:15 AM | Current time: 11:42 AM

LET'S MAKE A NOTE

The screenshot shows a 'Foundation Communities Waitlist' interface. A modal window titled 'Edit' is open, allowing for guest information updates. The modal includes fields for 'PHONE', 'NAME' (pre-filled with 'Harry'), and 'ESTIMATED TIME' (pre-filled with '-27'). A 'NOTES' section is also present, with a dropdown menu showing options: 'Select notes', 'Return visit slip', '1095-A with ICT', '1st call' (highlighted with a blue box), and '2nd call'. A red arrow points from the '1st call' option in the notes dropdown to the pencil icon in the 'ACTIONS' column of the background table. The background table lists guests with their names, appointment status, and estimated wait times.

GUEST	NOTES	ESTIMATED CURRENT WAIT	ACTIONS
Harry	App		Check In, ✓, ✗, Edit, Phone
Janet			✓, ✗, Edit, Phone
Lucinda	App		✓, ✗, Edit, Phone
Martha	App	11:30 AM (12 min)	✓, ✗, Edit, Phone
Yuleidy		11:38 AM (4 min)	✓, ✗, Edit, Phone
Gladys Campos	Return Visit Slip	11:42 AM (0 min)	✓, ✗, Edit, Phone

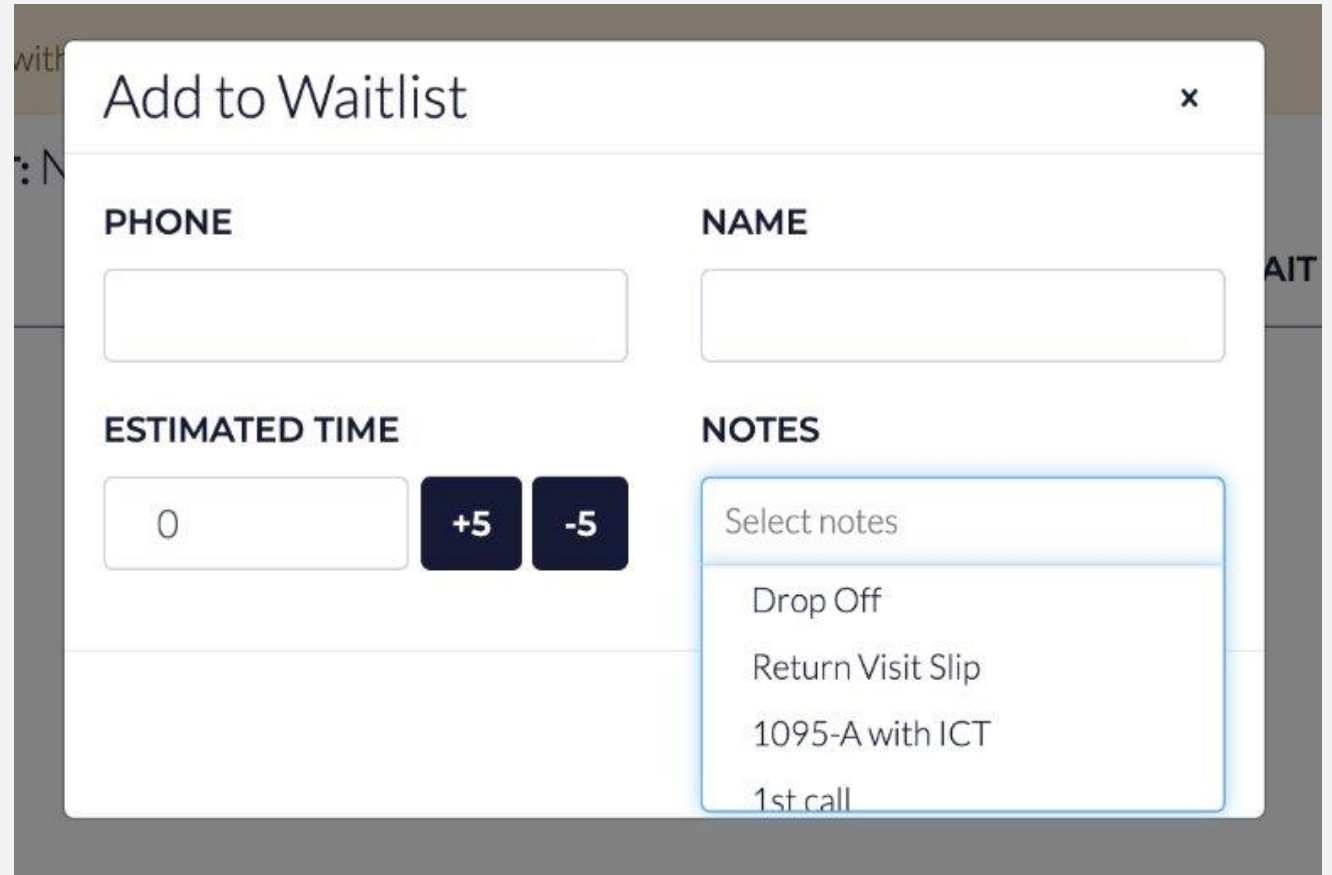
First, click the pencil icon to create a note.

For a walk-in, call their name and then select 1st call if no answer.

For an appt, you could call their name just to see if they forgot to check in.

WHILE WE'RE TALKING ABOUT NOTES

- Notes are optional.
- Choose from the menu or create your own.
- Dropdown options are:
 - Return Visit Slip
 - 1st call
 - 2nd call
 - IRS Letter
 - Follow-up/Question



The screenshot shows a web form titled "Add to Waitlist" with a close button (x) in the top right corner. The form is divided into four sections:

- PHONE:** A text input field.
- NAME:** A text input field.
- ESTIMATED TIME:** A text input field containing the number "0", with two dark blue buttons labeled "+5" and "-5" to its right.
- NOTES:** A dropdown menu with a light blue border. The selected option is "Select notes". The visible options in the dropdown are "Drop Off", "Return Visit Slip", "1095-A with ICT", and "1st call".

WHEN TO CANCEL FROM THE LINE

11:43 AM Foundation Communities Waitlist 9

Free trial account. Expires in in a day, with 120 messages remaining. Subscribe today.

ESTIMATED CURRENT WAIT: No wait

GUEST	NOTES	ESTIMATED TIME ▲	ARRIVAL	WAIT	NOTIFY	ACTIONS
Harry Appt	1st call, 2nd call	11:16 AM (27 min)	Not checked in	0 min	▶ Check In	✓ ✗ ✎ 🗨️
Janet		11:18 AM (24 min)	11:17 AM	25 min	🗨️ 📞	✓ ✗ ✎ 🗨️
Lucinda Appt		11:30 AM (13 min)	11:36 AM	7 min	🗨️ 📞	✓ ✗ ✎ 🗨️
Martha Appt		11:30 AM (13 min)	11:33 AM	9 min	🗨️ 📞	✓ ✗ ✎ 🗨️
Yuleidy		11:38 AM (4 min)	11:37 AM	5 min	🗨️ 📞	✓ ✗ ✎ 🗨️
Gladys Campos	Return Visit Slip	11:42 AM (0 min)	11:41 AM	1 min	🗨️ 📞	✓ ✗ ✎ 🗨️

Guided Tour

We did a 1st call and 2nd call with no answer.
We click the “X” to remove him from the waiting list.

**BUT WAIT!
HARRY SHOWS UP.**

**HARRY WILL NEED TO START
AGAIN!!**

Document, document, document!

THINGS TO KEEP IN MIND BEFORE ADDING A WALK-IN

- Set clear expectations for walk-in clients about the length of time they'll have to wait **AND** confirm they accept.

"If you would like to be seen as a walk-in, you might have 2-3 hours before you are seen. We must prioritize folks with appointments. Then the tax prep process can take another 2-3 hrs. **Do you want to move forward?** We can add you as a walk-in or we could schedule an appointment for another day."



Check with the Site Manager before manually adding walk-ins



TEXTING

THINGS TO KNOW ABOUT SMS NOTIFICATIONS:

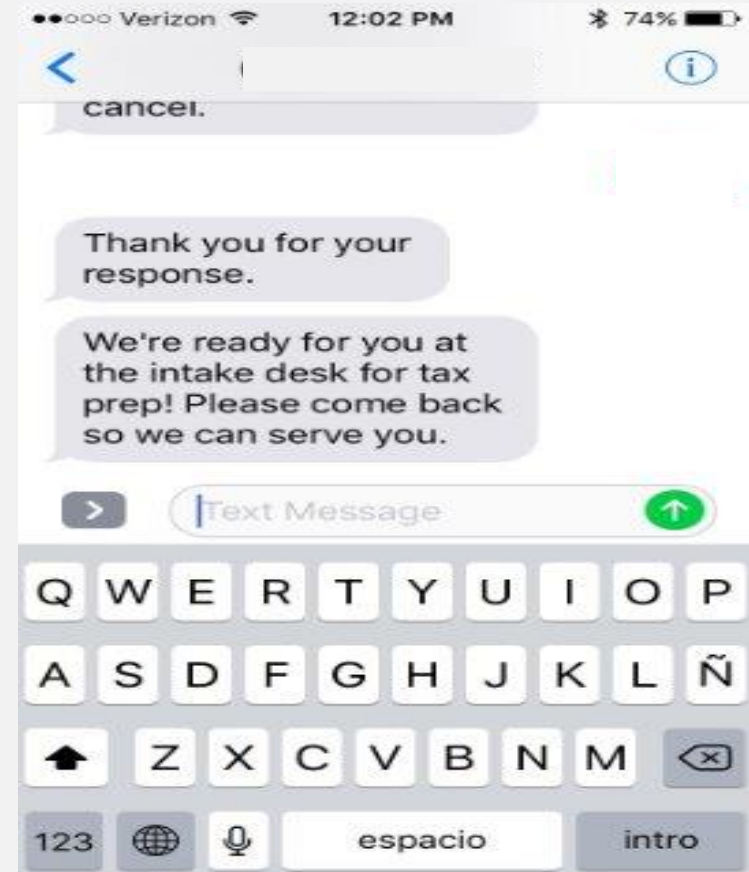
- A phone number must have been entered to receive notifications.
- We do not want to sign in more than one guest under the same phone number.
- Examples of when a text nudge should be sent.
- Client must wait in their car for health reasons
- TP has been waiting a long time and they might have stepped away to grab lunch
- You've been waiting on a TP for a long time, and you are about to change shift.



 Don't make a habit of sending texts 

THINGS TO KNOW ABOUT SMS NOTIFICATIONS – CONT'D

This is what the text “nudge”
looks like:





QUESTIONS?

IF EVER IN DOUBT, ASK A
STAFF MEMBER!