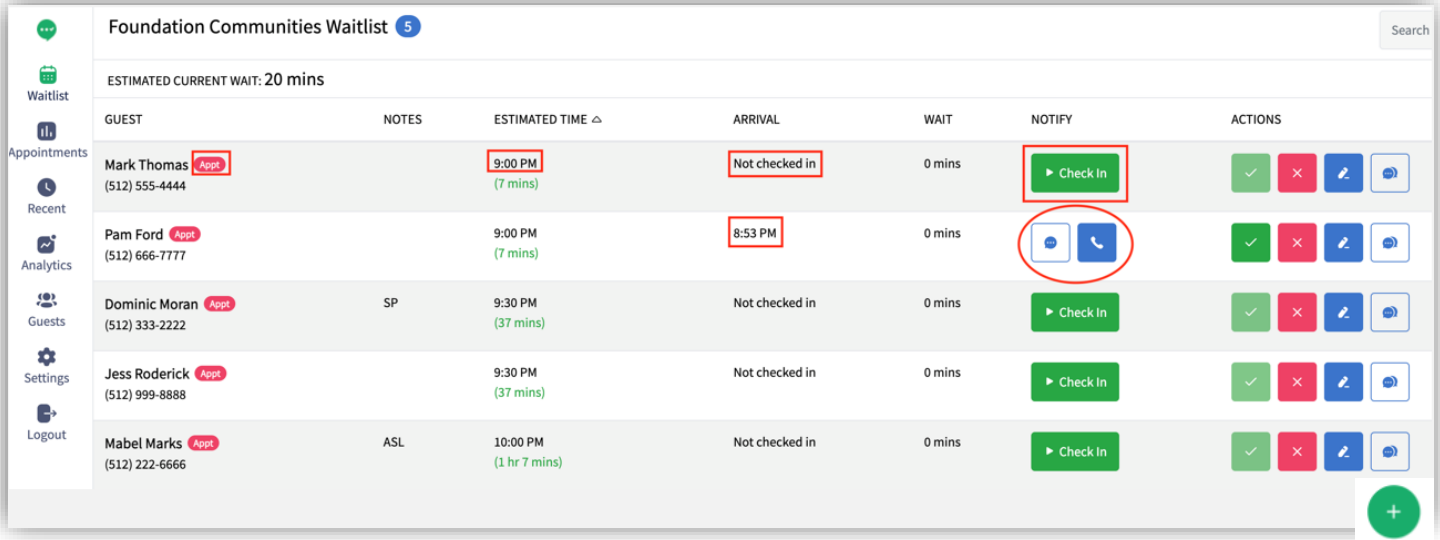


## How to schedule an appointment?

To schedule an appointment for a client, please visit our website at [www.prospertaxhelp.org](http://www.prospertaxhelp.org) or have the client call us at 512-610-7374.



GUEST	NOTES	ESTIMATED TIME	ARRIVAL	WAIT	NOTIFY	ACTIONS
Mark Thomas (512) 555-4444		9:00 PM (7 mins)	Not checked in	0 mins	▶ Check In	✓ ✕ ↺ 🗨
Pam Ford (512) 666-7777		9:00 PM (7 mins)	8:53 PM	0 mins	🗨 📞	✓ ✕ ↺ 🗨
Dominic Moran (512) 333-2222	SP	9:30 PM (37 mins)	Not checked in	0 mins	▶ Check In	✓ ✕ ↺ 🗨
Jess Roderick (512) 999-8888		9:30 PM (37 mins)	Not checked in	0 mins	▶ Check In	✓ ✕ ↺ 🗨
Mabel Marks (512) 222-6666	ASL	10:00 PM (1 hr 7 mins)	Not checked in	0 mins	▶ Check In	✓ ✕ ↺ 🗨

## A client has arrived for their appointment. How do you check them in?

1 Search for the appointment by name and phone. 2 Click the ▶ Check In button to the right of the client’s name to notify the tax team of their arrival. 3 Hand the client an intake clipboard, ask them to review the laminated pink sheet, and complete the Client Intake Sheet as best as they can.

## How to tell if someone has a scheduled appointment?

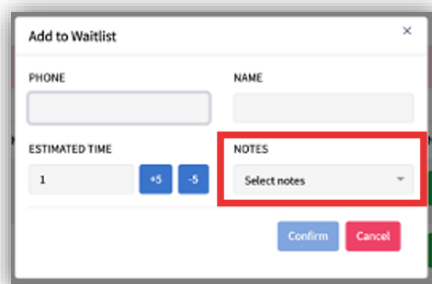
A person has an appointment if the **Appt** icon displays next to their name.

## What if someone wants to cancel their appointment?

Please refer them to our tax line: 512-610-7374 or speak with the Site Manager.

## How to add a walk-in client to the Waitlist with the Tax Help team’s approval?

To add a walk-in to the waitlist, 1 click the + button in the bottom right corner. 2 Add the client’s phone number, name and select “walk-in” from the *Notes* drop-down tag menu. 3 Click “Confirm” once done.



**Add to Waitlist** ✕

PHONE


NAME

ESTIMATED TIME  +5 -5

NOTES

Confirm Cancel

**How to remove someone from the Waitlist who needs to leave?**

If a client lets you know they need to leave, find their name in tables ready and select the  button.

**What if you can't find someone's appointment in TablesReady?**

If you're unable to find someone's appointment in TablesReady, ask the client to please show you their confirmation email. If they are confirmed for the date, please add them to the TablesReady waitlist.

**How to help a client confirm their appointment for a future date?**

If someone wants to confirm their appointment for a future date, refer them to our tax line: 512-610-7374.

**If you're unable to answer a question, please ask the Site Manager on shift or the CSS team for assistance!**