Accounting Aid Society SINCE 1972

We use taxes to build relationships. And relationships to build futures.

Quickbase Guide

QUICKBASE GUIDE

Please use this guide as a way to navigate your way through the new client based Quickbase update. Please be aware that the access you have may be different than another user, so make sure you are looking at the instructions for the correct user as what you can view may be different.

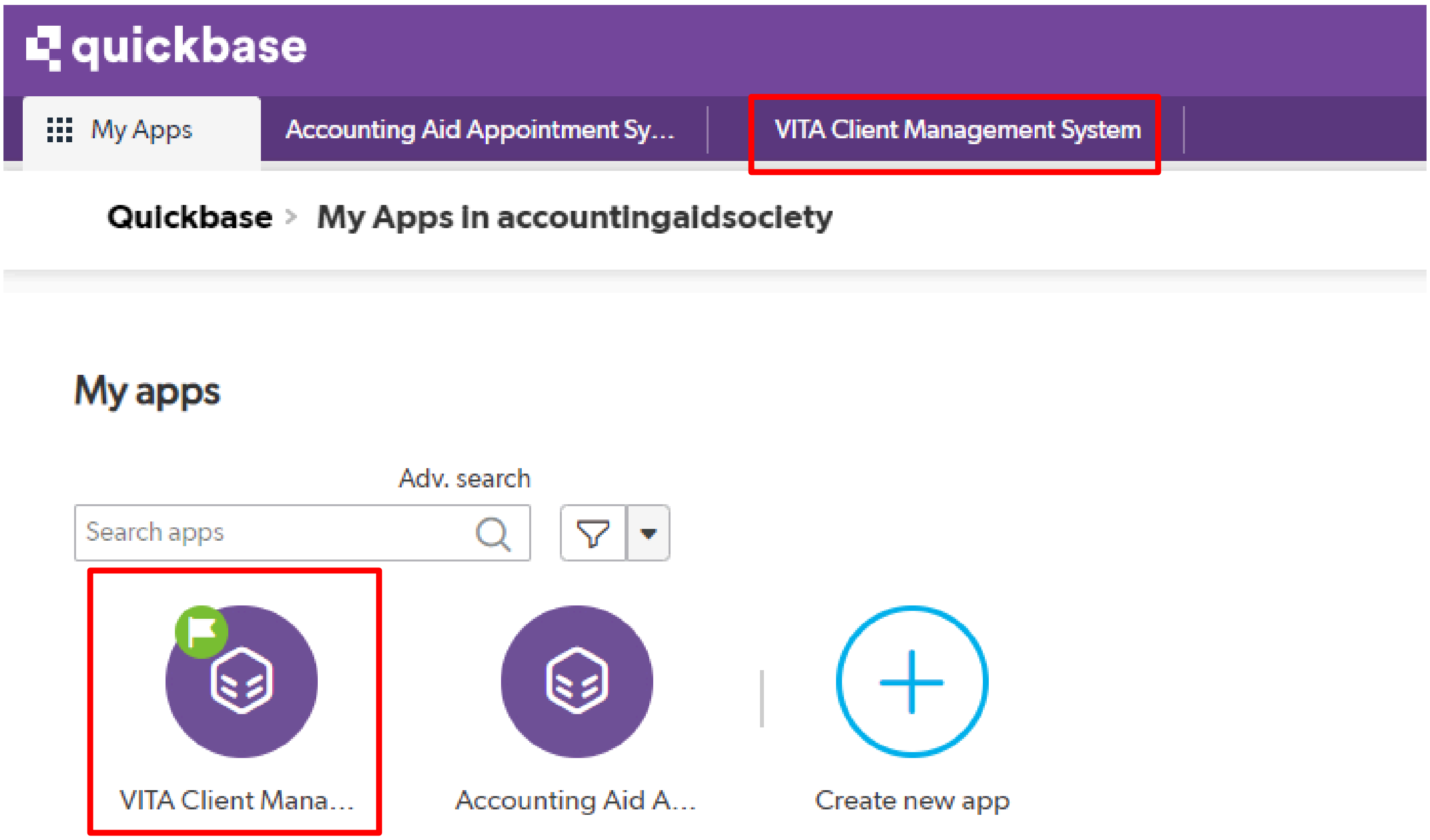
As always, if you find anything wrong with the system, please contact:
Maysaa at mrahal@accountingaidsociety.org
Sam at sspolarich@accountingaidsociety.org

Table of Contents

BASICS FOR ALL USERS

Finding your homepage

1. Click here to log into Quickbase using your Accounting Aid issued email and password.
2. If Quickbase opens to the “**My Apps in accountingaidsociety**” page, click on “**VITA Client Management System**”



3. Your screen should then show one of the following in the top left corner:

VITA Client Management System > **Site Coordinator Homepage**

VITA Client Management System > **Staff Homepage**

VITA Client Management System > **Volunteer Tax Sites**

VITA Client Management System > **Location Homepage**

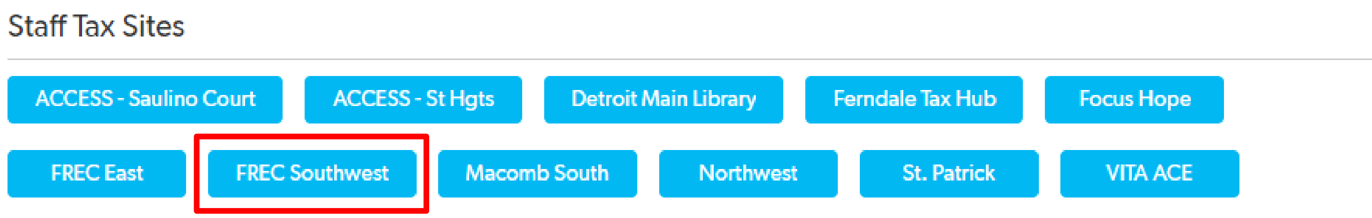
Status Explanations

STAGE	STATUS	EXPLANATION	ADDITIONAL STEP REQUIRED
Appointment	Hold	Appointment is on hold so the call center does not schedule during this time.	None
Appointment	Open	Appointment is open and can be filled by call center, client via online scheduler, location schedulers or site coordinators.	None
Appointment	In Process	Appointment is currently being filled.	Do not touch while in this status.
Appointment	Reserved	Appointment is taken.	None
Appointment	Cancelled	Appointment was cancelled. **DO NOT change service status to cancelled. Cancelled status is only related to the appointment.**	
In Production	LITC Client, Hold		
In Production	Missing Information		
In Production	Request to LITC		
In Production	Signature Complete		
In Production	Client Being Served Currently		
In Production	Pending		
Final Outcome	E-filed		
Final Outcome	Paper		
Final Outcome	No Show		
Final Outcome	Out of Scope		
Final Outcome	Refused		
Final Outcome	No Service Needed		
Final Outcome	Complete		
Final Outcome	Rejected		

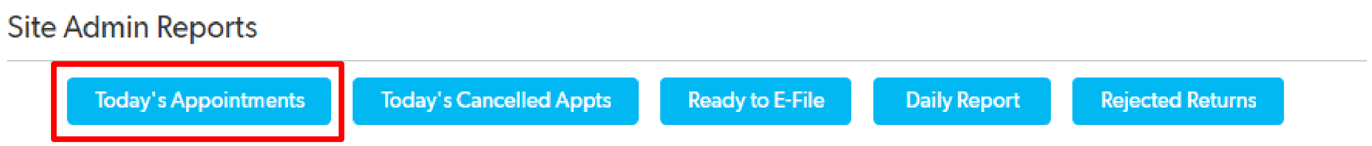
STAFF SITE COORDINATORS

Finding your appointments for the day

1. On your homepage, click on the site you are looking for under “**Staff Tax Sites**”.



2. Under “**Site Admin Reports**” click on the “**Today’s Appointments**” button.



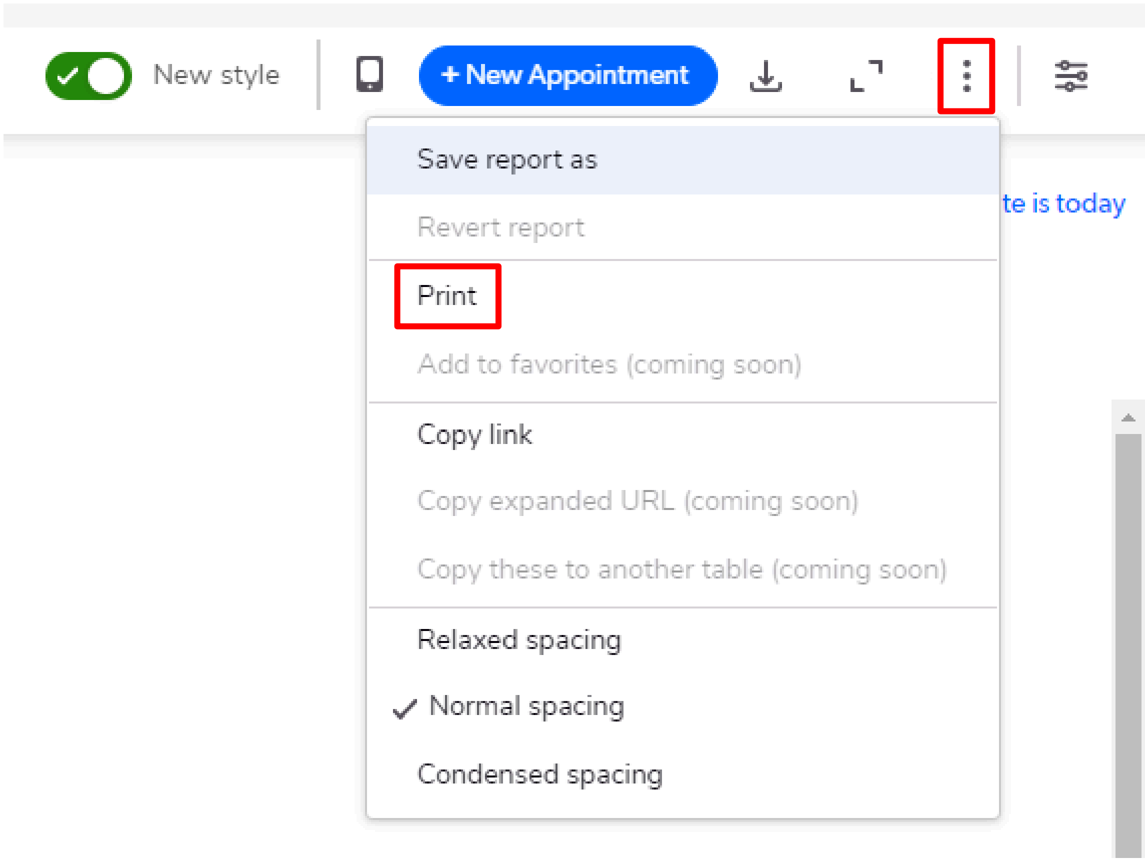
3. A report that shows all appointments (whether they are open, reserved, cancelled or on hold) will pop up.

Appointments > **FREC Southwest**
Reports & Charts

Search records | Location Type | Location | Scheduled By | Status

Location	Schedule Date	Start Time ↑	Client Name	Client - Last 4 of SSN	Status	# of Services
FREC Southwest	01-23-2023	9:00 am			Reserved	0
FREC Southwest	01-23-2023	9:00 am			Open	1
FREC Southwest	01-23-2023	9:00 am			Open	1
FREC Southwest	01-23-2023	10:00 am			Open	1
FREC Southwest	01-23-2023	10:00 am		3146	Reserved	1
FREC Southwest	01-23-2023	10:00 am		8028	Reserved	1
FREC Southwest	01-23-2023	11:00 am		1249	Reserved	1
FREC Southwest	01-23-2023	11:00 am		3495	Reserved	1
FREC Southwest	01-23-2023	11:00 am		1834	Reserved	1
FREC Southwest	01-23-2023	1:00 pm		9540	Reserved	1
FREC Southwest	01-23-2023	1:00 pm		4671	Reserved	1
FREC Southwest	01-23-2023	1:00 pm		3084	Reserved	1
FREC Southwest	01-23-2023	1:00 pm		7129	Reserved	1
FREC Southwest	01-23-2023	1:00 pm			Open	0
FREC Southwest	01-23-2023	2:00 pm		9238	Reserved	1

4. This report can be printed by clicking on the three vertical dots in the top left corner, then clicking on “**Print**”



Scheduling an appointment for a client

1. If a client comes in wanting to make an appointment, click on the "**Appointments**" icon in the top table bar.

2. A report that shows all open appointments for each site will pop up. Click on the site and the day the client wants an appointment for.

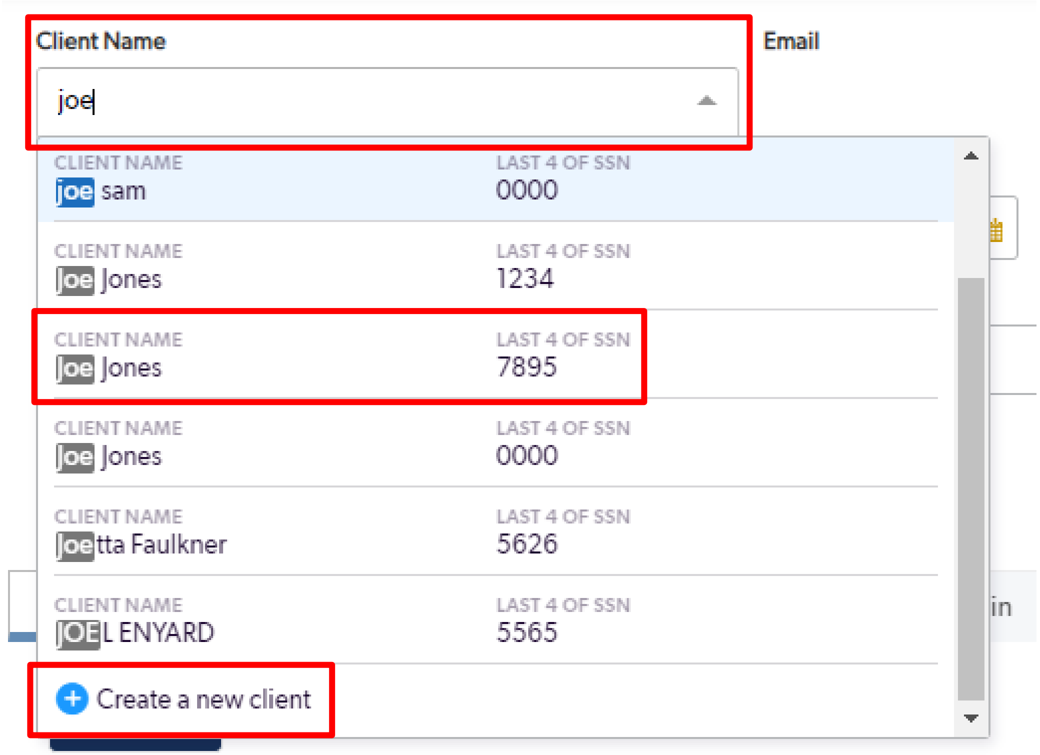
Call Center View - Open Appts by location/day

Schedule Date	01-23-2023	01-24-2023	01-25-2023	01-26-2023	01-27-2023	01-28-2023	01-30-2023	01-31-2023	02-01-2023	02-02-2023	02-03-2023	02-04-2023	02-06-2023	02-07-2023	02-08-2023	02-09-2023	02-10-2023	02-11-2023
Location	Open Appts (tot)	Open Appts (tot)	Open Appts (tot)	Open Appts (tot)	Open Appts (tot)	Open Appts (tot)	Open Appts (tot)	Open Appts (tot)	Open Appts (tot)	Open Appts (tot)	Open Appts (tot)	Open Appts (tot)	Open Appts (tot)	Open Appts (tot)	Open Appts (tot)	Open Appts (tot)	Open Appts (tot)	Open Appts (tot)
ACCESS - Saulino Court	.	5	.	0	.	0	.	0	.	0	.	.	.	0	.	0	.	0
ACCESS - Sterling Heights	.	.	.	.	0	.	.	.	.	.	0	.	.	.	.	.	0	.
Brighton Library	.	.	.	.	.	.	.	.	.	.	.	.	2	.	.	.	.	.
Brighton Senior Center	.	.	.	.	.	.	.	.	.	.	.	.	.	4	.	.	.	.
Detroit Main Library	.	8	17	29	20	27	.	0	0	0	1	0	.	0	1	14	27	8
Ferndale Tax Hub	.	.	.	.	.	.	.	.	0	.	0	0	13	24	26	29	27	20
Fisher Magnet Academy (FREC East)	6	4	14	23	14	12	0	0	0	0	0	0	0	0	0	5	18	20
Focus Hope	.	16	20	23	24	0	14	0	15	18	18	17	.	0	0	0	0	0
FREC Southwest	6	11	13	10	17	4	1	0	0	0	0	0	15	28	29	28	25	20
Howell Library	.	.	.	.	.	11	.	.	.	.	.	14	.	.	.	.	.	12

3. Find the time the client wants the appointment for and click on the pencil icon on the left of the appointment.

	Client Name	Client - Last 4 of SSN	Location	Location Type	Schedule Date	Start Time	Scheduled By	Status	Mobile Phone	Primary Phone
			Focus Hope	In-person Tax Prep	01-30-2023	10:00 am		Open		
			Focus Hope	In-person Tax Prep	01-30-2023	10:00 am		Open		
			Focus Hope	In-person Tax Prep	01-30-2023	10:00 am		Open		
			Focus Hope	In-person Tax Prep	01-30-2023	11:00 am		Open		
			Focus Hope	In-person Tax Prep	01-30-2023	11:00 am		Open		
			Focus Hope	In-person Tax Prep	01-30-2023	11:00 am		Open		
			Focus Hope	In-person Tax Prep	01-30-2023	1:00 pm		Open		
			Focus Hope	In-person Tax Prep	01-30-2023	1:00 pm		Open		

4. In the "**Client Name**" box, type the client's name to determine if they are already in the system as a client.

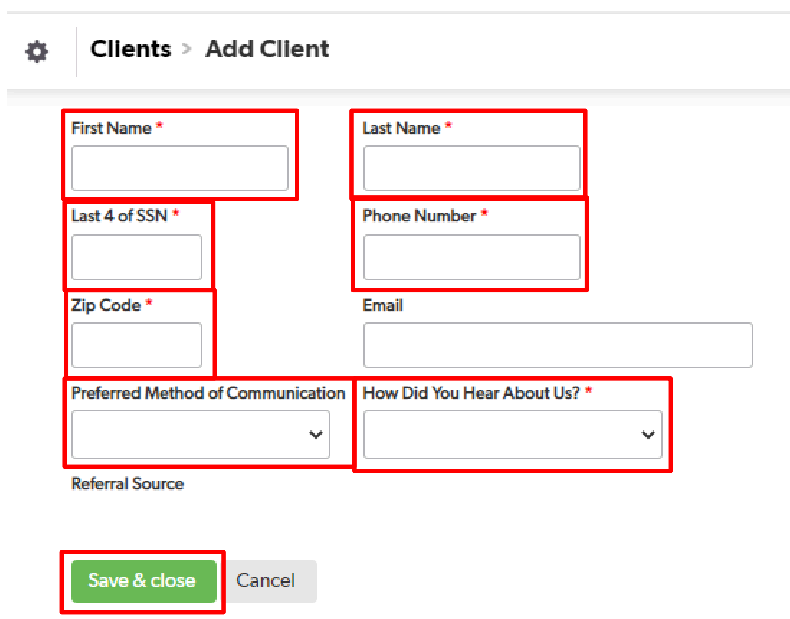


5. If the client is already in the system, click on the client's name in the drop down box. Be sure to check the last four of the SSN to make sure it is them.

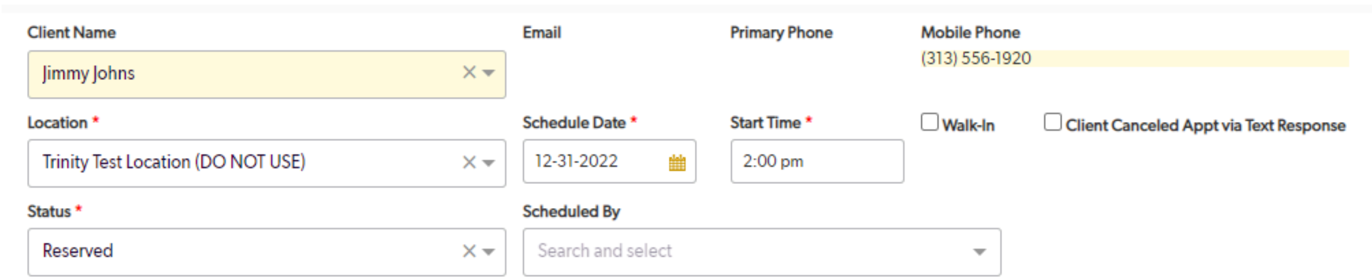
6. If the client is not already in the system, click on "**Create a new client**".

7. An "**Add Client**" screen will pop up. Enter the clients first and last name, last four of their social security number, mobile phone number, zip code, email (if they have one), their preferred method of communication, and how they heard about us.

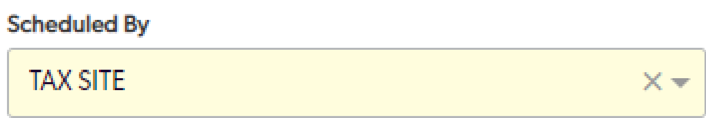
8. Click on "**Save & close**"



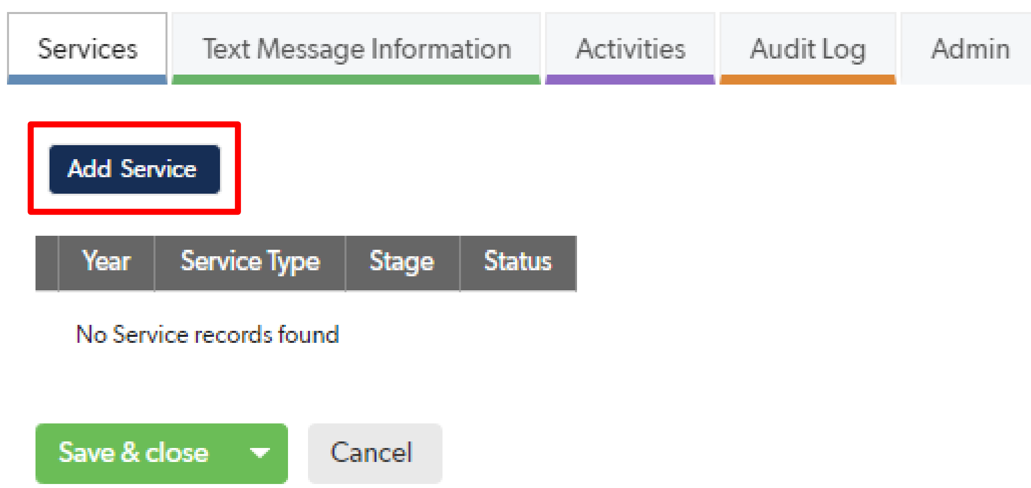
9. The clients entered information will then automatically populate into the appointment information as so:



10. Click on the "**Scheduled By**" drop down, and select "**TAX SITE**"

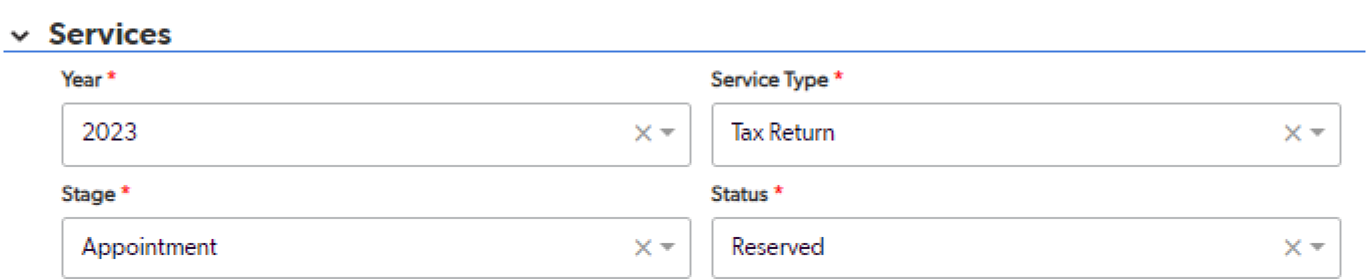


11. Scroll down to the "**Services**" section and click on "**Add Service**".



12. When the "**Add Service**" screen pops up, select the following from each drop down box:

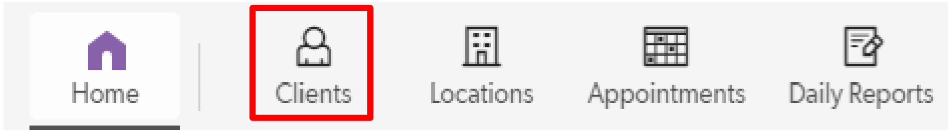
Year: **2023** Service Type: **Tax Return** Stage: **Appointment** Status: **Reserved**



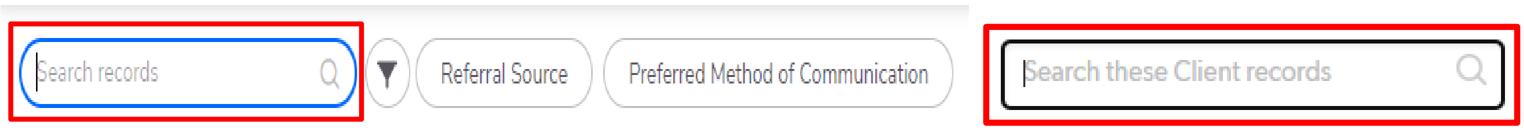
13. Click "**Save & close**" to save the service, and then "**Save & close**" again to save the appointment.

Handling Rejects

1. If you find a return from your site was rejected in TaxSlayer, click on "**Clients**" in the table bar.

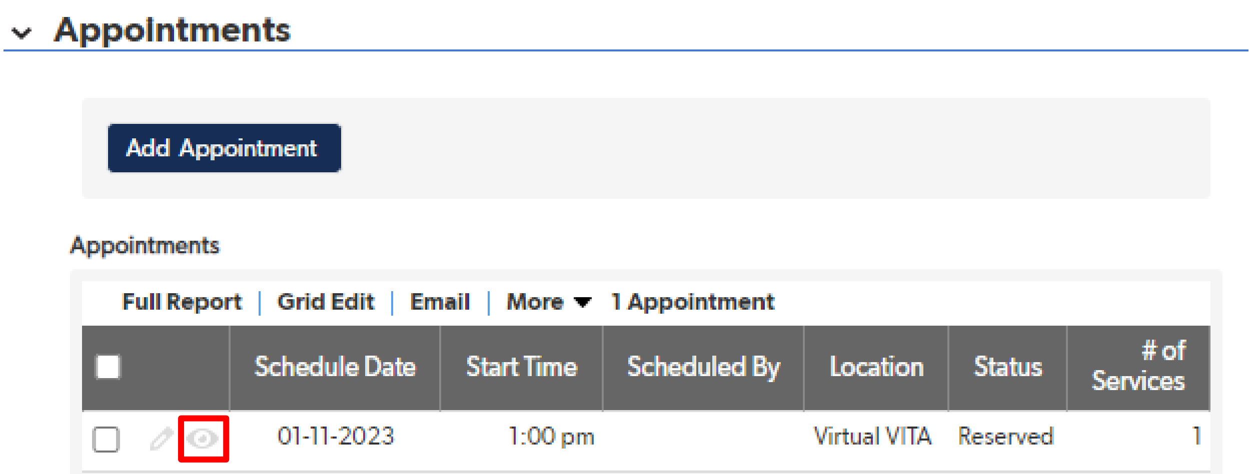


2. In the "**Search records**" or "**Search these Client records**" box (depending on which version of Quickbase you are viewing), type the client's name.

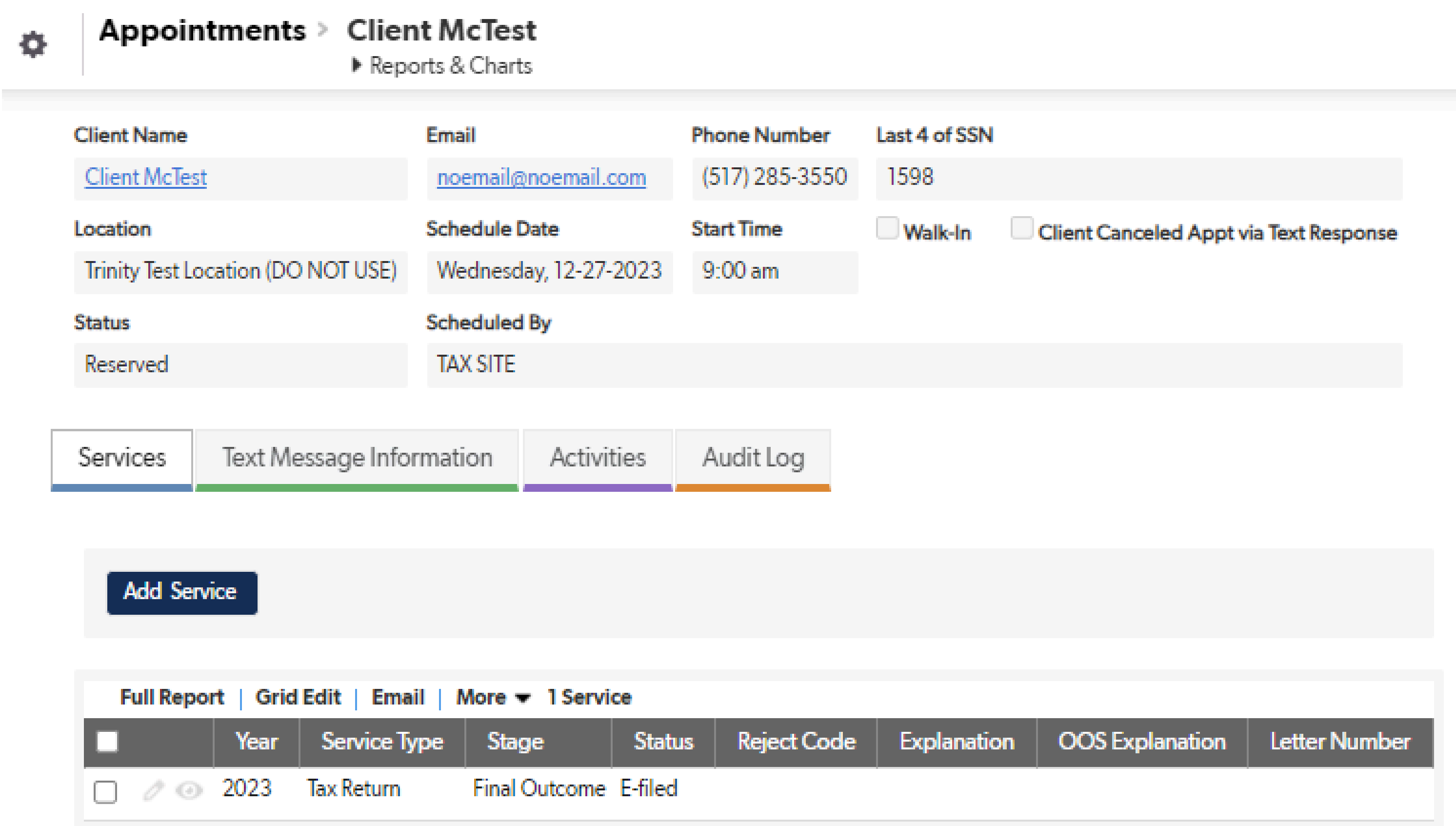


3. When you've located the client, click on the eyeball icon next to their name.

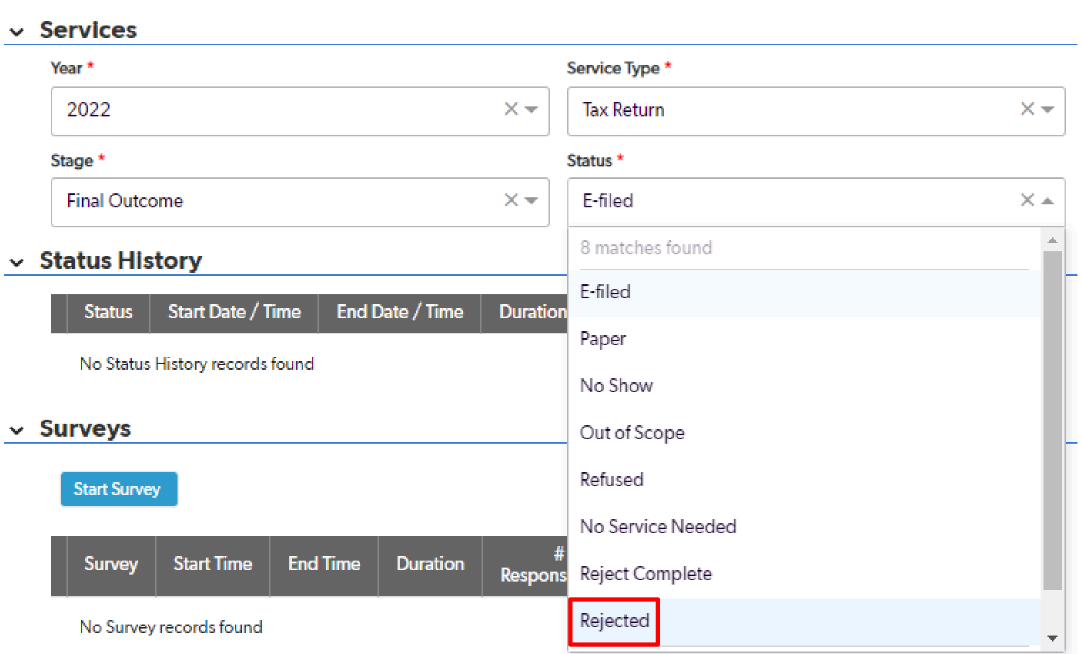
4. Under the "**Appointments**" section, click on the eyeball icon for the appointment where their return was e-filed.



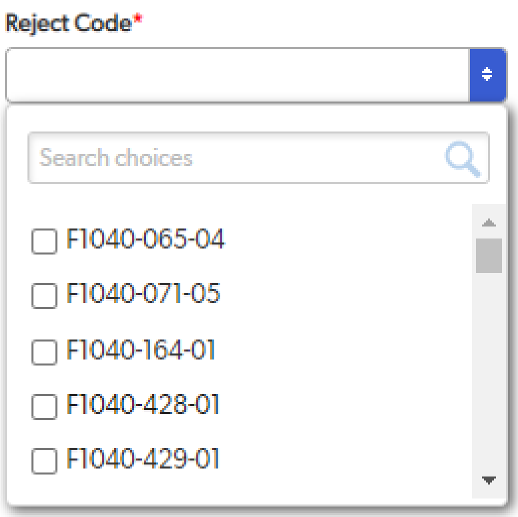
5. When the appointment pops up, you should see the 2023 tax return service with the status as “**E-filed**”.



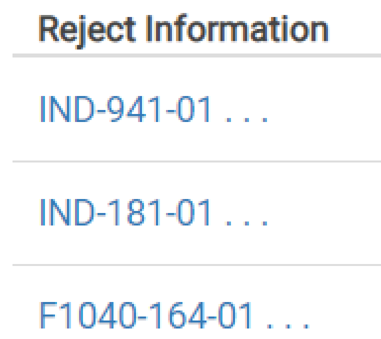
6. Click on the pencil icon next to “**2023 Tax Return**” and change the status to “**Rejected**” to let us know that the return was rejected.



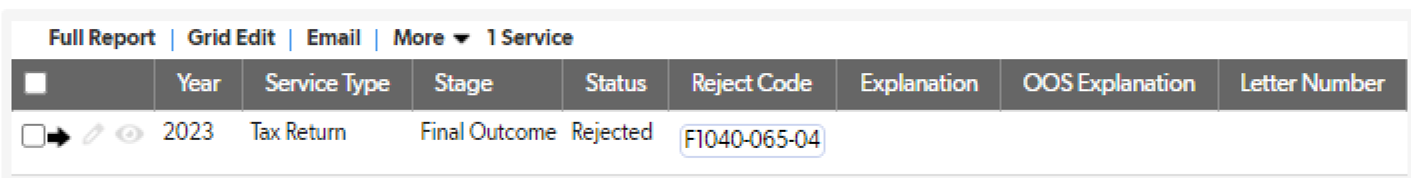
7. Add the reject code from TaxSlayer, then click “**Save & close**”.



Screenshot of Reject Codes from TaxSlayer



8. It will return you back to the appointment screen and you should see the service, along with the reject code.



9. When the client returns to have their reject fixed, follow steps 1 through 4 above to find the client and service again and click on the pencil icon for the “**2023 Tax Return**” service.

10. Change the status of the “**2023 Tax Return**” to “**E-filed**” or “**Paper**” depending on what the final outcome of the rejected return was. Click “**Save & close**”.

Note: Please let the client know they will receive another text message letting them know that their return was e-filed. Let them know that that is confirmation that we resent their rejected tax return to the IRS.

Reject Codes

Code	Description	How to Handle	Who Handles
R0000-932-02 R0000-194 IND-515-01	Taxpayer TIN in the Return Header must not be the same as a TIN of a previously accepted electronic return for the return type and tax period indicated in the tax return	Paper file with cover letter. Get LITC involved if client returns due to an issue with this reject.	Site Coordinator
R0000-507-01 SEIC-F1040-506-02	'DependentSSN' on Line 6c(2) of the return was used as a Dependent SSN in a previously filed tax return for the same tax period.	Paper file with documents proving that the taxpayer has the right to claim dependent.	Site Coordinator
IND-516	If the Primary Taxpayer is claimed as an exemption in the return, then the Primary SSN must not be the same as a Dependent SSN on another return	Paper file with cover letter. Get LITC involved if client returns due to an issue with this reject.	Site Coordinator
IND-046 or F1040-164-01	Form 8862 must be present in the return. e-File database indicates the taxpayer must file Form 8862 to Claim Earned Income Credit after disallowance.	Enter Form 8862	Site Coordinator
F1040A-336-01	If Form 1040A, Line 2 checkbox "Married filing jointly" is not checked (element 'IndividualReturnFilingStatusCd' does not have the value 2) and 'PrimaryDeathDt' has a value and Line 48a 'RefundAmt' has a non-zero value, then Form 1310 must be present in the return.	Enter Form 1310	Site Coordinator
IND-901	Primary SSN locked because taxpayer is deceased	Paper file.	Site Coordinator
IND-931-01	Dependent SSN is locked because the person is deceased.	Paper file.	Site Coordinator

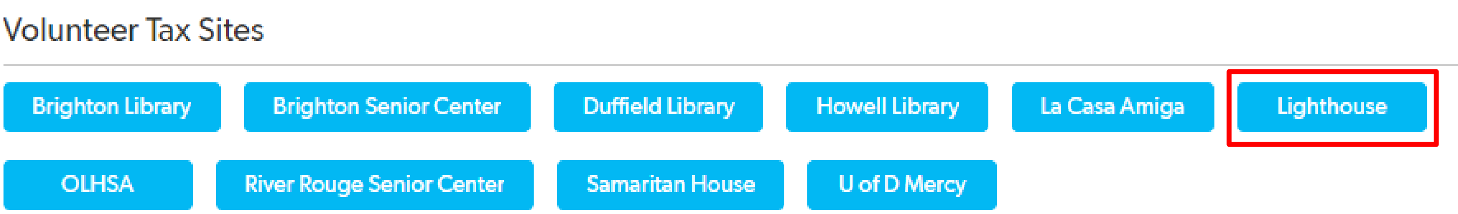
IND-941-01	Spouse SSN is locked because the person is deceased.	Paper file.	Site Coordinator
IND-517-01	Dependent filed as Primary	If dependent should be a dependent, paper file with supporting documents; advise dependent to amend. If the dependent is entitled to file as primary, remove this person and re-efile.	Site Coordinator
IND-518-01	Spouse claimed elsewhere as a Dependent	Paper file with cover letter. Get LITC involved if client returns due to an issue with this reject.	Site Coordinator
R0000-544-02	Primary claimed as a Dependent	If taxpayer is claimed on another's return fraudulently, paper file with cover letter. Get LITC involved if client returns due to an issue with this reject.	Site Coordinator
		If the taxpayer is claimed correctly as a dependent on parents' return, check the "I am a dependent" box & re-efile.	Site Coordinator
IND-508-01 IND-511-01	Primary SSN is the same as a Spouse SSN on another return	This is often a case of one spouse filing MFJ and the other Single, MFS or HOH.	Site Coordinator
R0000-500-01	'PrimarySSN' and 'PrimaryNameControlTxt' in the Return Header must match the e-File database.	Name or SSN/ITIN was entered incorrectly, contact client to get the correct name/number and resubmit	Site Coordinator
R0000-503-02	'SpouseSSN' and the 'SpouseNameControlTxt' in the Return Header (or Line 6b 'ExemptSpouseNameControlTxt' in the return - For 1040/1040A returns) must match the e-File database.	Name or SSN/ITIN was entered incorrectly, contact client to get the correct name/number and resubmit	Site Coordinator

R0000-504-02 SEIC-F1040-535-04	Each 'DependentSSN' and the corresponding 'DependentNameControlTxt' that has a value on Line 6c(2) of the return, must match the SSN and Name Control in the e-File database.	Name or SSN/ITIN was entered incorrectly, contact client to get the correct name/number and resubmit	Site Coordinator
IND-180-01 IND-181-01 For spouse: IND-183-01 For dependent: IND-996	Primary taxpayer's Identity Protection Personal Identification Number (IP PIN) must match the e-File database. Please double check your entry and resubmit your return with the correct number.	No IPPIN or wrong IPPIN. These are easy to fix. Ask the client if they got a letter from the IRS in January with the IPPIN. If not, try to have the client get their IP PIN online by going to this website and creating an account. If they cannot do that, have them call 800-908-4490 to have a new one mailed to them.	Site Coordinator
F1040-428-01 F1040-429-01 S-F1040-147	The e-File database indicates a First Time Homebuyer Installment Payment is due for the Primary SSN. Include amount on Line 60b, 'FirstTimeHmByrRepaymentAmt' of Form 1040 and attach Form 5405 if required.	Client likely bought a home in 2008, must fill out form 5405. Contact the client to verify that they purchased a home in 2008. Visit the 1st time homebuyer look-up website, and go through the prompts asking the client questions as needed. This will change the amount, so the client should return and sign the new return and then it can be retransmitted.	Site Coordinator
FW2-502	Form W-2, Line B 'EmployerEIN' must match data in the eFile database.	Most likely an error entering the EIN, call client for correct EIN, fix mistake and retransmit	Site Coordinator
FW2G-502	Form W-2G, 'PayerEIN' must match data in the e-File database.	Most likely an error entering the EIN, call client for correct EIN, fix mistake and retransmit	Site Coordinator
F1099R-502-02	Form 1099-R, 'PayerEIN' must match data in the e-File database.	Most likely an error entering the EIN, call client for correct EIN, fix mistake and retransmit	Site Coordinator

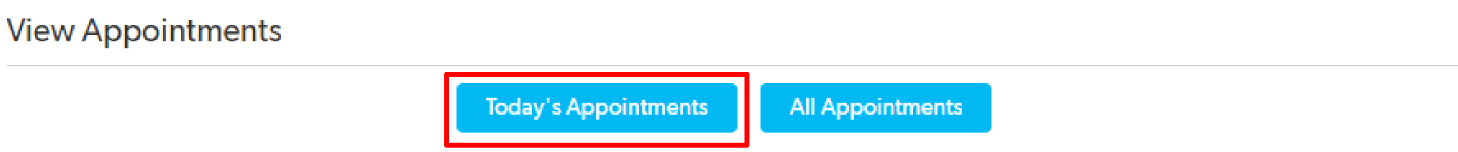
FW2-505-01	Employer EIN issued after Tax Year of return	Most likely an error on the employer's part. Have the client ask the employer for a corrected W2.	Site Coordinator
R0000-093-02	If Spouse SSN in the return has a value, then it must be within the valid range of SSN/ITIN and must not be an ATIN.	Usually MFS when we do not have the spouse SSN, these must be paper filed.	Site Coordinator
F1040A-056-02 F1040-065-04	At least one of the following must have a non-zero value: Form 1040A, Line 15 'TotalIncomeAmt' or Line 21 'AdjustedGrossIncomeAmt' or Line 28 'TaxAmt' or Line 30 'TotalTaxBeforeCrAndOthTaxesAmt' or Line 36 'TotalCreditsAmt' or Line 39 'TotalTaxAmt' or Line 46 'TotalPaymentsAmt'.	Forgot to add the $1 to e-file. Add the $1 and retransmit	Site Coordinator
IND-158-01	No EIC is permitted if there are no Qualifying Children and taxpayer is outside the age range	Remove any EIC claim indications. This will change the refund or amount due, so the client should return and sign the new return and then it can be retransmitted.	Site Coordinator
201 (State of Michigan code)	Taxable value of property is zero or blank.	Put in the correct taxable value. If this changes the refund or amount due, ask the client to return and sign the new 8879. Retransmit.	Site Coordinator

Finding your appointments for the day

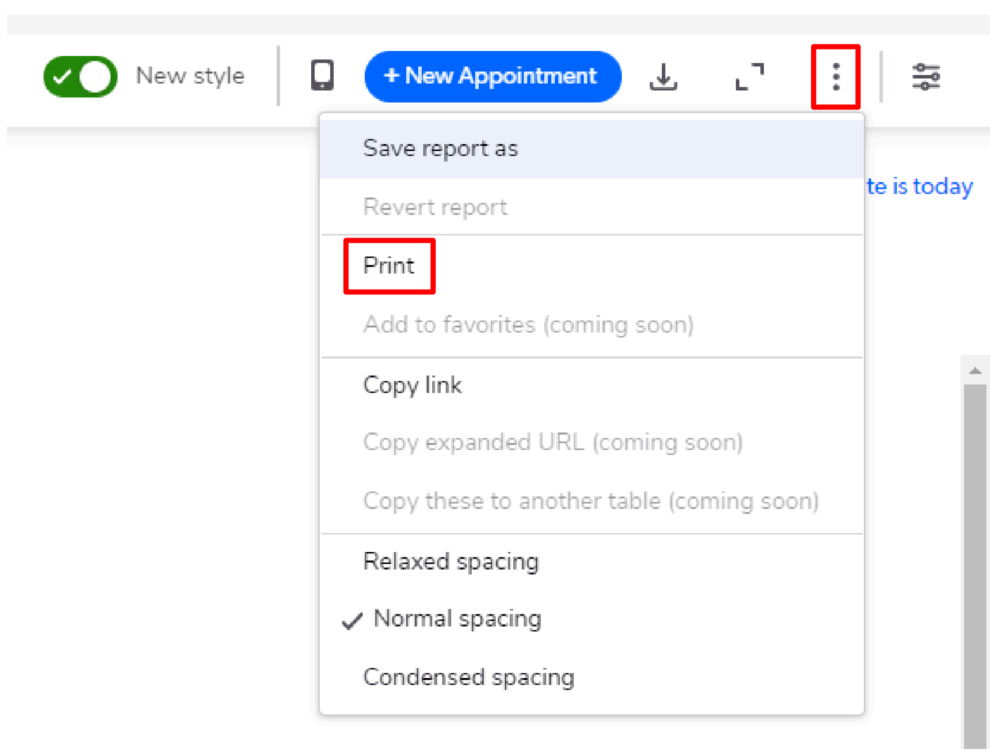
1. On your homepage, click on the site you are looking for under “**Volunteer Tax Sites**”



2. Click on “**Today’s Appointments**” under the “**View Appointments**” section on the right of your site's homepage.



3. A list of your appointments, whether they are reserved or open, will show up. This report can be printed by clicking on the three vertical dots in the top left corner, then clicking on “**Print**”



Adding an appointment for a walk in

Please only **add an appointment** if all of your appointments for the day are full. If you have open appointments, please add your walk in client to your open appointments first.

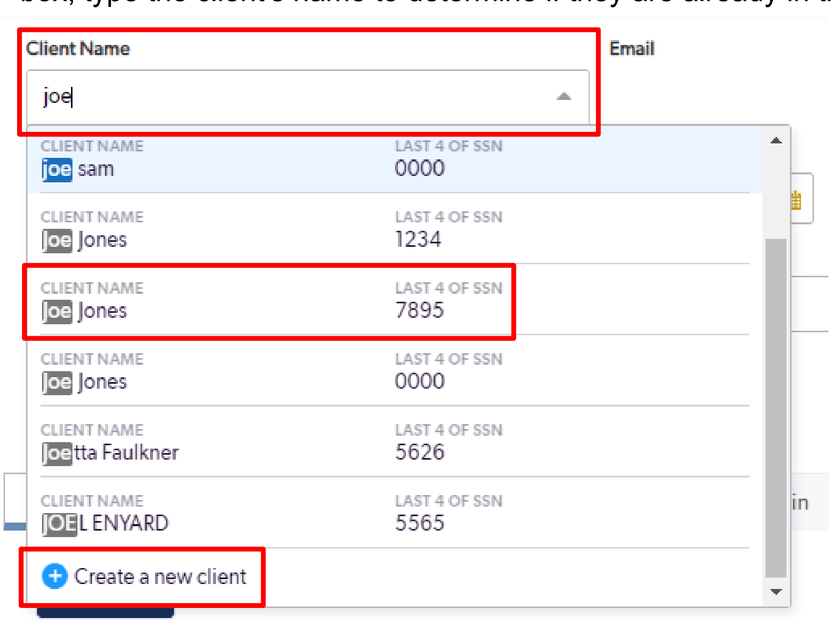
	Location	Schedule Date	Start Time ↑	Client Name	Client - Last 4 of SSN	Mobile Phone	Status
02-04-2023 (16 appointments)							
	Howell Library	02-04-2023	10:00 am				Reserved
	Howell Library	02-04-2023	10:00 am				Open
	Howell Library	02-04-2023	10:00 am				Open
	Howell Library	02-04-2023	10:00 am				Open
	Howell Library	02-04-2023	11:15 am				Reserved
	Howell Library	02-04-2023	11:15 am				Reserved
	Howell Library	02-04-2023	11:15 am				Open
	Howell Library	02-04-2023	11:15 am				Reserved

If you have open appointments

1. Look at your appointment schedule to determine if you have open appointments. If you have an open appointment, click on the pencil icon to the left of the open appointment.

	Brighton Senior Center	02-14-2023	9:00 am				Open

2. In the "**Client Name**" box, type the client's name to determine if they are already in the system as a client.

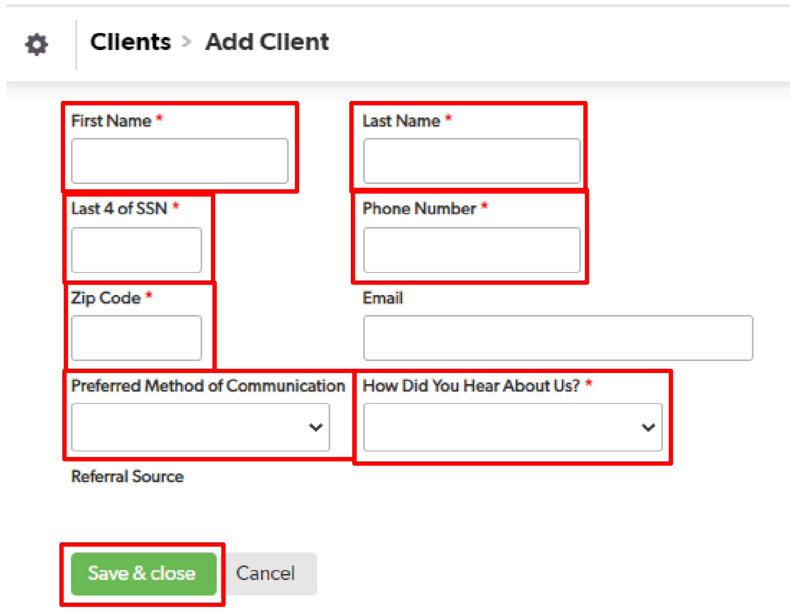


3. If the client is already in the system, click on the client's name in the drop down box. Be sure to check the last four of the SSN to make sure it is them.

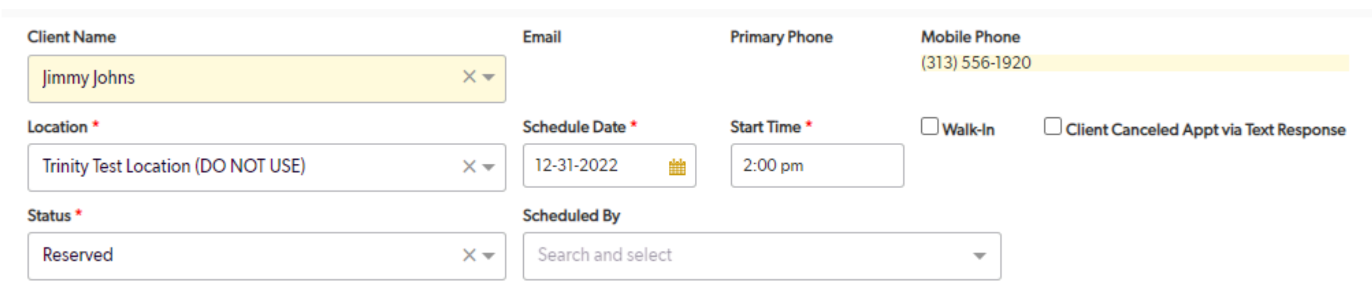
4. If the client is not already in the system, click on "**Create a new client**".

5. An "**Add Client**" screen will pop up. Enter the clients first and last name, last four of their social security number, mobile phone number, zip code, email (if they have one), their preferred method of communication, and how they heard about us.

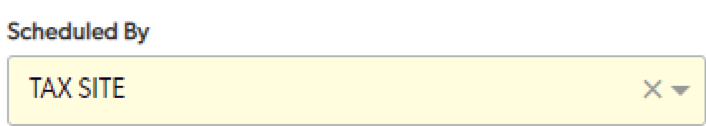
6. Click on "**Save & close**"



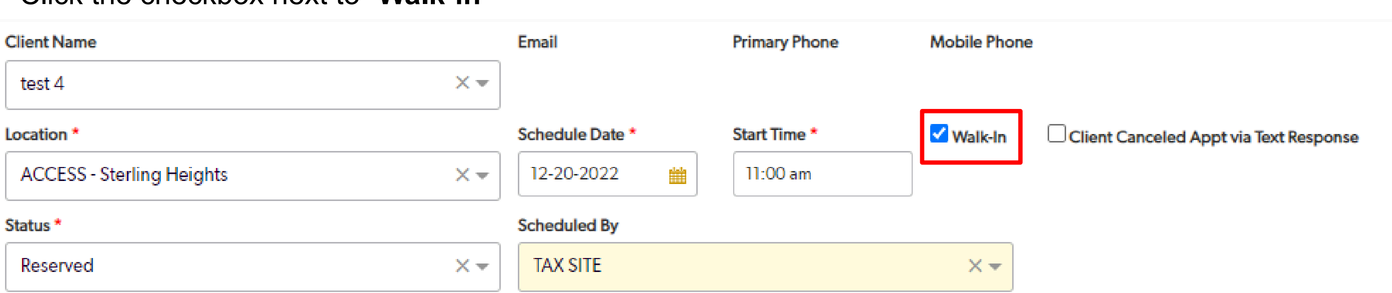
7. The clients entered information will then automatically populate into the appointment information as so:



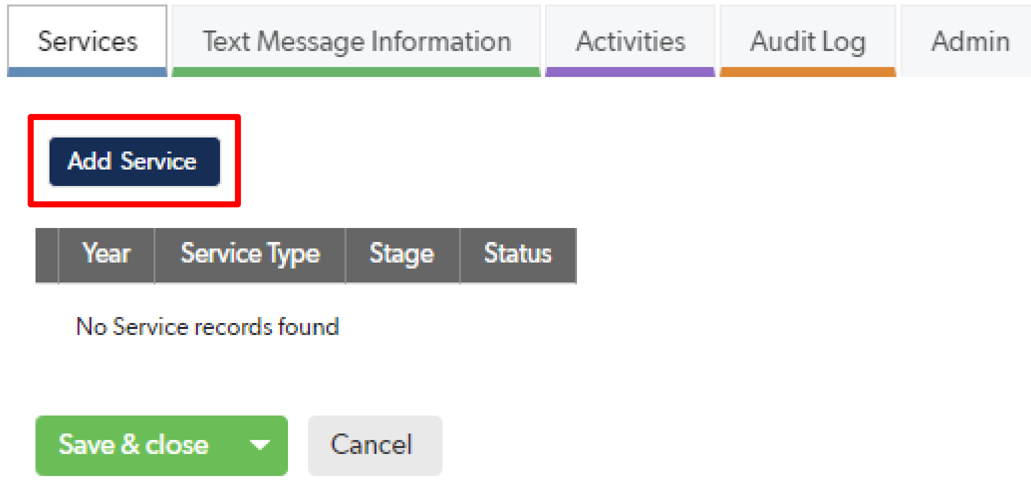
8. Click on the "**Scheduled By**" drop down, and select "**TAX SITE**"



9. Click the checkbox next to "**Walk-in**"

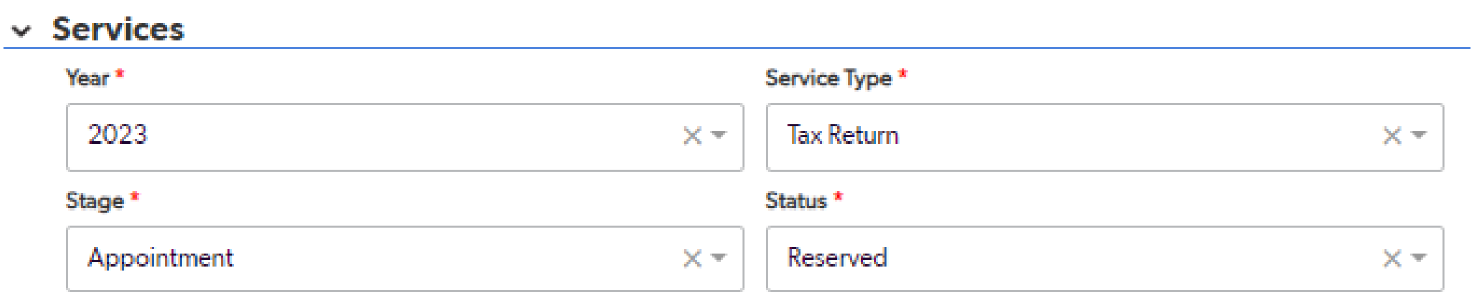


10. Scroll down to the “**Services**” section and click on “**Add Service**”. All appointments in Quickbase **MUST** have a service.

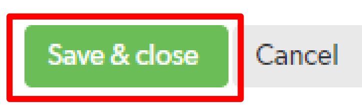


11. When the “**Add Service**” screen pops up, select the following from each drop down box:

Year: **Applicable Year** Service Type: **Tax Return** Stage: **Applicable Stage** Status: **Applicable Status**

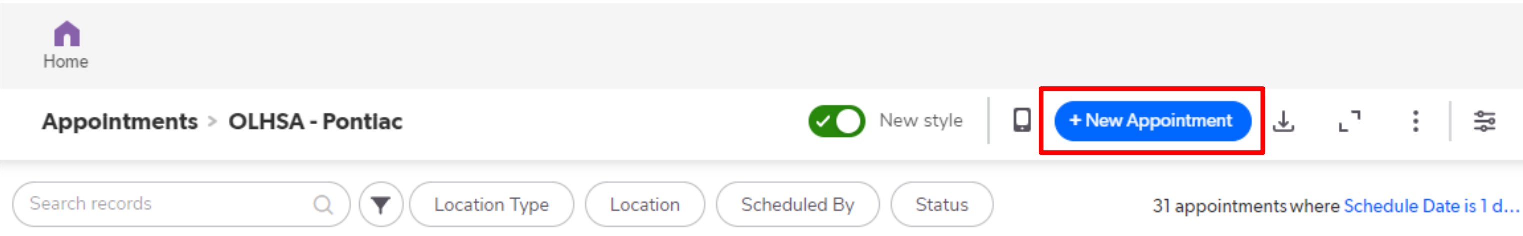


12. Click “**Save & close**” to save the service, and then “**Save & close**” again to save the appointment.

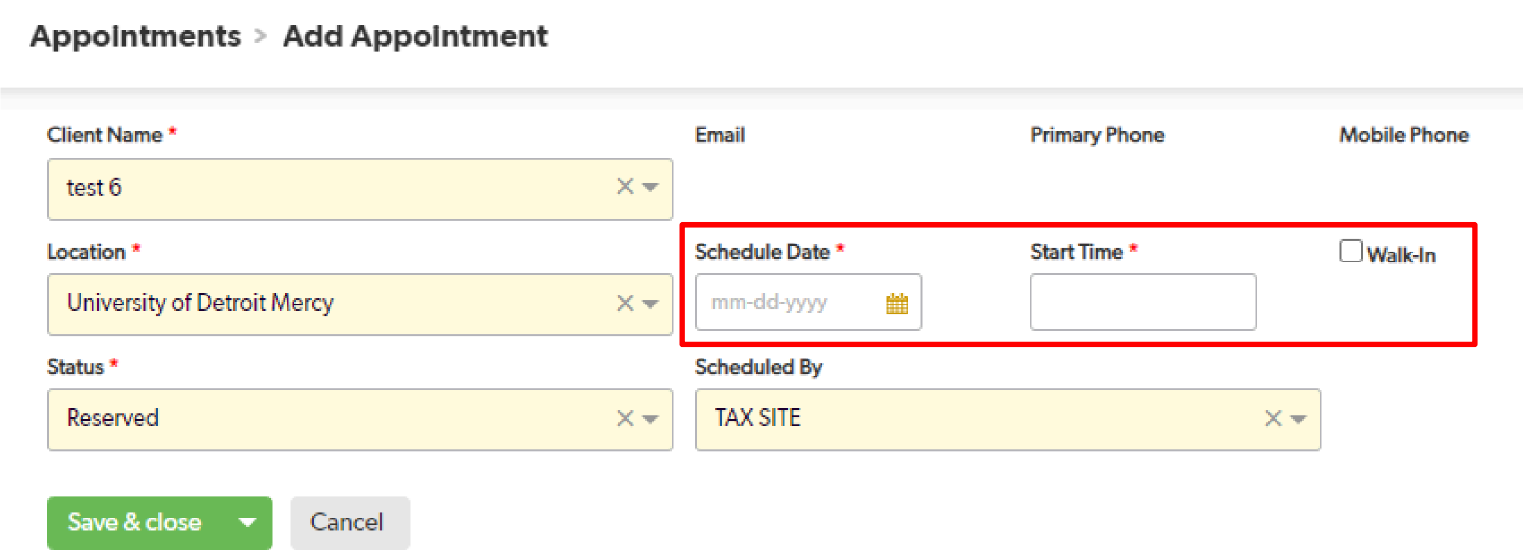


If you don't have open appointments

13. If you don't have any open appointments, on your "**Today's Appointments**" page, click on the blue "**New Appointment**" button on the right.



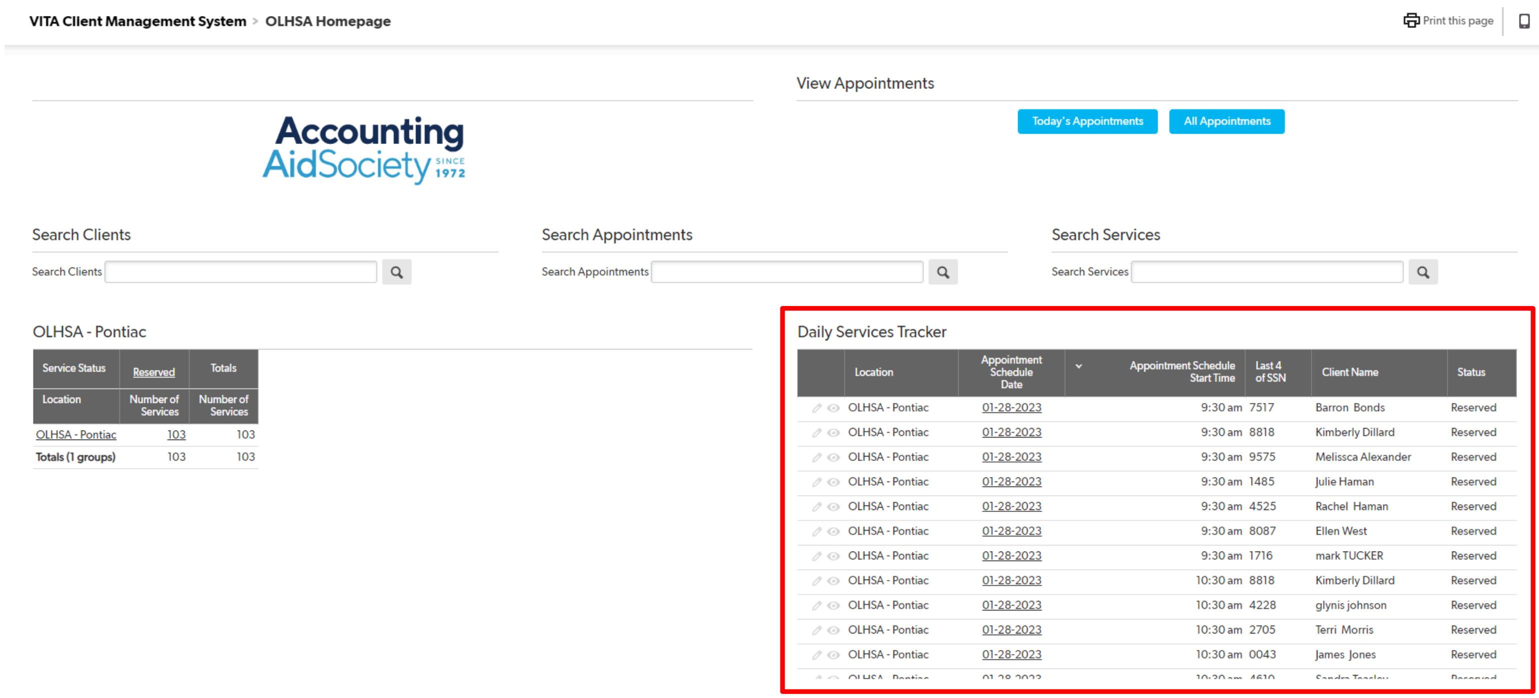
14. Follow steps 2 through 6 above to add the client to your appointment. The client's name should then pop up in the "**Client Name**" box.
15. Click on the "**Location**" box and select your tax site.
16. Click on the "**Status**" box and change it to "**Reserved**"
17. Click on the "**Scheduled By**" box and select "**TAX SITE**"
18. Click on the "**Schedule Date**" and select the date you're adding the appointment for.
19. Click on the "**Start Time**" box and enter the time appointment, or the nearest appointment time to when the client arrived.
20. Click the checkbox next to "**Walk-in**"



21. Click "**Save & close**"
22. Follow steps 10 through 12 above to add the service to the appointment.

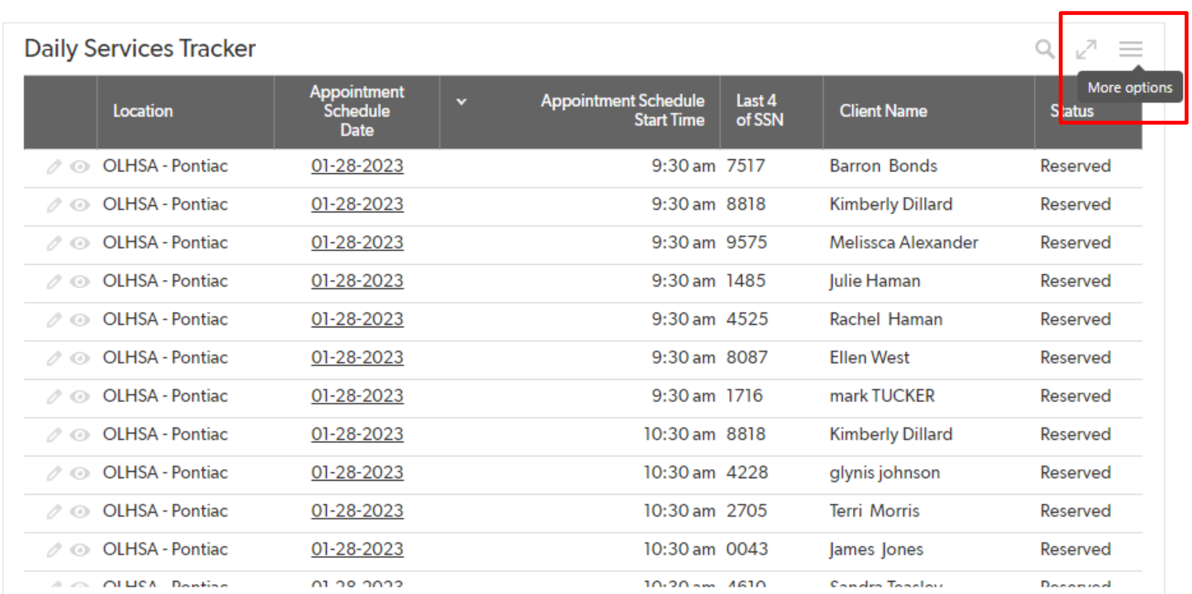
Changing service statuses

On the bottom right of your tax site's homepage, you have a report named "**Daily Services Tracker**" that shows all of the services for the current day. When you get to the site in the morning, all of the statuses should say "**Reserved**". These statuses need to be changed out of "**Reserved**" by the end of the day.

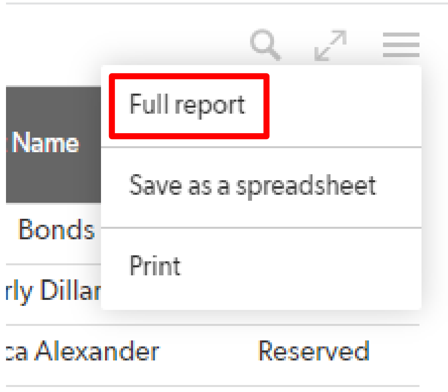


To change the status of a service:

1. **To make it easier**: Hover over the top right corner of the "**Daily Services Tracker**" report and click on the three horizontal lines to expand the report.

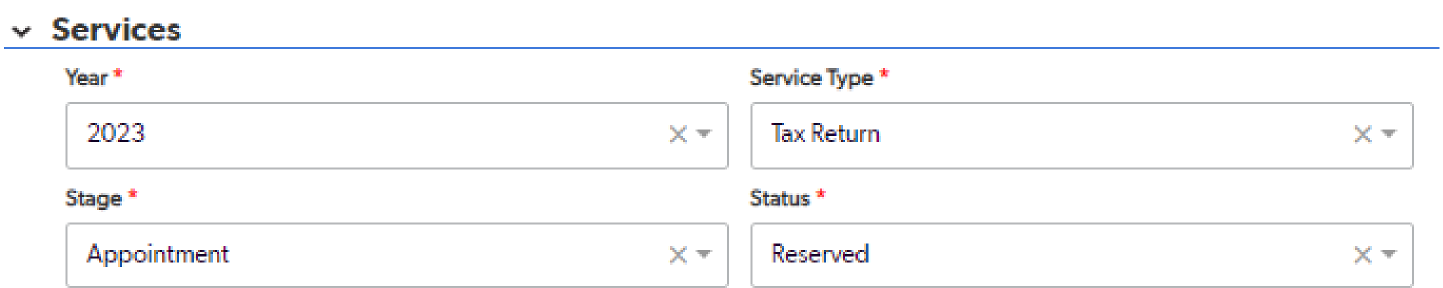


2. Click on “**Full Report**” and the report will open full screen.



3. Either on the homepage “**Daily Services Tracker**” or the full screen full report, click on the pencil icon for the service you want to change the status of.

4. Under the “**Services**” section, change the stage and status to the applicable option. See the [Status Explanations] section above for an explanation of each status.

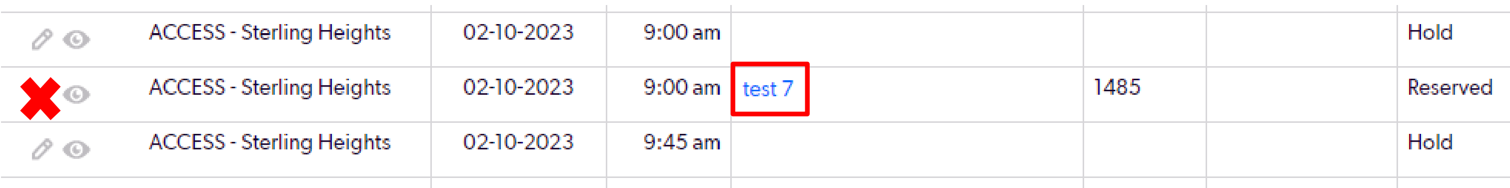


5. Click “**Save & close**” and it will return you to the list of all services for the day.

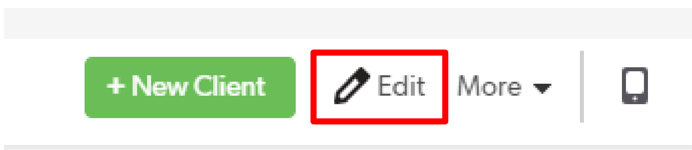
Editing client information

Please try to update any incorrect information for a client in Quickbase. If you see a client with a "false" last four of their social security number, or wrong phone number, please edit it using the directions below.

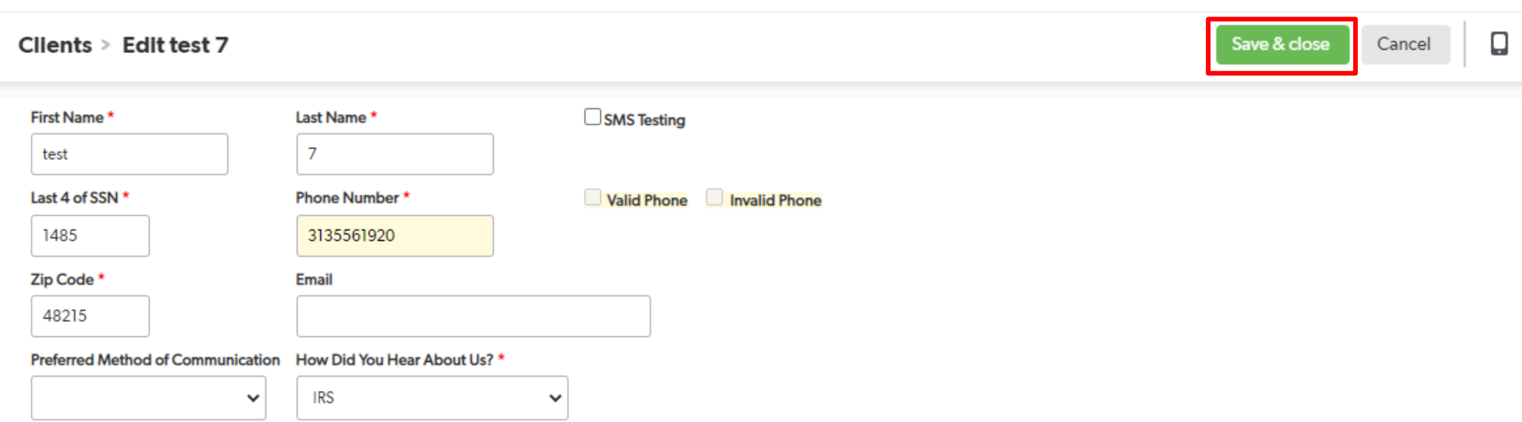
1. If you need to change any information entered for a client, like their phone number, email address, etc., find the client in the list of all appointments scheduled for your site and click on their name. It should be blue. Do not click on the pencil icon.



2. In the top right corner, click on "**Edit**" next to a pencil icon.



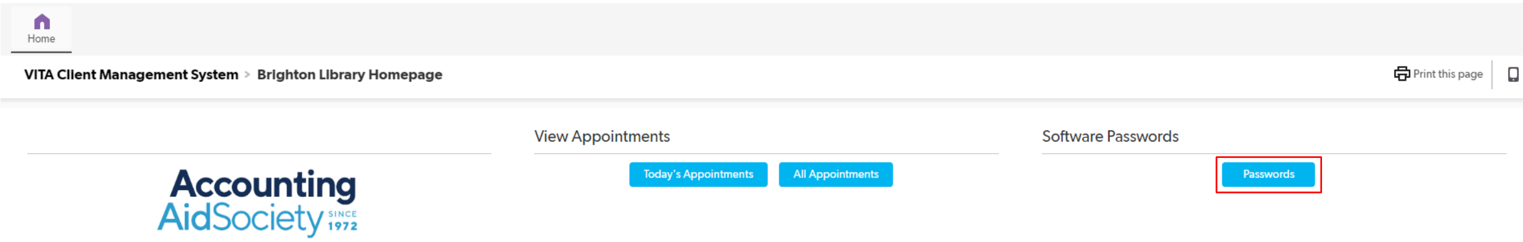
3. Edit the information that needs to be fixed and then click "**Save & close**" in the top right. **DO NOT** edit anything below what is shown here.



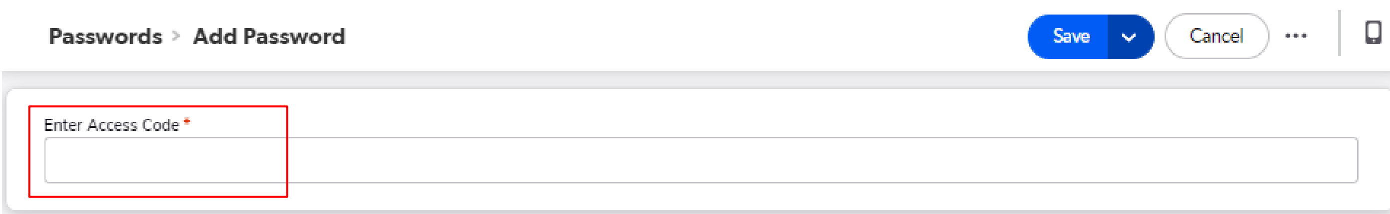
Finding Site Passwords

To find your site's software passwords in Quickbase, follow these steps:

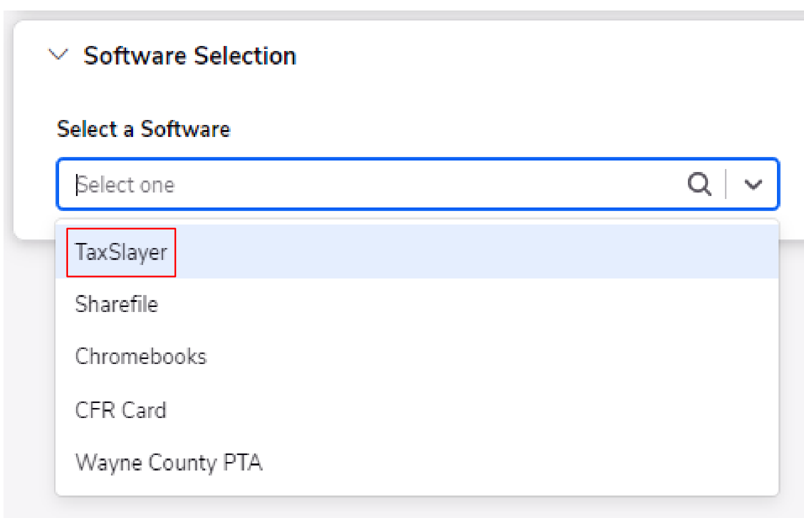
1. On your site's homepage, find the "Passwords" button on the right side of the page and click on it.



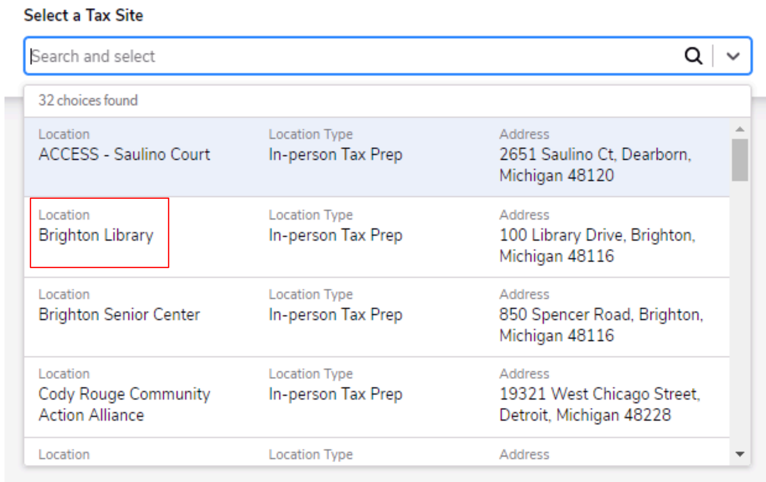
2. In the "Enter Access Code" box, enter the access code and then click out of the box. Pressing enter will not do anything.



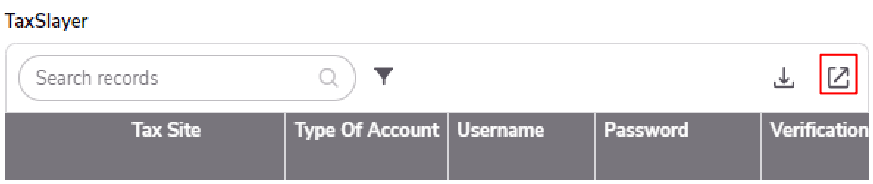
3. Select the software you need a password for.



4. Select your tax site.

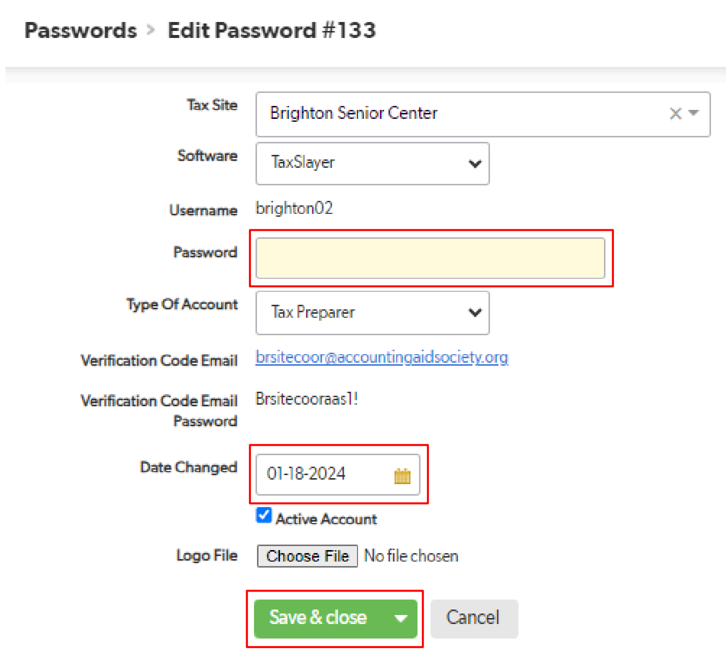


5. To expand the report, click on the square with an arrow in it.



6. If you need to change a password due to the software requiring you to, click on the pencil icon next to the user.

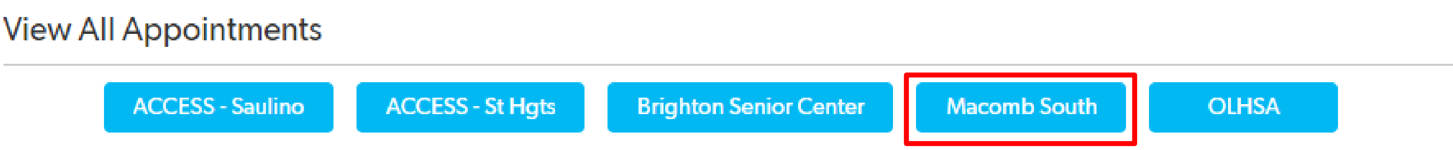
7. Enter the new password and update the “Date Changed” box, then click “Save & close”



LOCATION USERS

Scheduling an appointment for a client

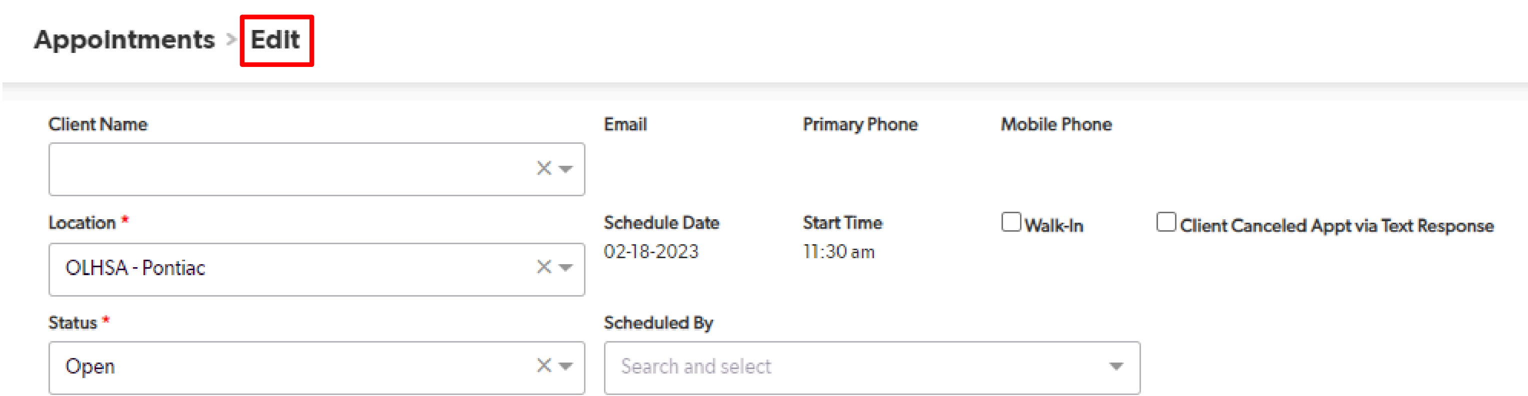
1. To schedule an appointment for someone, first click on the appropriate location that you are scheduling for on your homepage.



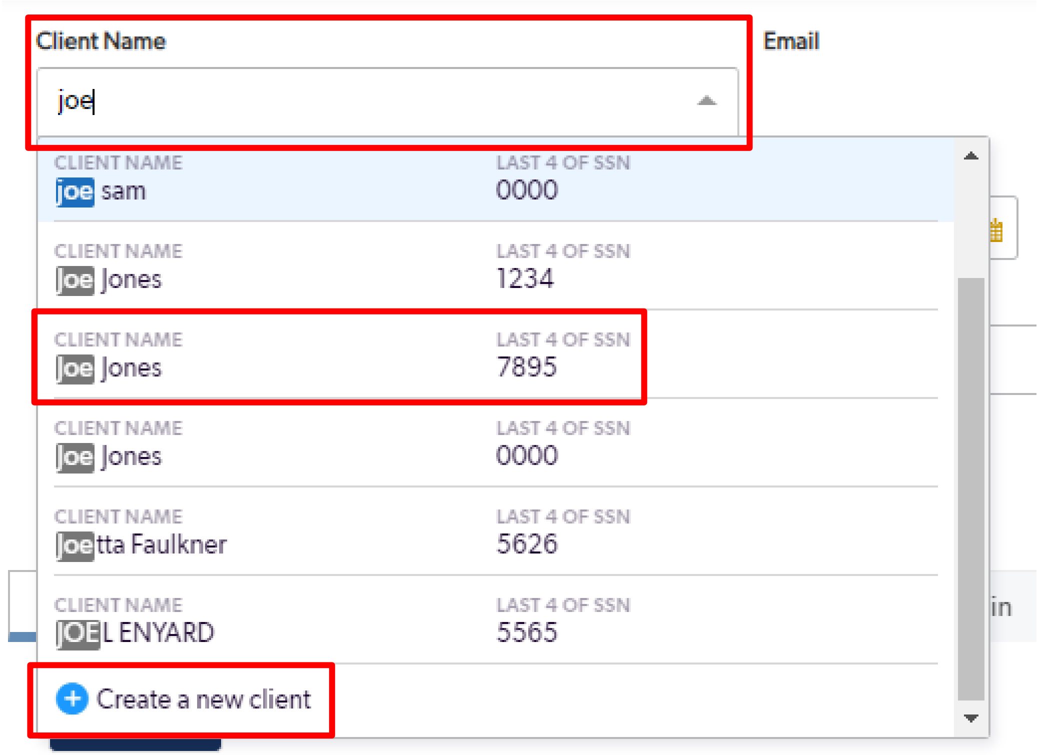
2. Find the applicable date and time the client would like and click on the pencil icon to the left of the appointment.

	OLHSA - Pontiac	02-18-2023	11:30 am				Open
	OLHSA - Pontiac	02-18-2023	11:30 am				Open
	OLHSA - Pontiac	02-18-2023	12:30 pm				Open
	OLHSA - Pontiac	02-18-2023	12:30 pm				Open
	OLHSA - Pontiac	02-18-2023	12:30 pm				Open

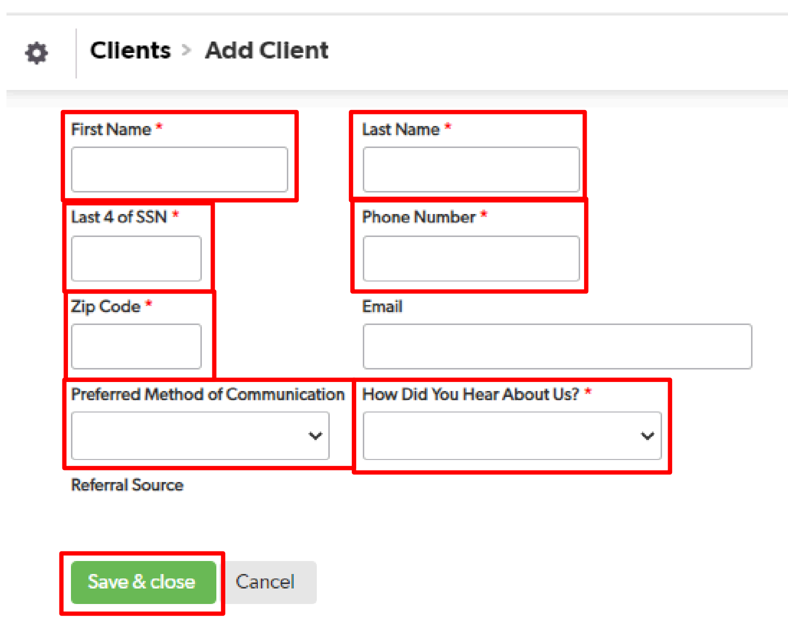
3. The "**Edit Appointment**" screen will pop up.



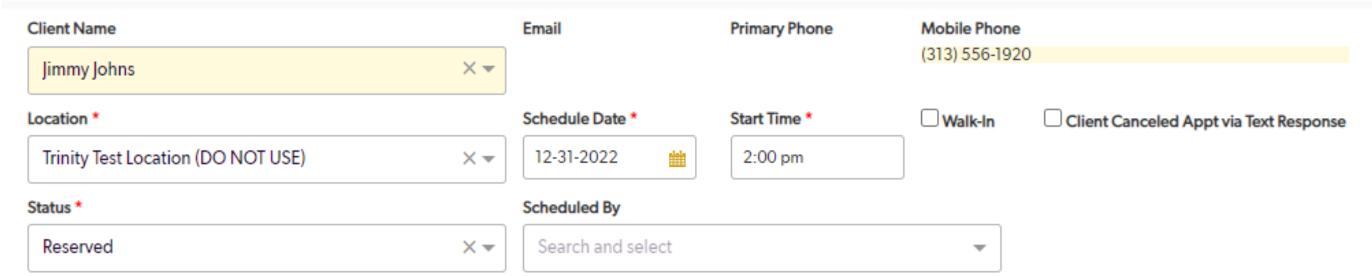
4. In the “**Client Name**” box, type the client's name to determine if they are already in the system as a client.



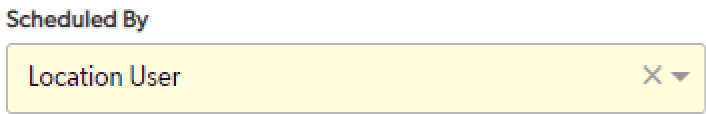
5. If the client is already in the system, click on the client’s name in the drop down box. Be sure to check the last four of the SSN to make sure it is them.
6. If the client is not already in the system, click on “**Create a new client**”.
7. An “**Add Client**” screen will pop up. Enter the clients first and last name, last four of their social security number, mobile phone number, zip code, email (if they have one), their preferred method of communication, and how they heard about us.
8. Click on “**Save & close**”



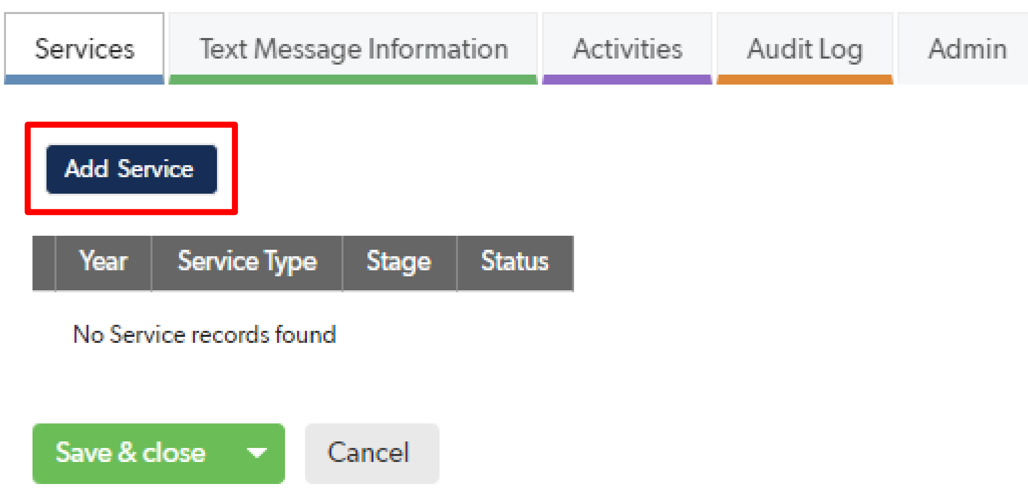
9. The clients entered information will then automatically populate into the appointment information as so:



10. Click on the "**Scheduled By**" drop down, and select "**Location User**"

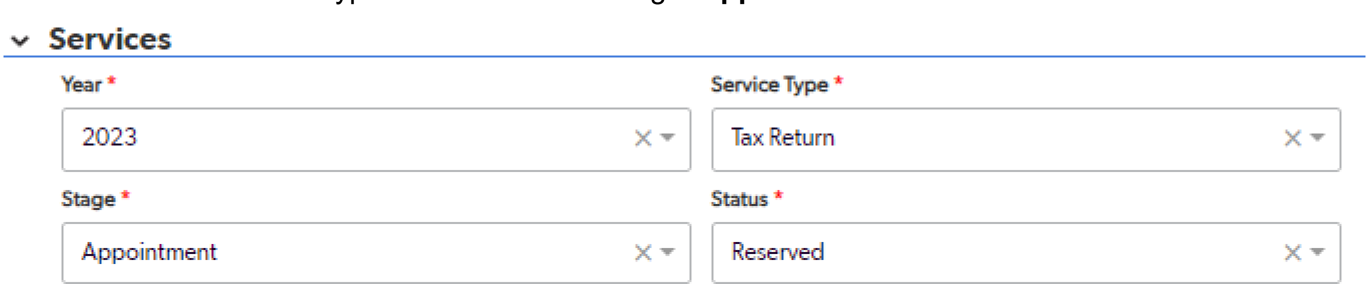


11. Scroll down to the "**Services**" section and click on "**Add Service**".



12. When the "**Add Service**" screen pops up, select the following from each drop down box:

Year: **2023** Service Type: **Tax Return** Stage: **Appointment** Status: **Reserved**



13. Click "**Save & close**" to save the service, and then "**Save & close**" again to save the appointment.

IMPORTANT: When you return to the screen that shows all of your appointments, unless multiple years were added for a client, the "# of Services" column MUST say "1" for every appointment scheduled. If they do not have a "1" in that column, follow steps 2, and 11 through 13 to add the service.

1 Appointment | **Some field** contains *'test'* AND ...

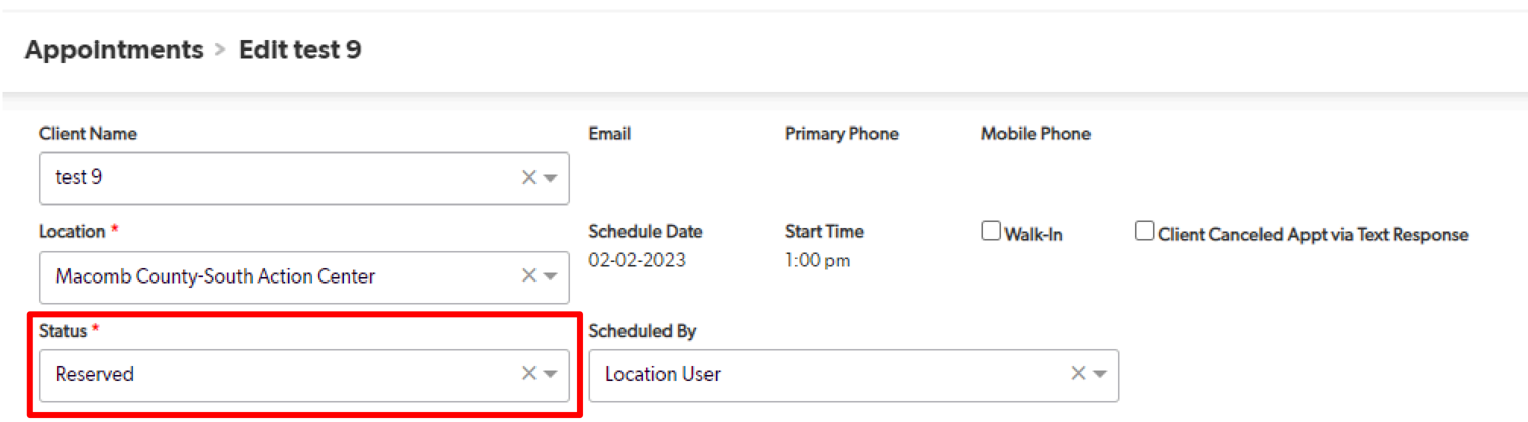
	Location	Schedule Date	Start Time	Client Name	Client - Last 4 of SSN	Mobile Phone	Status	# of Services
02-06-2023 (1 Appointment)								
	Macomb County-South Action Center	02-06-2023	2:00 pm	test 8	1452	(313) 556-1920	Reserved	1

Cancelling an appointment for a client

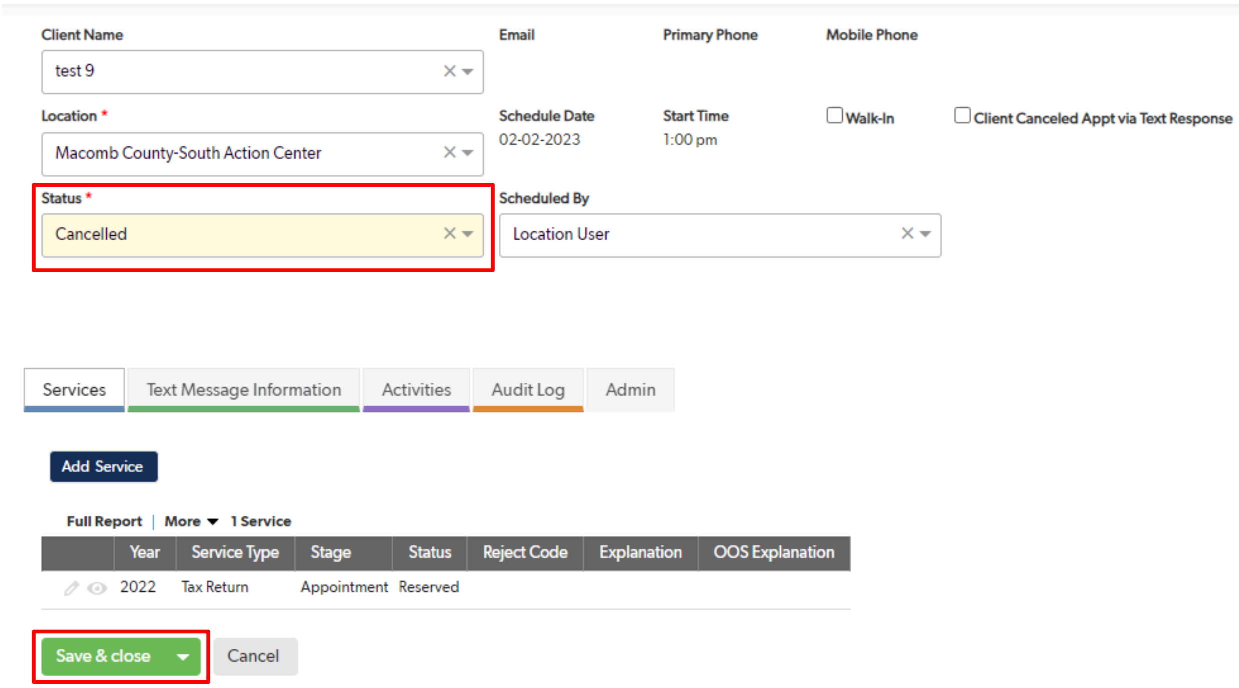
1. To cancel an appointment for a client, find the client in the list of all appointments scheduled for your location and click on the pencil icon on the left of the appointment.

	Macomb County-South Action Center	02-02-2023	1:00 pm			Hold	0
	Macomb County-South Action Center	02-02-2023	1:00 pm			Hold	0
	Macomb County-South Action Center	02-02-2023	1:00 pm	test 9	1450	Reserved	1
	Macomb County-South Action Center	02-02-2023	2:00 pm			Hold	0
	Macomb County-South Action Center	02-02-2023	2:00 pm			Hold	0

2. On the "**Edit Appointment**" page, click on the status box that says "**Reserved**" and change it to "**Cancelled**"

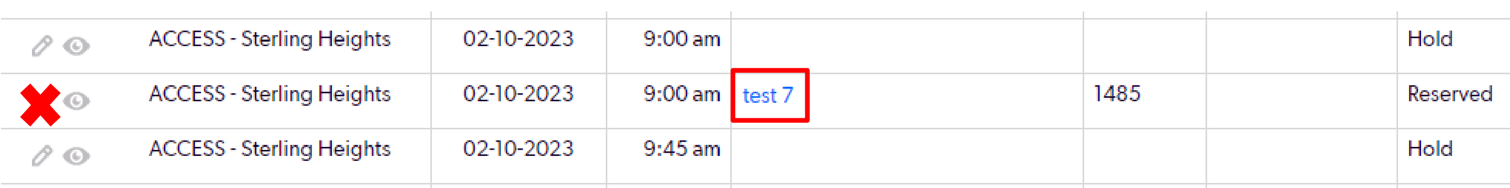


3. Once the appointment status is changed to “**Cancelled**”, click on “**Save & close**”. **DO NOT** edit anything else on this screen. **Leave the service as 2022 Tax Return Appointment Reserved.** The system will automatically change the service status to cancelled and open a new appointment for you to fill.

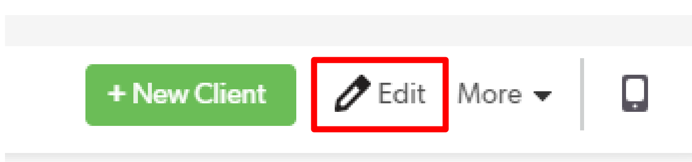


Editing client information

4. If you need to change any information entered for a client, like their phone number, email address, etc., find the client in the list of all appointments scheduled for your location and click on their name. It should be blue. Do not click on the pencil icon.



5. In the top right corner, click on “**Edit**” next to a pencil icon.



6. Edit the information that needs to be fixed and then click “**Save & close**” in the top right. **DO NOT** edit anything below what is shown here.