



VITA Site Web Scheduling System Users Reference Guide

VITA Web Scheduling System URL: <http://www.taxvolunteer.org>

**To access the VITA Web Scheduling System you must first be issued a *User Name* and *Password*. These may be entered into the system by an approved VITA Site Coordinator who has authorized user access rights and permissions to add new users to the system.

MANAGING USERS

To manage users select the *Manage Users* option from the Main Menu. To add a New User to the system highlight the *New User* listing and then click *View*. Assign a User name and password and enter the necessary information for the new user and click *Save*. **You must save the user information first before assigning a site, group or being able to set up their schedule.** To set up the schedule for a VITA volunteer select the *View Schedule* option. To add a schedule, select the *Add Work Period* option. Add the day and time for each work period the volunteer will be working at the site. The Interval field is the estimated length of time for each appointment (example: 30=30 minutes, 60=60 minutes, 90=90 minutes).

MANAGING SITES

To manage sites select the *Manage Sites* option from the Main Menu. Only users with administrative access permissions may be able to add/edit/delete sites. When adding sites you must enter the contact information (address, city, state, zip, telephone). You may select what kind of site it is (211, VITA, AARP). If the site accepts appointment select the *Yes* option. If the site has Spanish speaking volunteers you may select the *Yes* option. **To activate the site you must select the Yes option.** You may deactivate a site by simply selecting the *No* option. This will remove the site from the Site list so no further appointments will be scheduled at the site.

LOCATING SITES

Click on the *Find Sites* option to see a full view list of all of the VITA Sites. Users may only schedule appointments at Sites which have the appointment option activated. You may sort the list by clicking on the column header for each column.

SCHEDULING APPOINTMENTS

To schedule an appointment select *Find Sites* from the Main Menu. Locate the Site nearest to the client. If the Site accepts appointments select *Yes*. Select from the days available option by selecting the volunteer name on the date available. Select the time of the appointment and enter the necessary client information.

MANAGING APPOINTMENTS

To access the appointment calendar select the *My Appointments* option in the Calendars section on the Main Menu. The length of appointments may be customized

MESSAGE CENTER

Updates, system enhancements, reminders and important information may be posted in this section of the Main Menu.

TECHNICAL SUPPORT

801-656-1600 | 801-891-7775(after hours) | support@faircredit.org