

SCHEDULERS FAQ

- **What are Intake Packets and where do I get one?** - the Intake Packet is an information document required by AARP TaxAide. It is a form that the Taxpayer (TP) must complete before our counselors can complete the taxpayers taxes. It can also be printed from <https://www.nvtaxaide.org/taxpayer-information> then filled out and brought to the TP appointment.
- **When and how do I use the Archive feature in Voice/Call?** – You will not need to go into the Archive folder, but you will use it to move calls that have questions or problems which you have forwarded to a scheduler coordinator to handle.
- **The TP wanted a certain location and date. I started the appointment and when I tried to confirm, TaxAide Registration pops up a message that says “UNAVAILABLE”. What do I do?** – Sometimes more than one person is trying to schedule an appointment. It could be another scheduler on one of the other number/sites or a TP making an appointment online. Whoever hits the “confirm” button first will get the appointment. In this case, just inform the TP that the appointment date/time is no longer available and search for a new date/time that meets their needs. You will have to set up a new appointment for the TP.
- **TP says they have an appointment scheduled, but I cannot find it.** – If the TP says they have an appointment, go to “TaxAide Registration”, click on any site, scroll down to “Edit/Cancel Appointment”, confirm the telephone number, then confirm the spelling of the TP’s last name. If no appointment appears, reschedule the appointment.
- **The TP was asking questions that are NOT covered in my flow chart/script. How do I handle this?** – We are NOT tax counselors. We CAN NOT answer detailed tax questions. Simply tell the TP that you are not qualified to answer the question and that they can ask the counselor when they go for their tax appointment.
- **TP says they need to file multiple tax years, how do I do this?** – AARP TaxAide can only file 3 years back PLUS the current year, 2025. You will need to schedule **SEPARATE** appointments for each year, at the same site. Use the following example:

East LV Library

2025 taxes – Smith, Freida 702-222-2224, February 15, 11:00am

2024 taxes – Smith2024, Freida 702-222-2224, February 15, 11:30am

2023 taxes – Smith2023, Freida 702-222-2224, February 15, 12:00PM

2022 taxes – Smith2022, Freida 702-222-2224, February 15, 12:30PM

THEN, in the **NOTES** of each appointment indicate Multiple Filing.

- **I have a call that is in Spanish. I do not speak Spanish; how do I handle this call?** – Not all our schedulers or sites can communicate with people whose first language is not English. **WE DO HAVE SOME SITES, HOWEVER, THAT CAN ASSIST SPANISH SPEAKING AND A FEW OTHER LANGUAGES.** Check the spreadsheet named “Site Language Interpreters” to see which sites can help with interpretation.

1. You can also use an online translation platform on the bookmark (Google Spanish-English translator). Just copy the message then go to the Google search bar and type in “Spanish to English.” When the page pops up, paste what you copied into the “enter text” box on the left side and you will see the translated text in English on the right side. You can use this sample to text the TP.

English:

This is AARP Taxaide, returning your call. If you want an appointment to do your taxes we will need your full name, phone number and email address, if you have one. We need to know which location you wish to go to and what days are best for you. Also, do you need an interpreter? Please contact us at XXX-XXX-XXXX by text so we can assist you with scheduling your tax appointment.

Spanish:

Soy AARP Taxaide, le devolvemos la llamada. Si desea una cita para hacer sus impuestos, necesitaremos su nombre completo, número de teléfono y una dirección de correo electrónico, si la tiene. Necesitamos saber a qué lugar desea ir y qué días son mejores para usted. Además, ¿necesitas Un intérprete? Comuníquese con nosotros al XXX-XXX-XXXX por mensaje de texto para que podamos ayudarlo a programar su cita de impuestos.

2. You can always call or text one of the Scheduling Coordinators, and tell them about the call. Then move the call into the archive folder. The coordinator that you contact will take care of the call.
- **My TP does not have email. How do I confirm their appointment?** – Ask if Your TP has a cell phone and if they can receive text messages. Select the entire confirmation. Hold your left mouse button down from the top of the form and drag the mouse to the bottom of the form then right click the mouse button and select copy. Go to the Voice-Calls tab where you have the call from the TP. Click on the text box to the right of the TP telephone number. Paste the confirmation into the “type a message” box at the bottom of the screen and press the send key  on the right side of the message. Ask the TP if they received the text message. Now you can delete the call.

Unusual Situations:

- **I had a taxpayer (TP) on the line and when I tried to open the TaxAide Registration Site bookmark I lost the call. What happened and what do I do?** - Sometimes we “override” a bookmark that we have open. That means that you were on one bookmark, Voice - Calls, and you clicked on a different bookmark WITHOUT opening a new tab. If you do this, you will lose the call. If this happens, be sure you are in the Voice – Calls bookmark then call the TP back. Apologize by saying there was a computer glitch and get on with making the appointment. Now **BE SURE** you open a new **TAB** for each bookmark that you want opened (Voice-Calls, TaxAide Registration, Calendar, ZM Site Locations). Just click on the + sign to the right of the tab you are on, and a new tab will open. Now click on the bookmark that you want to open in that tab.
- **I have a message from a “relay” person. They say they are calling for someone else who is hearing impaired. How do I handle this?** – This call can be handled like any other call. The relay system is a manual system that connects a hearing-impaired person with a relay person, and they type out questions and answers. First, call the relay number back and that person will attempt to call the hearing-impaired TP. Once connected you just talk normally, and the relay person types your responses to the TP. Try to get the TP cell phone number so you can text them a confirmation (as well as the email confirmation) and you will be able to communicate with them directly and not through the relay system. **BE SURE TO NOTIFY THE LC THAT THE TP IS HEARING IMPAIRED.** This can be done by texting the LC **AND** putting the information into the Notes on the scheduled appointment form. **ASK THE TP IF THEY HAVE AN INTERPRETER, OR IF THEY NEED ONE. NOT ALL SITES HAVE ASL INTERPRETERS SO THERE COULD BE COMMUNICATION PROBLEMS BETWEEN THE TP AND THE COUNSELOR.**