

Making An Appointment

From the [Our Sites](#) page of the TaxAide-Southbay.org website (www.taxaide-southbay.org/our-sites.html), click on the link to make an appointment at the desired site, and follow the procedure below.

On the "Tax-Aide Appointment Reservation" page for your selected site

1. Click "Make Appointment"
2. Click in the "Select Date" box and select the date you wish to make the appointment from the calendar
3. If appointments are not available on that date, a message will inform you of available dates before and after the date input. Click on the desired date
4. Select the desired appointment time from those available; then click the yellow "Make Appointment" button at the bottom of the page (may need to scroll down)
5. Enter the requested information; **first name, last name, email address, and phone number are required.**
6. Click the yellow "Review Appointment" button at the bottom of the page (may need to scroll down)
7. Verify the appointment time and that the information in the "Your Information" box is correct
8. Click the yellow "Confirm Information" button at the bottom of the page
9. A "Thank You!" confirmation screen will appear, listing your appointment information. Write down your Appointment Reference Number (AP-nnnnnnnn) that appears in the "Appointment Information" box. The screen also contains links to:
 - An AARP-provided list of documents to bring to your appointment (top)
 - An AARP-provided description of returns that we can prepare (bottom)
 - Reschedule your appointment or change the appointment information you entered (bottom)
 - Cancel the appointment (bottom)
10. The yellow "Print Receipt" button will allow you to print this appointment information page
11. Exit this screen by clicking "X" on your browser tab. Alternatively, clicking the yellow "Back to Site Locator" will take you to the Tax-Aide site locator, where you can search all Tax-Aide preparation sites by zip code

During the appointment revision process, the browser back and forward buttons are inoperative. Use the yellow "Back" button at the bottom of the screen to restart the process.

You will receive a confirmation email, and reminder emails 72 and 24 hours before your appointment.

If you are hesitant about making an appointment online, seek help from family or friends. They can assist you through the appointment-making process or make an appointment for you.

We can prepare only 1 return during an appointment. If you have multiple returns to be prepared (e.g. relative's return, prior year or amended returns), please make an appointment for each of the returns.