

## Rescheduling Your Appointment

If you cannot keep your original appointment, please reschedule or cancel it as far in advance as possible, in order to make it available to other taxpayers. **PLEASE DON'T BE A NO-SHOW!**

The steps to reschedule an appointment are the following:

1. Go to the [Our Sites](#) page of the TaxAide-Southbay.org website ([www.taxaide-southbay.org/our-sites.html](http://www.taxaide-southbay.org/our-sites.html))
2. Under the site where you made the original appointment, click on the line Click here to make an appointment in . . .
3. The "Tax-Aide Appointment Reservation" screen for that site will appear
4. Click on "Edit or Cancel Appointment"
5. Enter your appointment reference number (see your confirmation notice) or your phone number and last name
6. Click in the "Select Action" drop-down box and select "Edit"
7. Click the yellow "Search" button (may need to scroll down)
8. Click on your original appointment time that appears (may need to scroll down)
9. Verify your original appointment start time and date
10. To reschedule your appointment, click in the "Select Date" box and select the date you wish to make the new appointment from the calendar
11. Select the desired appointment time from those available; then click the yellow "Review Appointment" button at the bottom of the page (may need to scroll down)
12. The "Tax-Aide Appointment Reservation - Step 3 of 4" page will show the original appointment time at the top, the information (name, email, phone number, comments) that you entered for your original appointment (carried forward), and your selected new appointment time at the bottom under "Your appointment will be rescheduled to this date"
13. Click the yellow "Confirm Information" button at the bottom of the page (may need to scroll down) to make the new appointment
14. 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)
15. The yellow "Print Receipt" button will allow you to print this appointment information page
16. 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. An appointment isn't revised until the yellow "Confirm Information" button is clicked.