

What is the Riverstar Appointment Scheduling System?

RiverStar is a customized appointment scheduling system that enhances the customer service experience for VITA clients by increasing access and reducing wait times (as opposed to walk-ins).

RiverStar has a self-service and site admin feature.

Clients are able to book appointments online or by phone (refer to user guide for more information)

What can I do as a site administrator?

- A site administrator is usually a site coordinator at a free tax prep site. Using log-in credentials, they can:
 - View appointments made for a particular day
 - Update scheduled appointment
 - Run reports for VITA appointments made for your site.
- You can also contact United Ways of California to:
 - Update text or e-mail campaigns or messages

Frequently Asked Questions

Do I get notified when a client makes an appointment?

There is no individual notification for each appointment that gets made or cancel. Rather, a report of appointments made is available in real time through site admin access. This includes client's name and contact info. Site administrators can download reports in pdf or csv format on the "Reports" section (left hand side bar). Site admins should print or save this report for their records.

How do I update my site information (days, hours, etc.) that are showing on myfreetaxes.org?

You can do that by accessing the "Update Slots" feature on the site admin side. Upon opting-in, we will e-mail you a template to upload your site's schedule and we will upload that to the system within 1-2 business days. From there, you can update these slots individually. Refer to user guide for step-by-step on updating slots

How do I update the appointments available for my site?

To update slots of appointments available for your site, click on "Scheduler Admin" on left hand bar. From the data dropdown, select a date, or click the add date button to add a new date. You can either update the number of slots for a specific time or add a new start time by clicking the appropriate button. If you click add new time, follow prompt to enter new time. If you update your slots, it will also be updated in the client and agent facing system

RiverStar Quick Reference Guide for Site Administrators

What do I do if I also accept walk-ins?

Only include the appointment slot times for the times where you will take appointments. Said that, we encourage sites to provide plenty of appointment times so that the system can provide options to clients trying to self-schedule.

Who should I contact if I have a question about using RiverStar?

Please direct questions to Nalleli Sandoval via e-mail at nsandoval@unitedwaysca.org

Agency: _____

Username: _____

Password: _____

My Site URL: _____
