

Tax Return Drop-off/Pick-up Procedure

Mesa United Way VITA Program

Mesa United Way will be providing tax services at the Mesa United Way (MUW) office, 137 E University Drive, Mesa AZ 85201. Please note the following procedures and restrictions.

Appointments Required for ALL services – Call 480-834-2113 for an appointment. Please leave a message and your call will be returned within 48 hours (generally 24 hours). Please leave **only one message**. **Please arrive on time** for your scheduled appointments. We can only have a limited number of people in the office at one time.

Office Rules - based on concerns regarding the spread of the coronavirus (COVIT-19).

1. **Face masks** (covering mouth and nose) must be worn in the office at all times. All clients are expected to provide their own masks.
2. **Social distancing** (6 ft. apart) must be maintained at all times.
3. **Maximum of 2 people** – please do not bring children to the tax appointment.
4. **Anyone experiencing any signs or symptoms of any illness must stay home.**
5. The bathrooms at MUW are **reserved only for MUW staff**.

Tax Return Drop-off – During your first visit you will fill out several forms and sign a document confirming that you are leaving your tax information for preparation. You must have all of your tax information available including (but not limited to) W2s, 1099's, 1098's, detailed expenses (for self employment) etc. We can provide a more detailed list upon request.

You will meet with an experienced tax preparer who will go over all of your information with you and answer any questions you may have. You will leave all of your tax documents with MUW. This meeting should take approximately 30 minutes. Additional time may be required if you have a complicated return or have more than one year to prepare. We will schedule your pickup time and date before you leave our facility.

Tax Preparation – MUW volunteers will prepare your tax return(s). Generally within one week. You may be called if there are any questions that come up... so please answer our telephone calls. We may also need to call you to change your pick-up date and time.

Tax Return Pick-up – You will return on your scheduled date and time to pick-up your completed return. At that time we will review your finished returns with you and answer any questions you may have. After you have signed your return(s) you will receive a copy for your files. All original documents will be returned to you at that time.

Tax Return Filing - We will e-file your returns with your approval or you will mail in your returns (if over three years old). We will contact you only if your return is rejected by the IRS or state when we submit them. Otherwise you are finished!

