

# **During tax season, like the last several years, we offer 2 options for dropping off your return:**

**\*\*Whichever option is easier for you, please include a copy of your (& spouse, if joint) drivers license.**

For fraud/identity protection, the state of Indiana (like most states) requires us to enter your drivers license information to file your return.

**Option 1) Mail/Drop slot** – You can mail to us or drop off your tax documents in our 10 x 1 inch drop slot located on the concrete area to the right of the front door (please don't use the slot directly in the door.) All paperwork must be dropped off by April 1<sup>st</sup> to allow time for us to complete your return & mail to you for signatures.

- Please open your mail first so you can verify the sender (employer, mortgage company, etc) has your information correct (name, SSN, income, etc).
- Put all your tax documents into a disposable envelope (or something to keep it all together that you don't mind if we dispose of) & slide it through our 10 x 1 inch drop slot. Please be sure to include your phone number.
- Once we receive it, we will prepare your return & call you if we have any questions.
- When your return is complete, you will be able to pay our bill by credit card over the phone.
- Once our bill is paid, we will mail to you your packet. Included in the packet will be your original documents you gave us, a complete copy of your return & the electronic filing forms that need to be signed by you, spouse, if joint, & any dependents that are filing their own return. Those signature pages must be returned to us.
- Once you return the signed electronic filing forms, by mailing them back or dropping them in our drop slot, we will file your return electronically. The rest of the packet is yours to keep!

**Option 2) Online Portal** – If you setup a personal portal through us, you will be able to “drop off” your tax documents (W2's, 1099's, mortgage statements, etc) from the comfort of your home! It's as easy as scanning the documents on a PC or taking a picture of each document on a smartphone & uploading to us in a standard noncompressed format such as pdf, jpeg/jpg, or png. Please ensure all documents are readable (not blurry, cut-off, etc).

- Once we receive them we will prepare your return as normal & contact you if we have any questions.
- We will also message you in the portal first if we have questions, so please be sure to check your portal regularly. You can also use this messenger feature to message us questions or information. During tax season, this is likely faster than leaving us a voice message.
- When your return is complete, you will be able to pay our bill electronically or by credit card over the phone.
- We will then send you an electronic copy of your return to review before signing electronically.
- Once we receive the signed forms back electronically, we will file your return electronically with IRS and any applicable states.

**If you used our portal last year**, you can simply log in to your account & begin uploading any time by visiting <https://MellonTaxService.securefilepro.com> or download the SecureFilePro by Drake Software app on Google Play or Apple App Store.

**If you are new to the portal, all we need to get you started is your email address.** You must be 18 to setup a portal. If you have dependents under age 18 who file a return, you can send their documents to us through your portal. Dependents 18 & over (regardless of if they are claimed by someone) should setup their own portal. To request a portal account, please email us at [MellonTaxService2021@gmail.com](mailto:MellonTaxService2021@gmail.com) from the email address you wish to use for your account (please only use this email to request portal access, do not attach any tax documents, you will upload those to your portal after you create your account.)

**\*\*in the email request, please include your full name (& spouse, if joint), address, phone number, email address, & last 4 digits ONLY of your social security number (for identity verification).** Be sure to only put the last 4 digits of your social, you should never include your entire social security number in an email. After we receive your email request, you will receive an email invite from us with a link to complete setting up your secure personal portal. Once setup is complete, you will be able to upload documents to us.

We have used the Mail/Drop slot process & portal the last few years with success and are happy to continue to offer the convenience to our clients. Whether you choose to drop off through our drop slot, mail, or use our online portal, you will receive the same friendly service we have provided for 90 years. We will, of course, be available by phone if you have any questions through the process. Like last tax season, all business will be handled by phone, online portal, & mail/drop slot during tax season. We will be available for phone calls during our normal tax season business hours: Monday - Friday 9-5 & Saturday 9-12. You can also leave us a message anytime & we will get back to you as soon as possible.

Thank you for your continued business, stay safe & healthy. Mellon Tax Service