

We have received a lot of positive feedback about how we have operated the last few years & the convenience it provides our clients. With that, during tax season this year, we will be operating the same we did the last few tax seasons with our building closed to the public & 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 drop slot located on the concrete area to the right of the front door (please don't use the slot directly in the door.)

- 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 an envelope (or whatever you have that you can keep it all together) & slide it through our drop slot. Please be sure to include your phone number.
- Once we receive it, we will prepare your return as normal & 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.
- We will then mail to you your packet (which you normally pick up in the building). 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).
- 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 as usual. (The rest of the packet is yours to keep!)

Option 2) Online Portal (for returning clients only) – Through our software company, we have setup a secure 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 scan the documents on a PC or take a picture of each document on a smartphone & upload to us.

- Once we receive them we will prepare your return as normal & contact you if we have any questions.
- There is a messenger feature in the portal where you can message us questions or information (during tax season, this is likely faster than leaving us a voice message.) We will also message you in the portal first if we have questions, so please be sure to check your portal regularly.
- 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 the required forms to be signed electronically & an electronic copy of your return.
- Once we receive the signed forms back electronically, we will file your return electronically as usual.

If you used our portal last year, you can simply log in to your account & begin uploading any time

If you are new to the portal, all we need to get you started is your email address. To request a portal account, please email us at 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 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. You will receive an email invite from us with a link to setup your secure personal portal.**

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