

# VITA Client Instructions

## Mesa United Way VITA Program

**Free tax return preparation services are being provided at multiple locations in the East Valley:** For more information <https://www.azuracares.org/vita>

Please note the following procedures and restrictions.

VITA Sites are either **Walk-in** or by **Appointment**. Please see the “**MUW VITA Site Map and Schedule**” or “**Find a VITA Site**” on <https://www.azuracares.org/vita-sites>

**Walk-in Sites** – Most sites are “First-come/First-served” for all clients (except that priority will be given to clients needing special accommodations whenever possible). Last intake will generally be 1 hour before closing. Each site has a different capacity for the number of clients that can be served during a session. You may be asked to come back on another day or to go to another site.

**Appointment Sites** - There are three ways to schedule an appointment.

1. Schedule one yourself at one of the **VITA sites on the MUW website** (preferred)
2. Email [vita@mesaunitedway.org](mailto:vita@mesaunitedway.org) for an appointment
3. Call **480-834-2122** - Please leave only one message.

Your call/email will be returned as soon as possible. It may be one or two days. Please **arrive on time** for your scheduled appointment. Only a limited number of people may be allowed in the site at one time.

### **Preparation for your visit**

1. **Picture IDs** (for taxpayer and spouse if married) are required.
2. **Social Security Cards** for all individuals on the tax return
3. **All tax documents/information** including (but not limited to) W2s, 1099's, 1098's, detailed expenses (for self-employment) etc. A more detailed list can be found on our website.
4. **Prior year's tax return** - Please bring it if possible (not required but may be helpful).
5. **Organize your documents** – remove them from their envelopes and open them up.

**Tax Return Drop-off** – During your visit you will fill out several forms and sign a “Virtual Consent Form” if you are leaving your tax information for preparation. Please see “**VITA Forms Descriptions**” for more information.

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 15 minutes. Additional time may be required for complicated returns or multiple years.

**Advanced Pickup of VITA Forms** – You can save time by filling out the required VITA client forms in advance of your Drop-off meeting. Download them at <https://www.azuracares.org/vita-docs> , pick up a packet from any site, or request by email to [vita@mesaunitedway.org](mailto:vita@mesaunitedway.org) .

**Tax Preparation** – MUW volunteers will prepare your tax return(s), often while you wait, or you may be asked to come back and pick them up on another day. Your pick-up time will be scheduled when you drop-off. You may be called if there are any questions that come up... so please answer your telephone.

**Tax Return Pick-up** – You will return on your scheduled date and time to pick-up your completed return. **You must return to the VITA site to sign your tax return. We will not e-file your tax return(s) until you sign them. We will not call you to remind you of your appointment. It is your responsibility to return to the tax site.** We will review your finished returns with you and answer any questions you may have. After you sign your return(s) you will receive a printed copy for your records. All original tax documents will be returned to you. Remember, if filing a joint return, both taxpayers must be present to sign their return(s).

**Tax Return Filing** - We will e-file your returns 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 after they are submitted.

