ALW Associates, Inc. COVID Procedures FAQs:

Will I be able to have an in-person meeting to get my tax return prepared while I wait?

As we continue to navigate these uncertain times together, the safety of our clients and staff are our top priority. Therefore, in person appointments are NOT available now. Please read all the FAQs for guidelines on the modified way we are operating so that we can meet the needs of our clients safely.

How do I submit my documents?

You can choose from the following methods:

1. **Drop off:** In order to help us maintain social distancing by limiting the number of people in the office, we prefer that you schedule a drop off time by calling the office and coordinating a time with the front desk attendant. Once you arrive for your scheduled appointment, please call the office number and we will meet you curb side or provide additional instructions. We also have a locked mailbox on the wall to the left of the entrance. You may drop off documents after hours or without scheduling an appointment by using this outside mailbox. If you choose this method, call the office, and let the attendant know you have left documents in the box. If you are able, we ask that you make copies of your documents prior to submitting them to us. If you are not able to do so, let the attendant know when you make the appointment, and he will be prepared to make copies for you while you wait.
2. **Portal Upload:** Let us know if you would like to submit your documents digitally, and we will set up your personal client portal and send you the instruction via email. You will be able to access this portal through our website after establishing your password then upload your scanned documents for preparation. We will be notified when you do and will send you an acknowledgement of receipt. We ask that, if possible, please submit the files in a PDF format. Using a scanner rather than a cell phone usually gets better results and allows for you to save the file as a multiple page PDF instead of having several individual files to upload. If a cell phone camera is your only option, please make sure each document is clear, legible, not cut off or skewed in any way.
3. **US Mail:** We advise that you make copies of your documents for your own record then mail us your original documents. We strongly recommend sending them by Certified Mail with a return receipt or any other method that allows you to track the package.

What happens after my documents are submitted?

Once we receive your documents, we will put your tax return in line to be worked on. One of our staff preparers will input your data and will contact you either by telephone or email with questions or request possible missing information. We will work on returns in the order they are received. Once all the information is compiled and all questions are resolved, Mel will do a final review. He will then communicate with you via teleconference, email, or video conference to go over the results and steps needed to finalize.

How do I get a copy of my finalized tax return package?

In the same manner as you submitted documents, we can use the US Mail, upload to your client portal, or schedule a curb side pickup. Please let us know which method you prefer.

Will I be required to wear a mask?

Yes, if you choose any method that requires face to face contact with a staff member, even if brief, you will need have a face mask on. The staff associate that greets you will also have a mask on.

What if I or someone I have been in contact with has COVID or is experiencing cold or flu symptoms?
Please do not come to our office until you have followed the CDC quarantine guidelines and you are free of symptoms. You may utilize any options outlines above that do not require contact, such as the client portal and video and teleconferences.

What if I have another matter unrelated to income tax preparation?

If you need help with another matter, please contact the front desk attendant to arrange a teleconference or video conference. If there are documents that relate to the issue, we will need them submitted at least two days prior to your appointment. Follow the guidelines outlined in the question above “How do I submit my documents?” During our busy tax season, we will determine the urgency of the matter. If it is determined that it does not require immediate attention, we may adjust your appointment to a later date, after our busy time, so we may give it the attention it needs.