



## Timeline for Return Preparation by Type: 2022 Tax Season

### **NORTH & SOUTH PROSPER CENTERS: From site opening date through Tuesday, February 15**

We will prepare these returns on-site with no restrictions:

- Basic
- Advanced (such as those with income from self-employment or contract work, those who contributed to or took a distribution from an HSA, and those with Form 1095-A reflecting health insurance coverage through the Marketplace).
- 2021 tax returns as well as prior year tax returns for 2019-2020

We will not prepare these returns on-site:

- Amendments

### **ALL OTHER SITES: From site opening date through Tuesday, February 15**

We will prepare only these returns on-site:

- Basic returns for 2021

We will not prepare these returns on-site:

- Amendments
- Tax years prior to 2021
- Advanced returns (such as those with income from self-employment or contract work, those who contributed to or took a distribution from an HSA, and those with Form 1095-A reflecting health insurance coverage through the Marketplace).

**Exception:** Based on site capacity, Site Managers may allow prior year returns (from tax years 2018 to 2020), and/or Advanced returns to be prepared on-site, if factors such as volume of client traffic, availability of volunteers, and certification level of volunteers allow.

**Note:** Taxpayers with return types that are not being prepared on-site may elect to have their return(s) prepared through the **Drop-Off Program**. From the site opening date onward, the Drop Off Program will accept all tax years and all types of in-scope returns, including state returns.

## **ALL SITES: From Wednesday, February 16 through Monday, April 18**

We will prepare these returns on-site:

- Basic
- Advanced (e.g. returns with a Schedule C, HSA account activity, 1095-A)
- 2021 and prior years 2019-2020
- Amendments

These returns will be sent to the Drop-Off Program:

- 2018 and prior
- State Returns (including state withholding on **Forms 1099-G** or **1099-R**)
- Returns with International Income
- Returns with Rental Income (including AirBnB income) unless prepared by STS in a prior year
- Returns requiring Military Certification
  - Returns with National Guard drill mileage
  - Returns with Combat Pay (designated as Code Q in Box 12 of **Form W-2** issued by the Defense Finance and Accounting Service (DFAS))
  - Returns with an expense claimed for Uniforms (military)

## **END OF SEASON PRIORITIZATION**

In the final week of the tax season, Site Managers may prioritize returns for these tax years:

- 2018 – because this tax year must be filed by April 18, 2022 in order for the taxpayer to still receive any refund due
- 2021 – because these returns are due April 18, 2022

Taxpayers unable to file tax returns for any tax year before the end of the regular filing season have the option to return during the June – October Tax Help Program (“Year Round”) to complete the return(s).

## **MESSAGING TO CLIENTS**

*From the beginning of the tax season through February 15, we will prepare only Basic 2021 tax returns in person, except at our South and North Prosper Centers which will accept other return types. Our Drop Off program will also accept all return types and tax years. Beginning February 16, we will prepare onsite both Basic and Advanced returns, amended returns, and returns for tax years 2019 through 2021.*