



## Timeline for Return Preparation by Type: 2023 Tax Season

### **ALL TAX PROGRAM SITES: From site opening date through Tuesday, February 21**

We will prepare these 2022 tax 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).

We will **not** prepare these returns on-site **until February 22** (send these tax returns to Drop Off):

- Amendments
- Tax returns for prior tax years 2019 to 2021  
**Exception:** Based on site capacity, Site Managers may allow tax years 2019 to 2021 to be prepared on-site, if factors such as volume of client traffic, availability of volunteers, and certification level of volunteers allow.

**Note:** From the site opening date onward, the **Drop Off Program** will accept all tax years and all types of in-scope returns, including all state returns.

### **ALL TAX PROGRAM SITES: From Wednesday, February 22 through Tuesday, April 18, 2023**

We will prepare these returns on-site:

- Basic
- Advanced (e.g. returns with a Schedule C, HSA account activity, Form 1095-A)
- 2019 through 2022 tax years
- Amendments - Amendments should be sent to Drop-Off if they require expertise, experience or time that is not available at the tax site

These returns must be sent to the **Drop-Off Program**:

- All 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:

- 2019 – because this tax year must be filed by July 15, 2023 in order for the taxpayer to still receive any refund due
- 2022 – because these returns are due April 18, 2023

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 21, we will prepare only Basic and Advanced 2019-2022 tax returns in person. We will prioritize 2022 returns during this time. Our Drop Off Program will accept all return types and all tax years immediately. Beginning February 22, we will prepare onsite both Basic and Advanced returns, amended returns, and returns for tax years 2019 through 2022.*