

FACT SHEET FOR SPEC PARTNERS

IRS January 30 Open Season



Key Messages

- **IRS will begin processing tax returns January 30**
- **April 15, tax filing deadline, has not changed**
- **TaxWise is scheduled to enable e-file capabilities on January 22**
- **FSA returns will not be submitted to IRS until January 30**
- **Taxpayers can check the status of their refund after Jan 30 on irs.gov, “Where’s my Refund?”**

Following the January tax law changes made by Congress under the American Taxpayer Relief Act (ATRA), IRS issued [News Release, IR-2013-2](#), on January 8, 2013 to announce its plans to open the 2013 filing season and begin processing individual income tax returns on January 30, 2013. This is a change from the originally announced date of January 22, 2013. The April 15, tax filing deadline, has not changed.

What does this mean for Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) sites?

We realize many of you have plans to open prior to January 30, but we are asking you to consider delaying your opening until January 30, to provide a better taxpayer experience and reduce the possibility of multiple contacts with the site and potential for inaccurate returns. The majority of returns prepared through the VITA and TCE programs can be filed January 30. We are updating some of the 2012 tax forms, instructions and publications. Those needed for returns that can be filed starting January 30 will be available by January 22. The IRS will not process paper or electronic returns before January 30.

If you are unable to delay your plans to open the site, then we encourage you to consider the following:

- CCH Small Firm Services, the developer of the TaxWise software used at majority of the VITA/TCE sites, has released the US 1040 Modules 1 and 2 for its desktop and online products.
- These updates will allow preparers to create and print returns, but will not allow them to create an e-file.
- The e-file feature in TaxWise is scheduled to be enabled on January 22. However, returns cannot be e-filed with IRS until January 30.
- Volunteers can prepare and hold returns until the IRS e-file start date of January 30. The IRS does not consider returns held prior to January 30 as stockpiled.
- Taxpayers **must** be notified that their tax return will not be transmitted to IRS prior to January 30.
- The IRS will not accept federal or state returns prior to January 30.
- The IRS has been working with the Federal Tax Administration (FTA) which indicates states will be ready for the startup of e-file on January 30.

What’s the impact to Facilitated Self-Assistance (FSA) sites?

The FSA sites will largely work under the same timeframes as traditional VITA and TCE sites. Completed returns will not be submitted to the IRS until e-file opens on January 30. While some FSA vendors are allowing taxpayers to begin completing their returns, this is not the case for all companies. Partners can check their FSA URL to see if their vendor(s) are currently open for taxpayers to begin completing returns.

The FSA vendors are required to advise taxpayers about delays in processing returns submitted prior to January 30. However, partners

January 18, 2013

Fact Sheet for SPEC Partners
IRS January 30 Open Season

should reinforce this message and encourage taxpayers to check the vendor site, their email and IRS.gov once e-file officially opens.

When can taxpayers expect their refunds?

Once the IRS begins processing returns starting January 30, we expect refunds to be issued within normal timeframes. The IRS issued most refunds in **less than** 21 days last year and expects to do the same in 2013. Encourage taxpayers to check the status of their refund on irs.gov, *Where's my Refund?* **starting** January 30, 2013. More information is available at <http://www.irs.gov/Refunds/What-to-Expect-for-Refunds-in-2013>

Who should we contact for assistance regarding acknowledgements, etc?

Due to the potentially large volume of returns being transmitted on January 30, CCH SFS (TaxWise) does not want users to contact their customer support with inquiries about acknowledgments until February 1. This will allow both IRS and CCH SFS time to process and deliver acknowledgements for returns transmitted on that date. Tax preparers can check a return status on the TaxWise Solution Center (<https://support.taxwise.com>).

Questions regarding this or other communications should be directed to your local SPEC Relationship Manager.