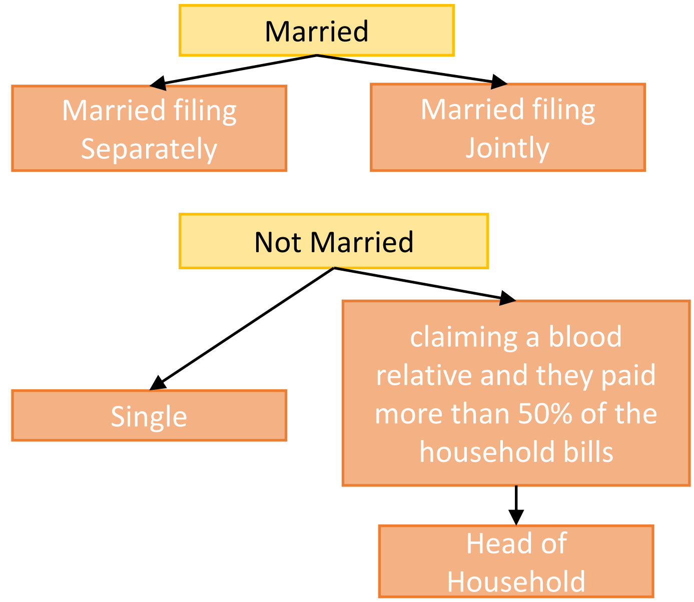
ATS TAX
REFERENCE GUIDE

2022 Standard Deductions

Filing Status	Base Amount
Single	$12,950
Married Filing Joint	$25,900
Married Filing Separate	$12,950
Head of Household	$19,400
Qualifying Widower	$25,900

Filing Status (Two Options)



Who can be claimed as a dependent?

ANYONE that lived with the taxpayer and was supported over 50% by the taxpayer can be claimed as a dependent.

- Age does NOT matter
- Relationship does NOT matter

Earned Income Tax Credit & Child Tax Credit

Eligible Dependent relationships

Son Daughter Grandchild Brother Sister Niece Nephew

To qualify for Earned Income Tax Credit (EIC/EITC)

- Live in the US
- Dependent must be 18 or under on 12/31/2022
- OR 19-23 and a full time student

Number of Dependents	Max EIC	Max AGI (Single/ HOH)	Max AGI (MFJ)
None	$560	$16,480	$22,610
One	$3,733	$43,492	$49,622
Two	$6,164	$49,399	$55,529
Three	$6,935	$53,057	$59187

To qualify for Child Tax Credit (CTC)

- Dependent must be 16 or under on 12/31/2022
- Maximum of $2000 per dependent
- Taxpayer must have $2500 of earned income

Contact Live Chat for any and all questions.

ATS SOFTWARE GUIDE

Refund Options & Bank Products

"EPS Advance"
They would like to apply for an advance to get a portion of their refund before the IRS releases it. Their fees will be taken out of their refund.

"EPS"
They do NOT want an advance. They will wait for the IRS to release their refund and want their fees taken out of the refund.

"**Efile**" or "Paper File"
They want to pay their prep fees upfront/today.

What is the Advance?
There are 2 advance products:

- Up to $1000 with no interest
- Up to $6000 with 36% interest

Important Info:

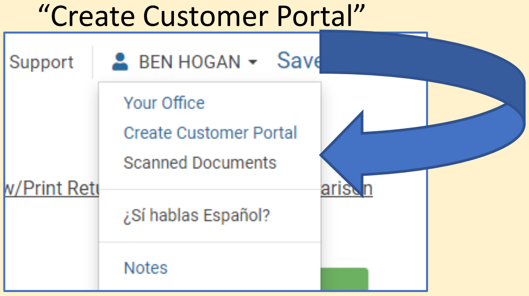
- No credit check
- Must have W2
- Interest capped at 60 days
- Only charged for what they are approved for (Applying is free)

Interest on Advance

Outstanding Loan Time Period	Cost Per $1,000 Borrowed
Refund is deposited in 14 days refund is	$13.81
Deposited in 21 days refund is	$20.71
Deposited in 28 days refund is	$27.62
Maximum charge (60 days)	$59.18

Send the portal link to customer for signatures or to collect or send documents

1. Enter the return you want to create the portal for.
2. In the top right corner under the name click "Create Customer Portal"



3. Enter the taxpayer's email or cell phone number to send them their link.

Client Status Key

- Advance Paid - Amount of Advance the taxpayer was approved for
- Bank Product Type/Description - What product the taxpayer applied for
- IRS Code – Status with IRS
- Advance Status Key:
  - A – Approved
  - D – Declined
  - N/A – Pending

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