

# Tax Time Thursday with Code for America

## *Outreach Reference Guide*

*Presented by the Center on Budget and Policy Priorities' Get It Back Campaign*

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### **Presenter Contact Information**

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### **Simplified filing with Code for America**

- **Our mission:**
  - We are people centered problem solvers showing that with the mindful use of technology, Government can work well for everyone
  - Focused on closing the tax benefits participation gap
- **Why we built GetYourRefund.org**
  - 10.5 billion EITC left on the table every year, by people who don't file taxes
  - We learned: Filing taxes is a major barrier
    - Trustworthy, affordable help is hard to find
    - Non-filers struggle to understand the ambiguous consequences of filing
    - Non-filers may not understand that filing gets them access to IRS benefits
  - Outreach alone is not enough to overcome these challenges. So, we launched GetYourRefund.org in 2020
    - GetYourRefund.org helps low-income people file full returns through VITA (Volunteer Income Tax Assistance) sites
- **2021 GetCTC.org key takeaways**
  - CfA built GetCTC.org, a simplified filing process in 2021
  - Simplified filing was a success
    - Over 115,000 accepted returns
    - 78% found the tool "easy" or "extremely easy" - including first time filers
    - Typical experience: finish the tool in 10 minutes on mobile phone
    - Over 95% did not request assistance
  - GetCTC.org was a simple tool embedded in a complicated system
  - This changes the calculus of tax benefits outreach. For many, outreach alone may be enough if simplified filing is available.
- **It isn't too late to help families file!**

- April 18
  - Official deadline
- October/November
  - Most filers with low incomes can still file without penalty

	<b>GetYourRefund</b> <i>Full Service, Virtual VITA</i> File for multiple years with assistance.	<b>File Myself</b> <i>Facilitated Self Assistance/DIY</i> File quickly online on your own for 2021	<b>GetCTC</b> <i>Simplified Filing</i> File quickly on your own to collect your stimulus payments and Child Tax Credit.	<b>VITA Site Location Finder</b> <i>In-person VITA</i> Find a site near you for in-person help
<b>Timeline and capacity</b>	<ul style="list-style-type: none"> <li>• 1/31/22 - 10/1/22</li> <li>• Limited capacity</li> </ul>	<ul style="list-style-type: none"> <li>• 1/31/22- 10/15/22</li> <li>• Unlimited capacity</li> </ul>	<ul style="list-style-type: none"> <li>• 5/2022 - at mid-November</li> <li>• Unlimited capacity</li> </ul>	<ul style="list-style-type: none"> <li>• Open dates vary</li> <li>• Capacity varies</li> </ul>
<b>Household income limit</b>	under \$66,000	Under \$73,000	Under \$25,000 (\$12,500 if filing individually)	Typically under \$58,000
<b>Filing years</b>	2021-2018	2021	2021	2021-2018
<b>Credits and payments</b>	CTC, Stimulus, EITC, State Credits	CTC, Stimulus 3, EITC, State Credits	CTC, Stimulus 3	CTC, Stimulus, EITC, State Credits
<b>Required information</b>	Photos of IDs (Social Security and ITIN paperwork)  Photos of tax documents (w2s, 1099s, etc)	Social Security or ITIN numbers  Tax documents (w2s, 1099s, etc)	Social Security or ITIN numbers	Paper copies of IDs (social security and ITIN paperwork)  Tax documents (w2s, 1099s, etc)
<b>Length of time to file</b> <i>IRS payment processing times vary 3-6 weeks</i>	2-3 weeks (includes 2 phone calls with VITA volunteer)	45 minutes	15 minutes	Depends on location
<b>Other Considerations</b>	<ul style="list-style-type: none"> <li>• IRS-certified VITA tax team</li> <li>• ITIN application assistance</li> <li>• Accessing required documents can be a major barrier for clients</li> </ul>	<ul style="list-style-type: none"> <li>• IRS-certified chat support available</li> <li>• Software is formatted for smartphones but computers or tablets are highly recommended</li> </ul>	Waiting for simplified may not be a good option for households at risk of their dependent being claimed by someone else	<ul style="list-style-type: none"> <li>• IRS-certified VITA tax team</li> <li>• ITIN application assistance (sometimes)</li> </ul>

- **Relaunching GetCTC.org in mid-May**
  - Simplified filing to collect stimulus payments and Child Tax Credit
  - Tool currently is only helpful in claiming the Child Tax Credit and third stimulus payment
- **Who can and should use GetCTC.org**
  - Eligibility requirements
    - Valid Social Security Number (SSN) or Individual Taxpayer Identification Number (ITIN)
    - Has not filed a 2021 tax return
    - Made less than 12,550 (single) or 25,100 (married filing jointly)
    - Earned less than \$400 in self-employment income
    - Lived in any of the 50 states or DC or in a US military facility
    - Did not have advance premium tax credits
  - You should use this tool to claim the Child Tax Credit and the 3<sup>rd</sup> stimulus payment
- **Outreach to new or intermittent filers (aka non-filers)**
  - Filing a full tax return is the hope
    - Full-service filing: outreach alone is not enough, most need support
    - Express filing: Outreach may be enough
- **CFA's recommended option in the offseason: GetCTC.org**
  - Launches in mid-May
  - Most clients complete the process without help in 10-15 minutes

- If the clients are not eligible, or would benefit from full filing, we refer them to GetYourRefund.org
- Chat support available
- **Connecting clients to GetCTC.org**
  - Outreach and assistance options
    - Building awareness
    - Access to online tools
    - Assisting clients in understanding their next steps
    - Interpretation services
  - Request Unique URL and Sign up for updates here or at GetCTC.org/navigators
    - You can request a unique URL to track referrals ([sign up here](#))
    - VITA programs can report these numbers
  - Know what you can and can't do
    - Can: provide access to online tools and build trust/reassurance in process
    - Cannot: Provide tax advice (without additional training and certification)
  - Familiarize yourself with available resources
    - GYR Navigator resources/modules ([find resources here](#))
    - GetYourRefund.org chat support
    - Local VITA programs, Low Income Taxpayer Clinics (LITCs), existing outreach programs
  - Dive in!!
- **2022 Navigator Resources at GetCTC.org/navigators**
  - Chat assistance available to users and navigators
  - Current navigator materials
    - Service options
    - Setting up file myself stations
    - Full-service navigator guide
    - Outreach toolkits
    - Reports
  - Coming soon
    - May 19 getCTC navigator training ([register here](#))
    - GetCTC demo recordings
    - GetCTC guide
    - Common rejects and how to assist
    - Post filing Assistance
    - GetCTC outreach partnership guide

## Q&A

- **I have a client who wants to claim the Child Tax Credit but they are undocumented. If they don't have an ITIN, can they use GetCTC.org?**

- To use GetCTC.org, they must already have an ITIN. They can use GetYourRefund.org to submit a full tax return and ITIN application, however, they are too late to receive the expanded Child Tax Credit for Tax Year 2021.
- **Does the ITIN number need to be active to claim the Child Tax Credit?**
  - If they need to renew their ITIN, they need to file a full tax return. If they used it in the past few years, they should be fine. It depends on when that person applied for the ITIN. <https://www.taxoutreach.org/tax-filing/itin/itin-renewals/>
- **Can you walk us through the referral dashboard?**
  - We are pushing out a new dashboard soon for GetCTC.org!
  - Anyone who signed up for GetCTC.org updates will be emailed when the tool goes live.
- **Can you explain more on the outreach tools that you are providing us?**
  - We will have a partnership guide, but we rely on our partners for actual outreach materials.
  - Use the Get It Back campaign's [Child Tax Credit outreach toolkit](#), which will be updated to direct clients to GetCTC.org.
- **Can you use your GetCTC.org referral link on public-facing websites?**
  - Yes! You can have it on a public facing website. We are eager for people to show it everywhere they can!
- **Any tips for organizations interested in adopting and adapting the outreach + simplified process for their local community?**
  - The messaging for traditional filers is going to be different for non-filers. There is a modification that needs to be made to the demographic we are talking to. Many people do not know that tax filing continues after the deadline. Reach out to organizations and let them know that people can still file right now.
- **With chat support, I've noticed that the staff can only help with certain kinds of questions. What can we do if the support we need is out of scope?**
  - Unfortunately with chat support, because we are working with the IRS and VITA, we can only answer questions within the scope of VITA regulations. There are some organizations that can help in these situations, but they are limited.
    - In instances where things are out of scope for us, we refer to CPA assistance where they do offer pro bono work. So, I encourage people to reach out to state CPA associations.
- **Regarding unclaimed first and second stimulus checks, is CFA going to expand GetCTC.org to claim past years' credits or is it restricted to the current tax years**
  - GetCTC.org is restricted to Tax Year 2021, however, GetYourRefund.org can help you file a full tax return for past tax years.
- **Can you do complicated state-level returns through GetYourRefund.org?**
  - It depends on the scope of the specific returns. It will take longer for that person to have a completed tax return.
- **In what cases should undocumented immigrants use GetYourRefund.org vs GetCTC.org?**
  - If they do not have an ITIN use GetYourRefund.org. If they do have an ITIN, it will depend on the person's case, but they aren't disqualified for having an ITIN.