

Stimulus Payments Outreach

6.23.20

Center on Budget and Policy Priorities

Center on Budget and Policy Priorities

Nonpartisan research and policy institute

We pursue federal and state policies designed both to reduce poverty and inequality in equitable and effective ways.

www.cbpp.org

Get It Back Campaign

National effort to connect eligible workers to tax benefits

Promote the Earned Income Tax Credit, the Child Tax Credit, free tax preparation, and other tax benefits

Work with a network of diverse partners

www.eitcoutreach.org

Today

The Data on Non-filers

Outreach Resources for Organizations & State Agencies

211 EIP Hotline

[GetYourRefund.org](https://www.getyourrefund.org)

Local outreach – Boston Tax Help Coalition & Angel Resource Connection

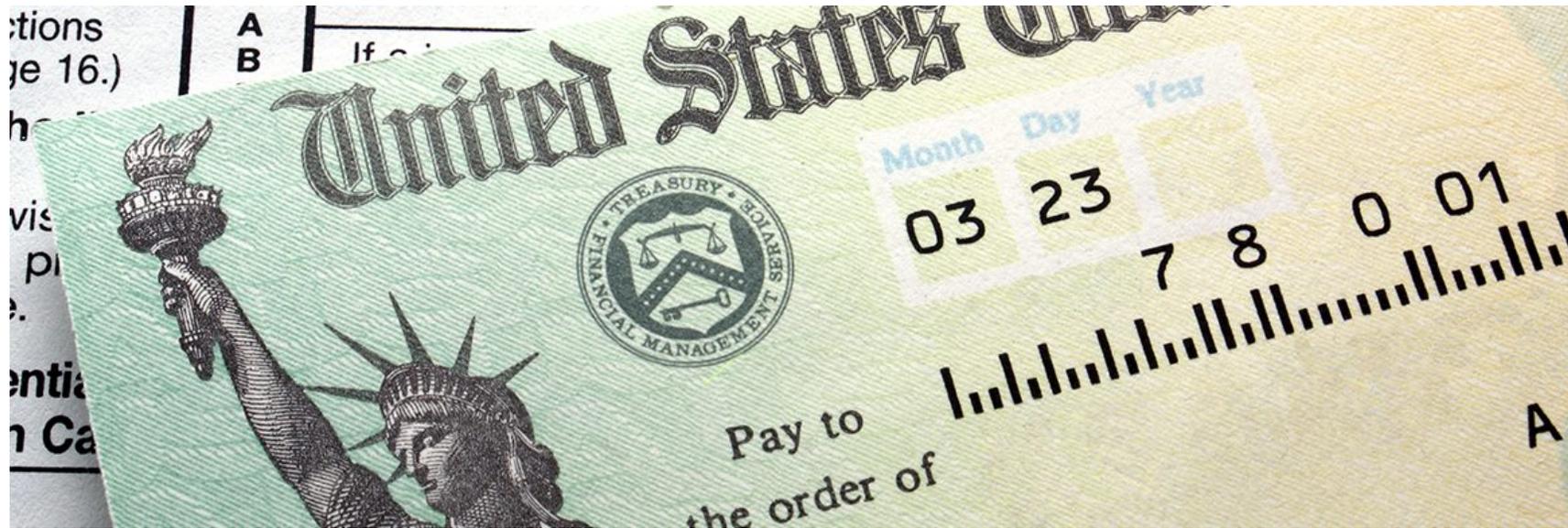
Check-in Question

Go to the chat box and select “all panelists and participants” to answer the following questions:

- 1) Where are you joining from?
- 2) What’s one thing you’re doing (or going to do) for EIP outreach?

Why Are Economic Impact Payments (“Stimulus Checks”) Important?

- \$1,200 temporary tax credit
- Non-taxable money
- No minimum income needed to get the payment



Why is Economic Impact Payments Outreach Needed?

Through SNAP and Medicaid, States Can Reach Many Not Receiving Automatic Stimulus Payments

✓ Receiving automatic payments

- Tax filers in 2018 or 2019
- Social Security recipients
- Supplemental Security Income recipients
- Veterans Affairs pension or disability recipients
- Railroad Retirement recipients

⊘ Not receiving automatic payments

About 12 million people

- **9 million** didn't file tax returns for 2018 or 2019 or receive any benefits listed above, but do receive SNAP and/or Medicaid
- **3 million** didn't file tax returns for 2018 or 2019 or receive any benefits listed above, and don't receive SNAP or Medicaid

Source: CBPP analysis of the U.S. Census Bureau's Current Population Survey for 2015-2017, with corrections for underreported SNAP and SSI from the Department of Health and Human Services/Urban Institute Transfer Income Model (TRIM)

- Automatic payment delivery misses some people
- Answer questions that may prevent eligible people from signing up
- People need help completing the online form

Who are Economic Impact Payment Non-Filers?

- Very low-incomes
- Non-elderly
- People of color
- Adults not raising children in the home
- Lack secure housing

Getting Started

- 1. Connect to partners and help in your area.** People will need support with filing taxes, completing the non-filer online form, and troubleshooting in tricky situations.
- 2. Direct people to other resources.** You don't need to be an expert on the EIP to do outreach. There are materials and templates you can use.
- 3. Figure out your role and what you can offer.** Do you and your organization have capacity to assist, refer, or notify?

<https://www.eitcoutreach.org/tax-filing/coronavirus/getting-started-with-economic-impact-payments-outreach-3-questions-to-answer/>

Outreach Materials Hub

REPORT: [Aggressive State Outreach Can Help Reach the 12 Million Non-Filers Eligible for Stimulus Payments](#)

MATERIALS: [Stimulus Payments Outreach Resources](#)

GETTING STARTED: [Getting Started with Economic Impact Payments Outreach](#)

CUSTOMIZABLE FLYER (translations added soon): [8.5 x 11 Stimulus Payments Informational Flyer](#)

SEND PEOPLE HERE: [Get Your Stimulus Check from the IRS](#)

FAQs: [What to know about the Economic Impact Payments \(Stimulus Checks\)](#)

Sample social media graphics and posts, press release, blog template, and talking points and more available on the website.

Home > Tax Filing Resources > Stimulus Payments...

Stimulus Payments Outreach Resources

Did you know that millions of eligible people could miss out on their Economic Impact Payments (EIP) – commonly called “stimulus checks” – because they have to file an online form with the IRS to get it? While most people get their payments automatically after filing a tax return (or based on participation in certain federally administered programs), this group of “non-filers” must take action to get their money (worth \$1,200 for adults and \$500 for qualifying children).

Eligible individuals have until **October 15th** to file for their EIP this year, so there's a lot of work to do to get the word out.

Will you join efforts to help leverage the estimated \$12 billion EIPs available for 12 million eligible people?

The resources: This EIP resource center provides advocates, community organizations, and partners vital information to share what people need to know and where people can find help to get their payments. On this page, you will find guides to getting started, ready-to-use materials to share, and resources to help you learn more.

Start Here: [Getting Started with EIP Outreach](#)

Direct People Here: eitcoutreach.org/stimulus

Research

- [Aggressive State Outreach Can Help Reach the 12 Million Non-Filers Eligible for Stimulus Payments](#)
- [State TANF Agencies Can Help Connect TANF Households With Federal Economic Impact Payments](#)
- [State SNAP Agencies Can Help Connect SNAP Households With Federal Economic Impact Payments](#)

Guides

- [Getting Started with EIP Outreach](#)
- [A Guide to Stimulus Payments](#)

Materials

- [8.5 x 11 Informational Flyer](#)
- [Social Media \(graphics and posts\)](#)
- [Press Release Template](#)
- [Blog Template](#)
- [Sample Website Text](#)
- [Talking Points](#)
- [Email Templates](#)

Get Your Stimulus Check from the IRS

Economic Impact Payments, or "Stimulus Checks" help reduce the financial burden of COVID-19

eitcoutreach.org/stimulus

Am I eligible?

You are eligible if:

- 1 Your income is under \$75,000 (single or married filing separately) or \$150,000 (married filing jointly). You also qualify if you have no income.
- 2 You and your spouse, if filing jointly, each have a valid Social Security number (one if military).
- 3 Someone else cannot claim you as a dependent on their tax return.

How do I get the payment?

You can check on the status of your payment on IRS.gov/GetMyPayment.

Do nothing if you:

- Already filed taxes for 2018 or 2019; OR
- Receive Social Security, Social Security Disability Insurance (SSDI), or Supplemental Security Insurance (SSI); OR
- Are a railroad retiree or Veterans Affairs (VA) beneficiary.

The IRS will send your payment by direct deposit or mail. You will get a letter from the IRS stating when the payment was made and how.

Complete an Online Form if you:

- Earned less than \$12,200 (\$24,400 if married) in 2019*; AND
- Are not required to file a tax return; AND
- Don't plan on filing.

Go to www.irs.gov/eip and click the button for non-filers

Complete the form by **October 15** so the IRS knows where to send your payment.

File your taxes now if you:

- Earned more than \$12,200 (\$24,400 if married) in 2019.

How to file for free by October 15:

Virtual Tax Prep

If you have access to a mobile phone or a computer connected to the internet, you can get help to file your federal and state taxes. Go to GetYourRefund.org.

Do-It-Yourself Taxes

File your own taxes at MyFreeTaxes.com or IRS.gov/FreeFile.

Volunteer Income Tax Assistance (VITA)

While many sites are closed, some offer drop-off or virtual help. Find your local VITA site to call: irs.treasury.gov/freetaxprep/.

*If you had any earnings in 2019, you may qualify for other refunds. File your 2019 taxes to apply for the stimulus payment and claim any additional qualifying credits.

Beware of scams

The IRS will NOT contact you by phone, email, text message, or social media to request personal information – especially banking details – or ask you to provide a "processing" fee. The IRS will send written correspondence.

The IRS refers to this money as an "Economic Impact Payment." Communications that use phrases like "stimulus check" or "recovery rebate" probably aren't from the IRS.

THE DETAILS

▶ Direct Deposit

If you don't have a bank account, the IRS will mail you a paper check, but it will take much longer. If you don't have a bank account, you can still get direct deposit by entering an account and routing number. You can find these numbers with:

- **Prepaid debit card** - Once you get a card, you may need to contact the company directly to find the account and routing numbers needed for direct deposit.
- **Payment apps** - CashApp, Venmo, and PayPal now offer account and routing numbers you can use for direct deposit.

▶ Address Changes

If you have moved since filing a 2019 tax return, update your address at your local post office or moversguide.usps.com.

If you don't have a permanent mailing address, you can ask to use the address of a family member, friend, or a place you go to for services (such as like a health care clinic, drop-in day center, shelter, community action agency, or church).

▶ Self Employment/ Gig Work

If you made over \$400 in self-employment income in 2019, you must file a tax return. Your stimulus payment will not be reduced if you haven't paid self-employment taxes. You may be charged late fees by the IRS if you don't pay taxes by July 15.

▶ Immigrants

If you're married and filing jointly with your spouse, both spouses must have a Social Security Number (not an ITIN) to receive the payment. If your children do not have a Social Security Number (SSN), it does not affect your \$2,400 payment, but you will not receive a \$500 payment for them.

If you're married and filing separately from your spouse and one of you has an SSN and one of you has an ITIN, the spouse with an ITIN is not eligible and the spouse with an SSN is eligible for \$1,200.

If neither you nor your spouse has an SSN, you cannot get a \$500 payment for your children even if they have SSNs.

QUICK TIPS

KIDS

You'll get \$500 for every dependent child under 17 who has an SSN or Adoption Taxpayer Identification Number (ATIN).

PAPER RETURNS

The IRS is not currently processing paper returns. If you don't have internet access, get help to file electronically.

CHILD SUPPORT

If you are overdue on child support, your Economic Impact Payment could be reduced or eliminated.

BACK TAXES & STUDENT LOAN DEBT

Your payment will not be interrupted and you will receive the full amount.

BENEFITS

Your payment won't reduce the benefits you receive from SNAP, TANF, Medicaid, federal rental assistance, or another program. It will not affect unemployment payments.

For help with health coverage go to healthcare.gov.

TAXES

Payments are not taxed.

eitcoutreach.org/stimulus

8.5 x 11 Stimulus Payments Informational Flyer



Get Your Stimulus Check from the IRS

Economic Impact Payments, or "Stimulus Checks" help reduce the financial burden of COVID-19



You are eligible for the \$1,200 payment if:

1. Your income is under \$75,000 (single, or married filing separately) or \$150,000 (married filing jointly). You also qualify if you have no income.
2. You and your spouse, if filing jointly, each have a valid Social Security number (one if military).
3. Someone else cannot claim you as a dependent on their tax return.

[Stimulus Check Eligibility](#)

www.eitcoutreach.org/stimulus

Contact Info

Get It Back Campaign

Center on Budget and Policy Priorities

eitcoutreach@cbpp.org

(202) 408-1080

www.eitcoutreach.org

Reaching Non-Fileers

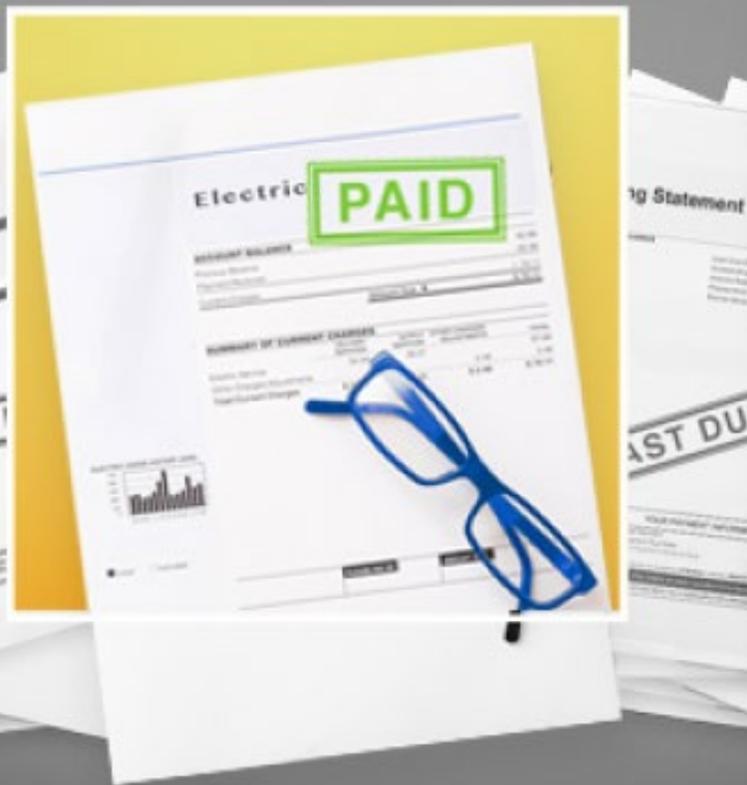
The target population includes very low-income and homeless individuals and families - **9 million of whom likely participate in TANF, SNAP, and/or Medicaid.**

CBPP and GMMB have created a campaign state agencies and others can leverage to reach non-filers with the simple message that financial help is available, encourage them to fill out the form online, and offer in-person help to do so where possible.

**YOUR \$1,200
STIMULUS CHECK
COULD PAY OFF
URGENT BILLS.**



GET \$1,200
FOR WHAT YOU NEED MOST.



“Get \$1,200 for what you need most” reinforces the point that financial help is available.

- You may be eligible for an Economic Impact Payment from the federal government. Stimulus checks start at \$1,200 and increase by \$500 for each eligible child.
- Use the money to pay bills and cover expenses – it’s cash to use on whatever you need most to help you get through these tough times.
- To sign up, go to the “Non-Filers” page on the [IRS.gov/EIP](https://www.irs.gov/EIP) website (NOTE: can be customized to local resources).

Sample Social Posts

Health Department
Today at 19:33 · 🌐

Your \$1,200 stimulus check could pay for urgent car repairs. Sign up for your economic impact payment now at [IRS.gov/EIP](https://www.irs.gov/EIP).



GET \$1,200
FOR WHAT YOU NEED MOST.

The image shows a red car with a cracked windshield. A smaller inset image shows a close-up of the cracked windshield.

Like Comment Share

1.035

Write something...

Department of Human Services
Today at 19:33 · 🌐

Your \$1,200 stimulus check could go toward credit card bills or rent. Sign up for your economic impact payment now at [IRS.gov/EIP](https://www.irs.gov/EIP).



GET \$1,200
FOR WHAT YOU NEED MOST.

The image shows a stack of utility bills, including an electric bill with a green 'PAID' stamp and a pair of blue glasses. Other bills in the background have 'PAST DUE' stamps.

Like Comment Share

1.035

Write something...

State Example
Today at 19:33 · 🌐

Your \$1,200 stimulus check could become cash in your pocket for groceries and more. Sign up for your economic impact payment now at [IRS.gov/EIP](https://www.irs.gov/EIP).



GET \$1,200
FOR WHAT YOU NEED MOST.

The image shows an open brown leather wallet with several US dollar bills (including a \$20 bill) inside.

Like Comment Share

1.035

Write something...

Toolkit Assets

- Key messaging
- FAQs
- Talking points
- Flyer and one-pager
- Template web copy
- Template e-newsletter copy
- Template email copy
- SMS copy
- Mailer copy
- Template op-ed
- Template news release
- Call center script
- Radio reader
- PSA script
- Radio spot
- Videos (:30 and :15)
- Animated digital banner
- Social graphics/posts

Sample State Agency Campaign

July

- Partner/agency outreach (introduce toolkit)
- Upload web copy
- Launch Event
- Publish news release
- Distribute radio reader

August/September

- Connect with non-filers via multiple social posts, emails, SMS, mailer
- Place op-eds

October

- Final push with earned media and paid support behind banners and radio spot

**October 15:
Tax Filing
Extension
Deadline**



211 Economic Impact Payment Helpline

Bryndan Stueve
Manager, Community Impact and Economic Mobility
United Way Worldwide



GET CONNECTED.
GET HELP.

211

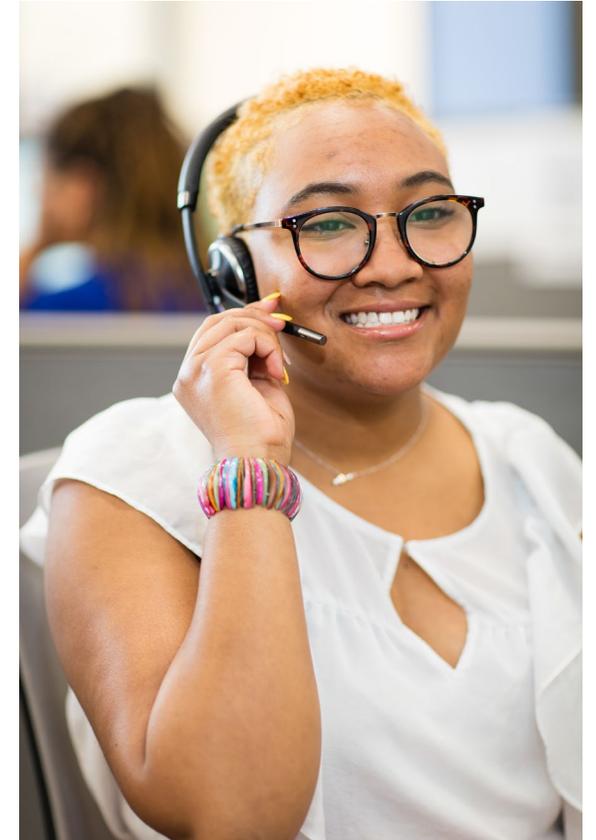
What is 211?

211 is a vital community service accessed by millions of Americans every year.

People call 211 for free, confidential help with a wide range of social services and resources, including **food, housing, utilities payment assistance, health care, transportation, child care, employment opportunities, mental health crises, disaster information and assistance**, and more.

Highly trained 211 specialists provide **expert, caring help** that addresses not only the presenting issue but underlying challenges people are facing as well. Collectively, 211s curate databases of over **950,000** programs and services nationwide.

Ensuring that people in need have access to 211 is critical to United Way's mission to fight for the health, education, and financial stability of every person in every community.



UNITED WE FIGHT.
UNITED WE WIN.

LIVE UNITED

211 Economic Impact Payment Helpline



United Way established our 211 Economic Impact Payment Helpline to provide over-the-phone assistance to anyone who needs help obtaining their Payment.

The Helpline helps callers:

- Confirm they are eligible
- Learn how to claim their EIP
- Feel confident claiming their EIP
- Successfully complete the IRS' forms
- Answer specific EIP questions

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UNITED WE WIN.

LIVE UNITED

211 Economic Impact Payment Helpline



211 EIP Helpline agents have obtained Advanced VITA certifications, and are adept at responding to technical questions and guiding callers in the use of software products and webforms using all device types (computer, tablet, mobile).

Callers are also screened for EITC/CTC eligibility, and referred to VITA services or self-prep tax filing as needed.

UNITED WE FIGHT.
UNITED WE WIN.

LIVE UNITED

211 Economic Impact Payment Helpline



Calling **1-844-322-3639** connects people to the national Helpline.

First, an interactive voice response (IVR) “bot” answers the most frequently asked questions, recognizing “plain language” speech.

For example:

- *Am I eligible to receive a payment?*
- *I moved, how will the IRS know where to send my check?*
- *When will I get my check?*

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UNITED WE WIN.

LIVE UNITED

211 Economic Impact Payment Helpline



IVR Welcome:

“Hello, thank you for contacting the 211 Helpline for Economic Impact Payments.

“First, please enter your zip code.

“Thank you. I am an automated agent that can answer many of your questions about your Economic Impact Payment.

“If I can’t answer your question, I will connect you to someone who can help.

“Go ahead and ask your question. You can say things like, ‘Am I eligible?’”

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211 Economic Impact Payment Helpline



If the IVR doesn't understand a caller's question or the caller still needs help, they will be transferred to a live agent for in-depth assistance.

- 90% of calls are answered within 90 seconds

The Helpline IVR is available 24/7. Live agents are available 10 am – 6 pm ET M-F through October 15, 2020.

After-hours callers can receive a callback the next day. Live agent hours can be expanded to meet demand.

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UNITED WE WIN.

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211 Economic Impact Payment Helpline



If the caller needs help with other COVID-19 or income supports questions, they will be transferred to the main COVID-19 helpline and, ultimately, their local 211

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211 Economic Impact Payment Helpline



Helpline Promotion

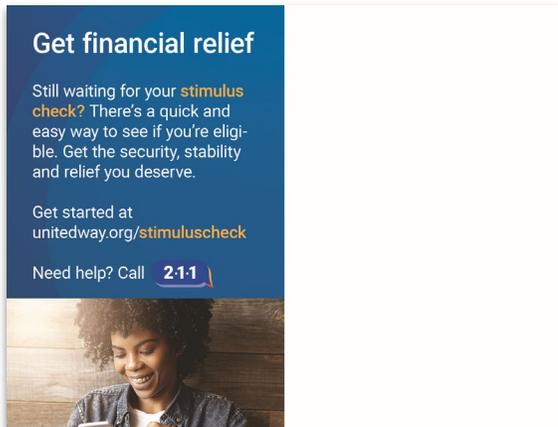
- List the 211 EIP Helpline phone number in your outreach and information materials: **1-844-322-3639**
- Link to United Way's EIP webpage: www.unitedway.org/stimuluscheck
- Share this resource freely with your clients, staff, and partners
- Unsure where to start? Review our [Outreach Toolkit](#) for sample outreach materials including postcards, emails, and social media posts

UNITED WE FIGHT.
UNITED WE WIN.

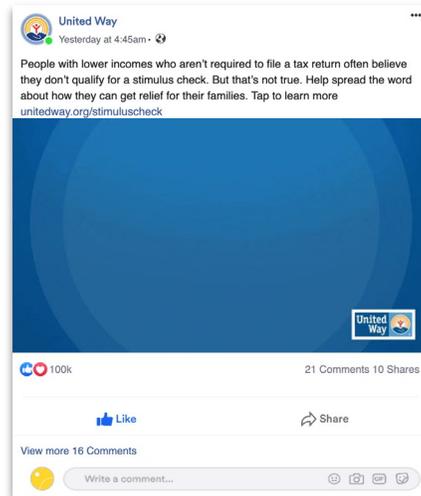
LIVE UNITED

Economic Impact Payment Outreach Toolkit

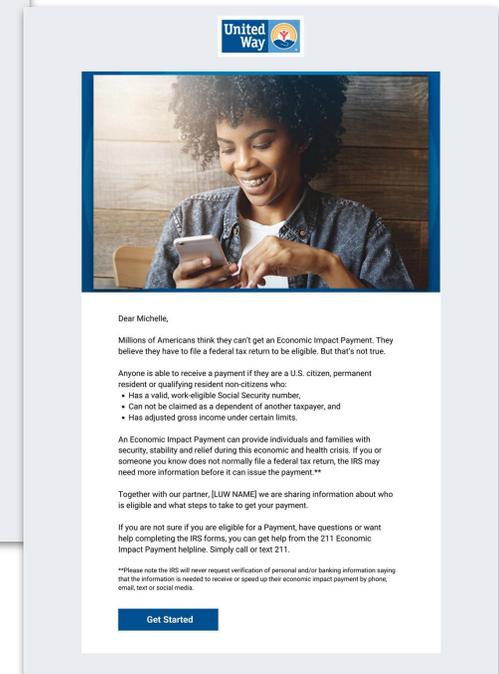
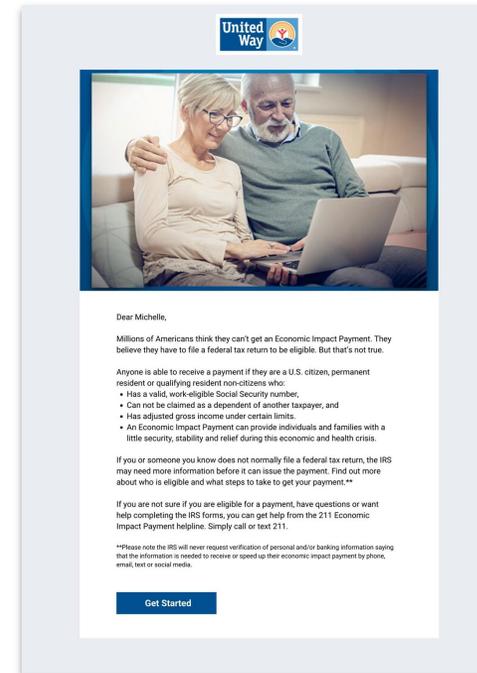
Postcard



Social



Email



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UNITED WE WIN.

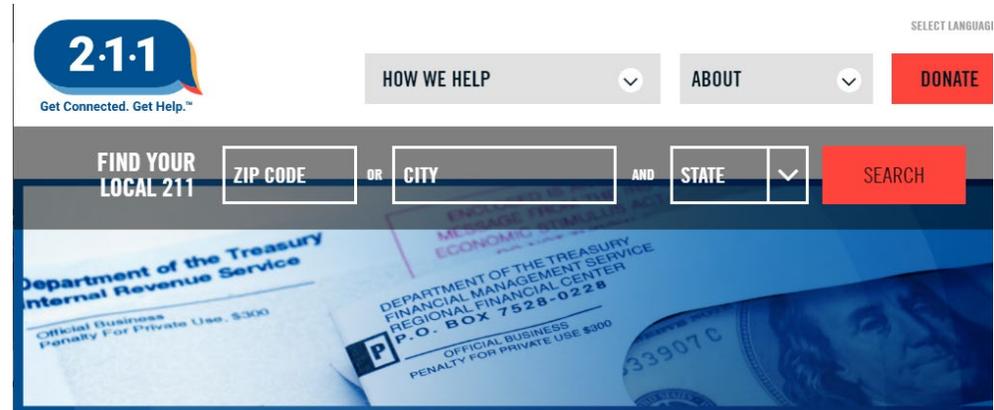
LIVE UNITED

211 Economic Impact Payment Webpage

211.org

- General COVID-19 information and resources
- Economic Impact Payment page with additional FAQs
- Ability to search for and contact your local 211

www.unitedway.org/stimuluscheck



HOW TO ACCESS YOUR STIMULUS CHECKS



Most Americans qualify for an Economic Impact Payment, but some will have to take action to get their Payment

The \$2 trillion CARES Act that Congress passed in March is providing immediate financial relief to millions of Americans to help manage the impacts of the COVID-19 health and economic crisis. Most individuals will receive a \$1,200 Economic Impact Payment from the IRS, with married

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UNITED WE WIN.

LIVE UNITED

Economic Impact Payment Learnings

Key Learnings

- People are looking for good Economic Impact Payment information
 - 24MM+ impressions in 3 weeks
 - 50k+ page views per week
 - Outreach efforts are exceeding industry benchmarks
- “Stimulus Check” language performs better than “Economic Impact Payment”

UNITED WE FIGHT.
UNITED WE WIN.

LIVE UNITED

211 Economic Impact Payment Helpline

Thank you!

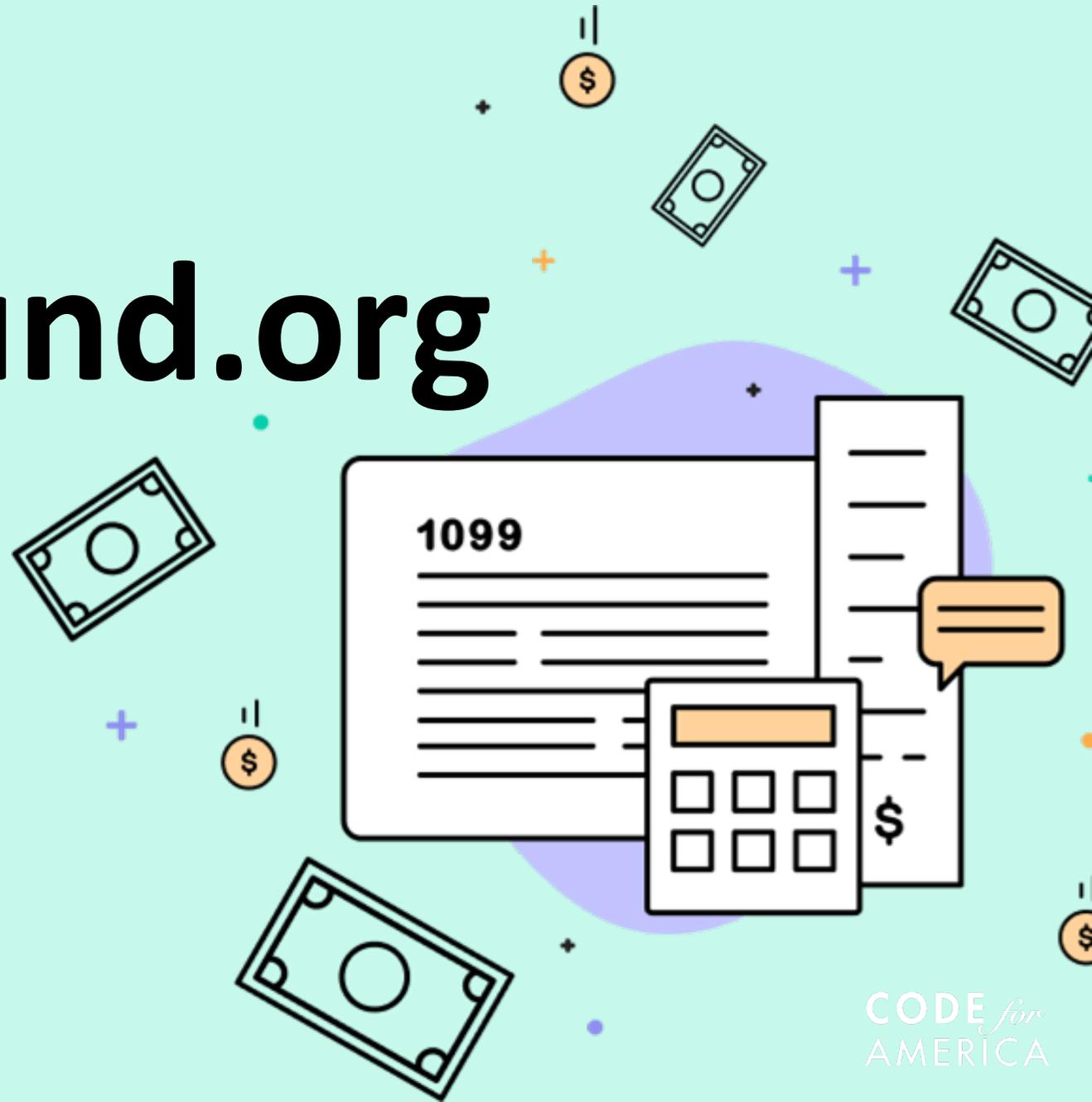
Please contact me with your questions, comments, and suggestions, or to let me know how you're incorporating the 211 Economic Impact Payment Helpline into your outreach efforts.

Contact:

Bryndan Stueve
Manager, Community Impact and Economic Mobility
United Way Worldwide
bryndan.stueve@uww.unitedway.org

GetYourRefund.org

6/23/20

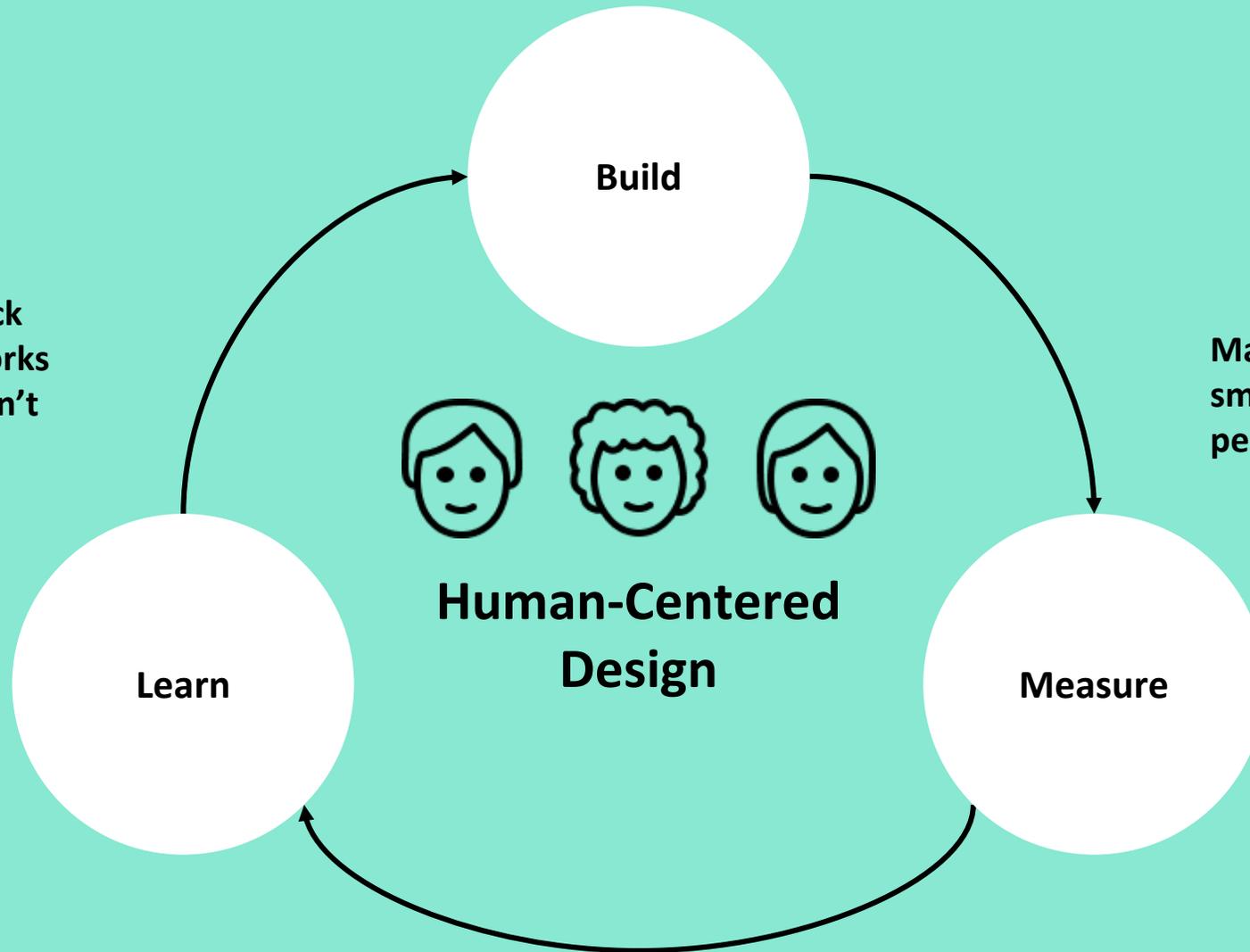




Code for America is a nonprofit organization that partners with government to strengthen the delivery of public services through human-centered technology.



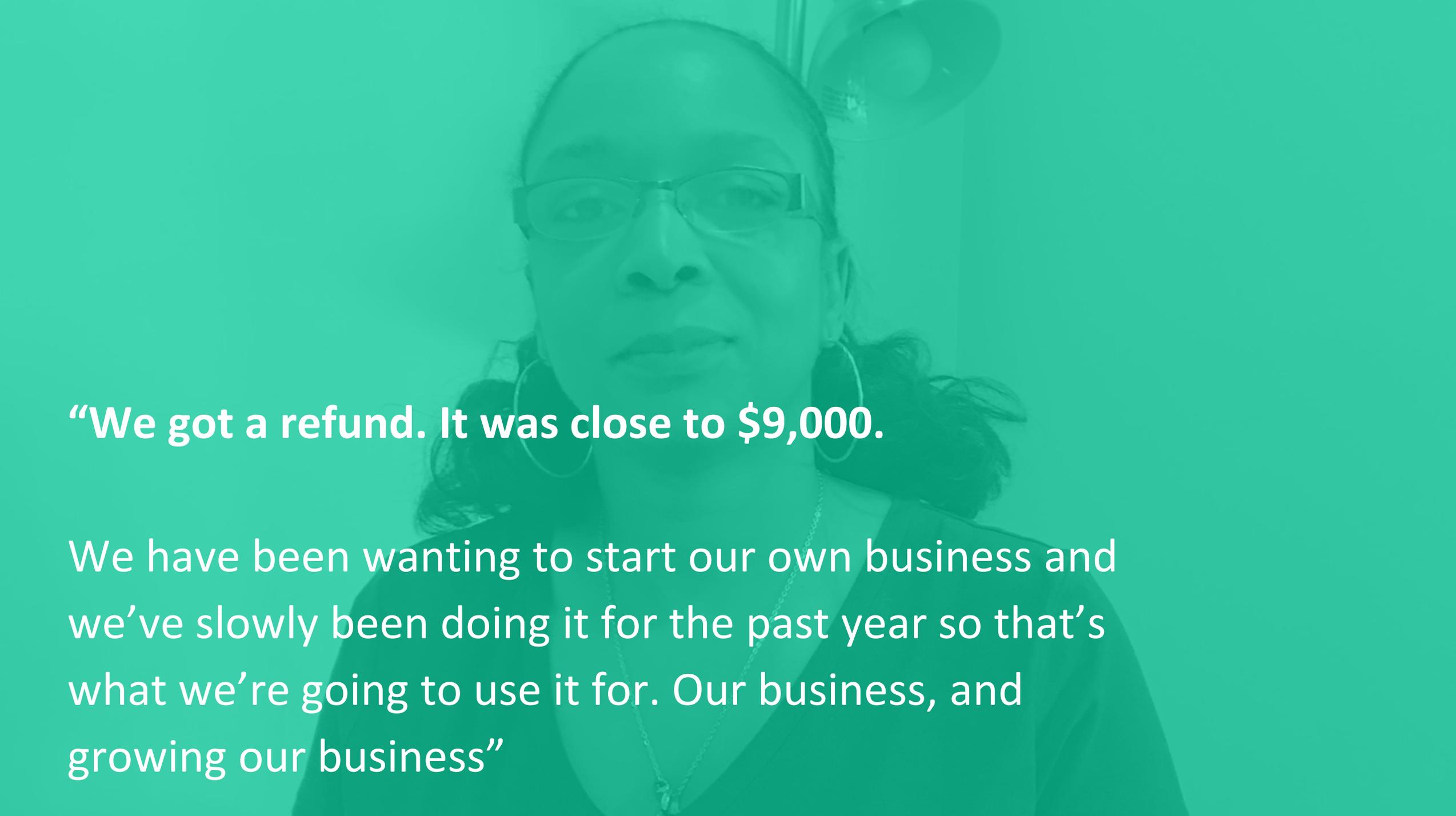
Collect feedback
about what works
and what doesn't



Make something
small to meet
people's needs



Observe people using
what you made



“We got a refund. It was close to \$9,000.

We have been wanting to start our own business and we’ve slowly been doing it for the past year so that’s what we’re going to use it for. Our business, and growing our business”

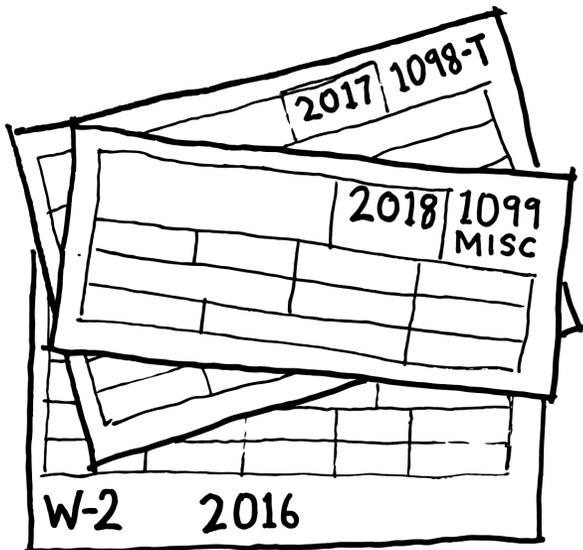
Free &
Trustworthy



Clarifying



Thorough

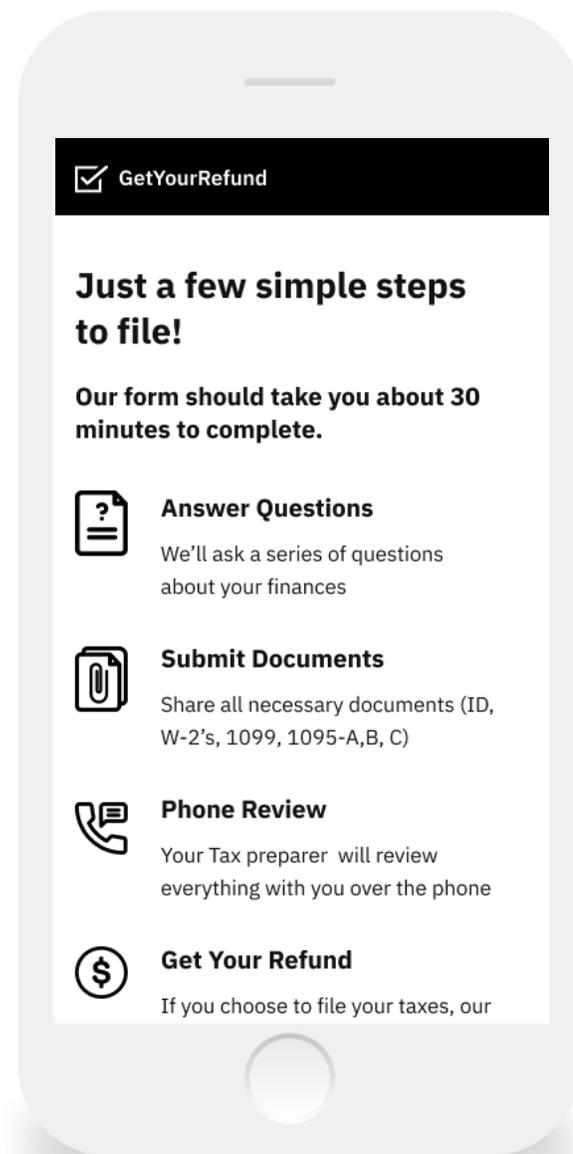
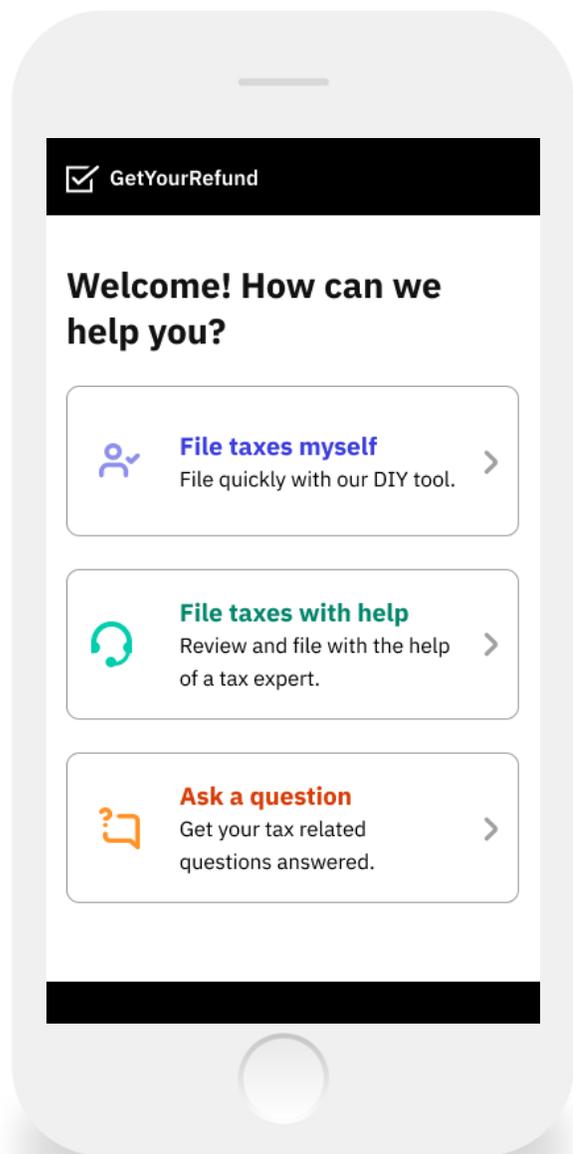
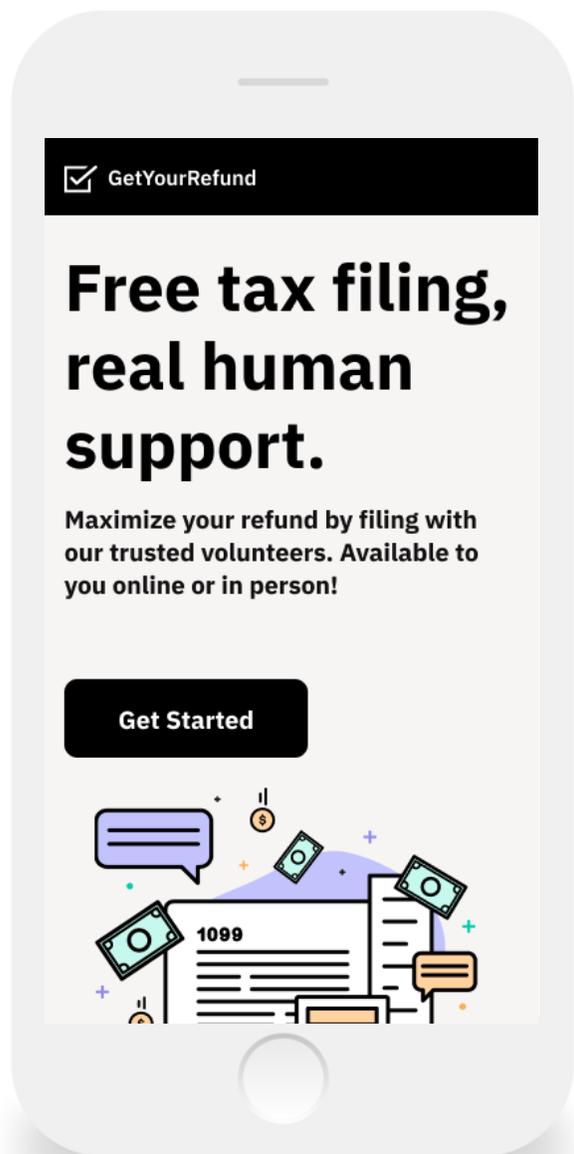


Accessible
whenever,
wherever



**How might we collaborate with
VITA to help more eligible
households receive the EITC?**

***while keeping what makes VITA great!**

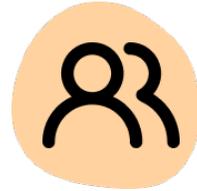


Original Pilot Goals



Prep 5,000 returns

Prove that we can help
people securely
through digital VITA



**Reach new, high need
clients**

non-filers, # claimed
EITC



**Partner with 4 VITA
sites**

Collaborate with and
learn from 4 VITA
partners in diverse
contexts



**Improve efficiency of
VITA**

returns / volunteer
hour or site YOY

**New opportunity:
Introduce new clients to VITA
by helping them access
Economic Impact Payments**

To meet the demand for tax prep services, we'll need more capacity and new service offerings.

Triaging clients to the right level of service



VITA Location Finder

Help clients connect to in-person VITA sites near them



Valet VITA

Provide an easy way for VITA sites to manage dropoff/valet sites using Zendesk



Digital Intake

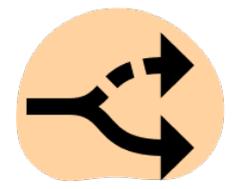
Support fully digital end-to-end VITA, and scale our pilot faster than we ever imagined



DIY w/ Help

Collaborate with VITA partners to provide support to clients using the TaxSlayer FSA.

(Encourage this option for those with simple returns, and prioritize high-touch service for those who need it most)



Service Routing

Help clients find the service right for them. Leverage FAQ's, link to key IRS tools, and provide chat support with VITA-certified volunteers.

GetYourRefund.org

Full Service Digital VITA

Safeguarding client data



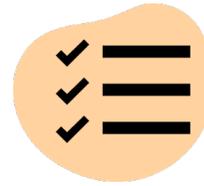
End-to-end Encryption

GetYourRefund does not permit any network connections without strong encryption protocols.



Secure, isolated infrastructure

Taxpayer information is stored in an encrypted database that is protected from external networks and then relayed to Zendesk.



Multi-factor access control

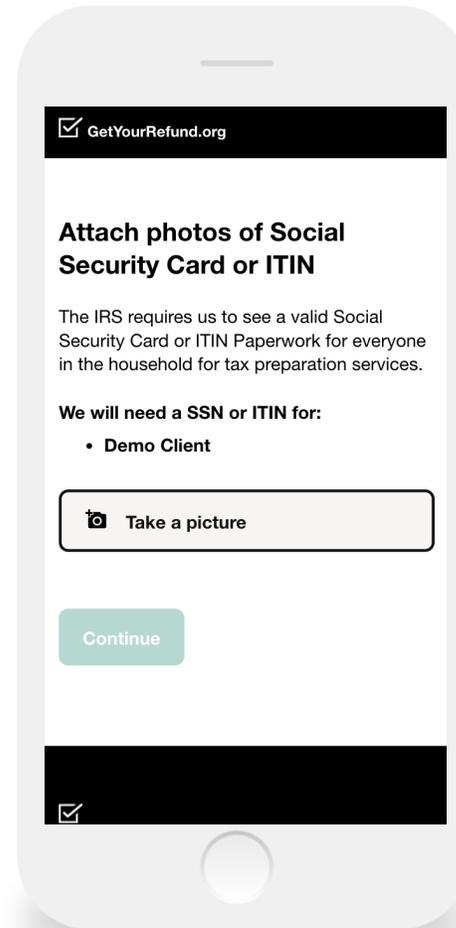
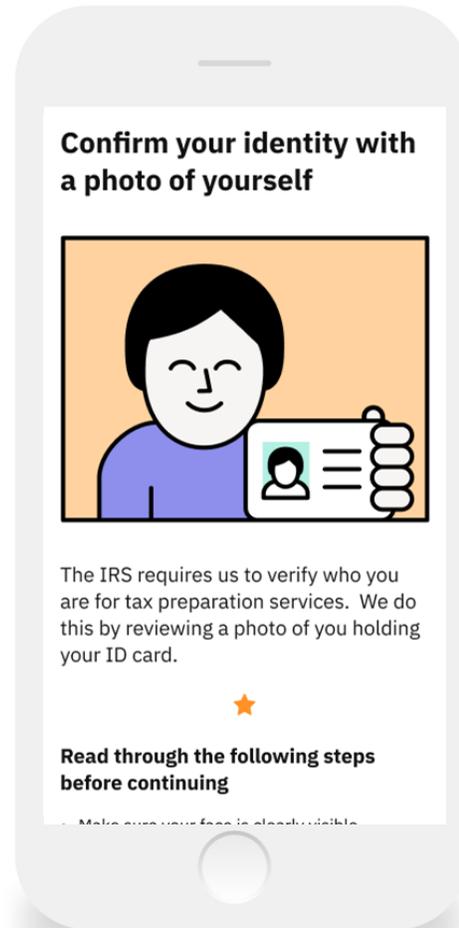
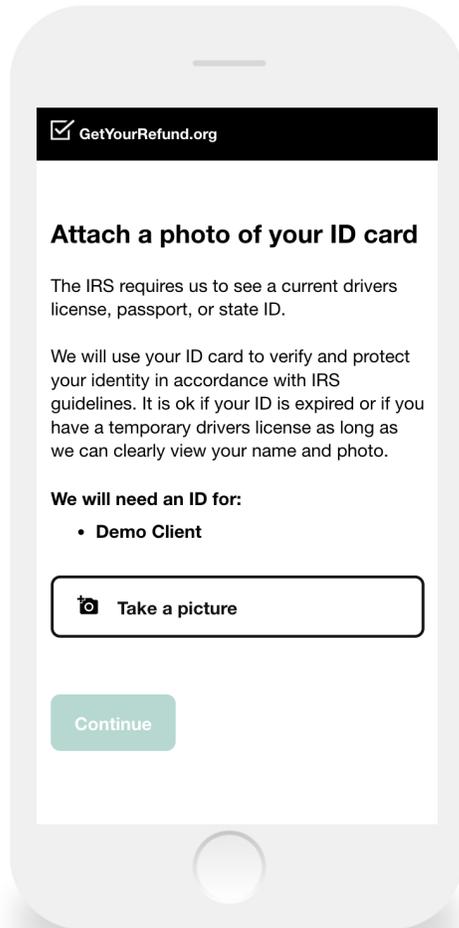
In order to view taxpayer information in Zendesk, all volunteers and staff are required to authenticate using two-factor authentication.



Industry best practices

We are targeting compliance with ISO-27001 and SOC 2 security standards, which include regular threat modeling, penetration testing, and incident response protocols.

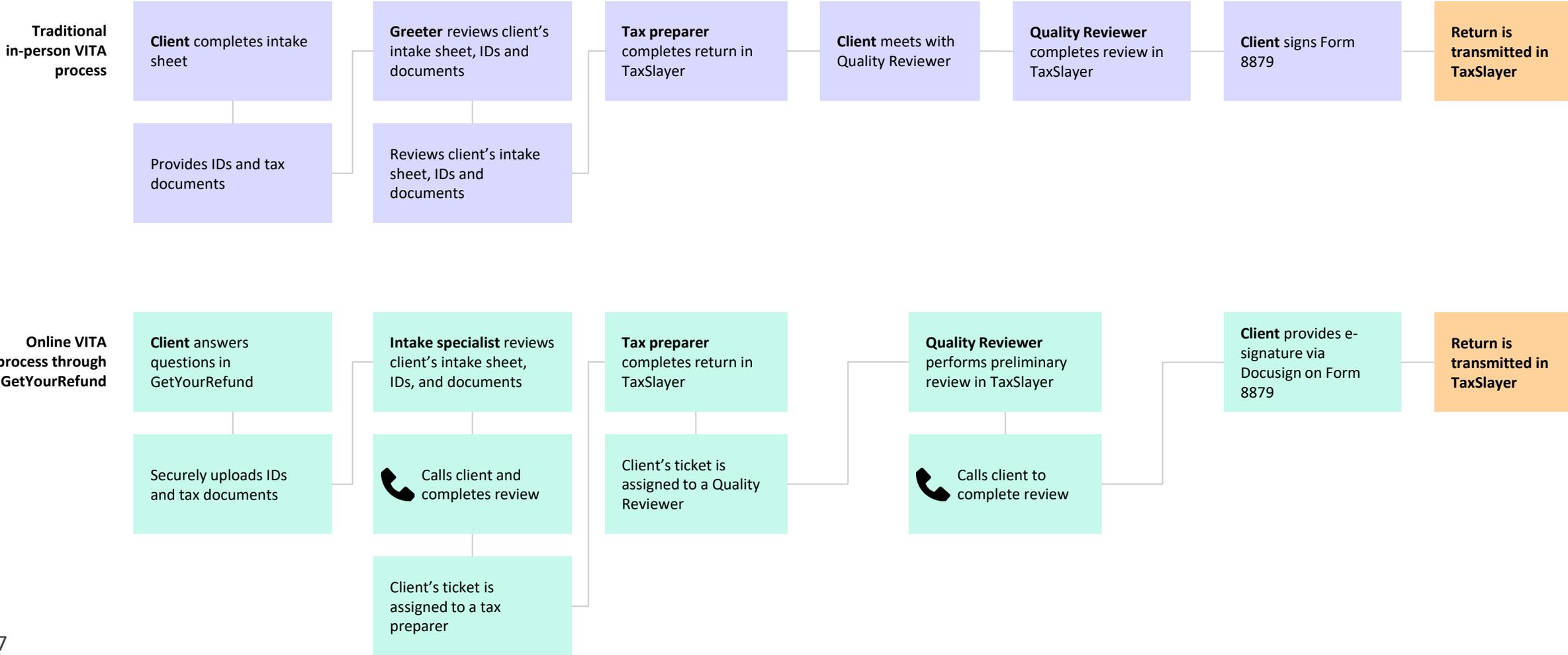
Identity Verification



- **Government picture identification, with a “selfie” holding their ID for all tax filers**
- **Social Security Card or ITIN paperwork for all household members**
- **IP address is included with consent form**
- **Last four of SSN is used as a passcode for phone calls and DocuSign**

Process Comparison:

Traditional VITA vs GetYourRefund



What VITA sites need to participate



VITA certified volunteers, site coordinator, and intake specialist.



Laptops with anti-virus software and secure internet (an additional monitor is helpful).



TaxSlayer or other tax prep software.



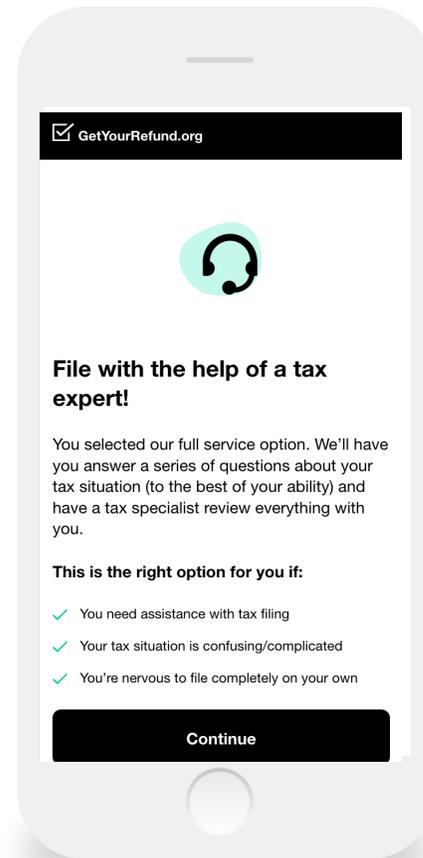
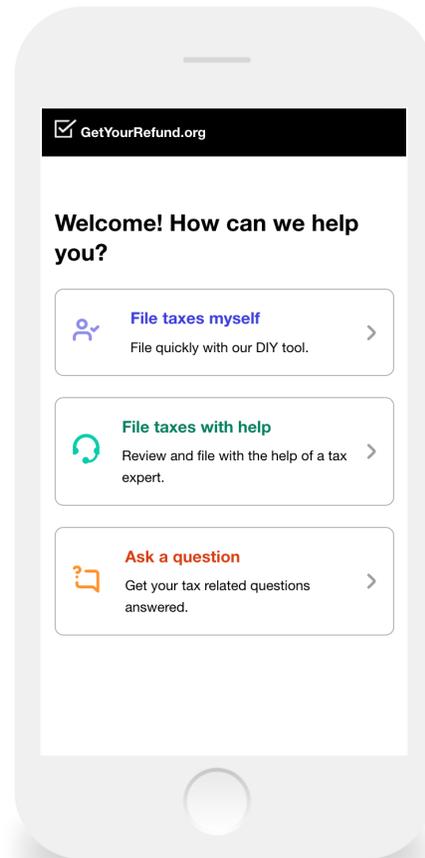
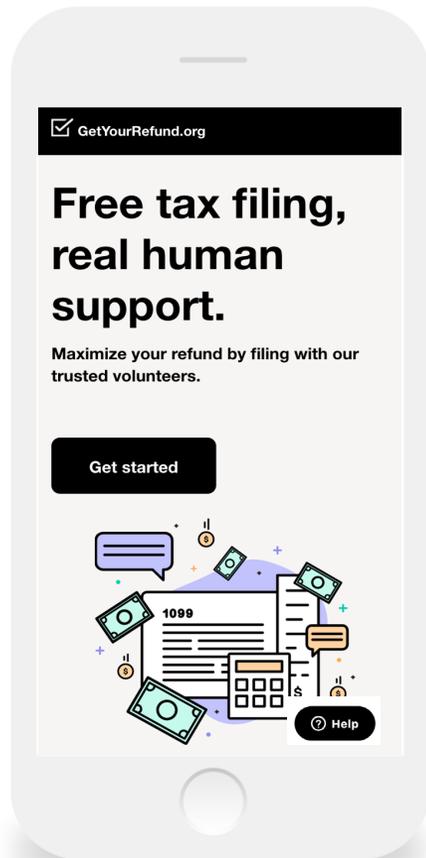
A digital outreach plan.



A flexible, can-do spirit!

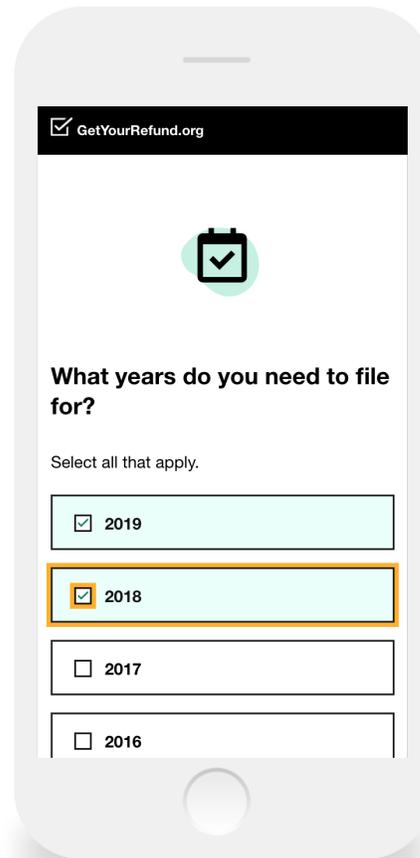
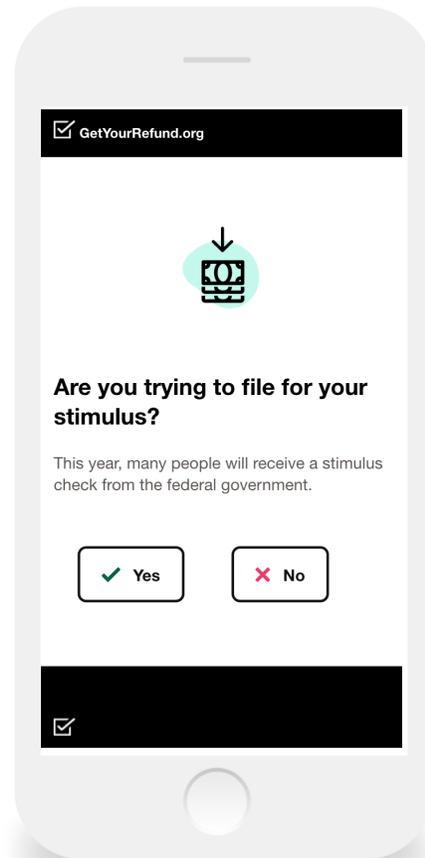
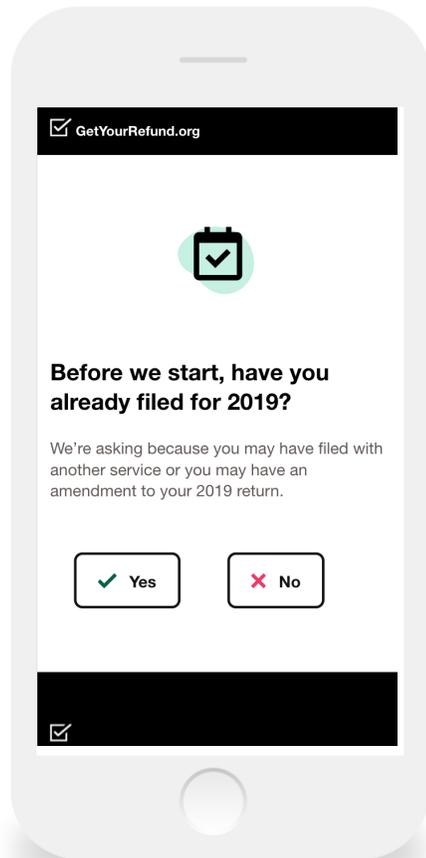
We provide GetYourRefund website, Zendesk, DocuSign, Slack, and volunteer training videos at no cost to VITA partners.

Getting Started



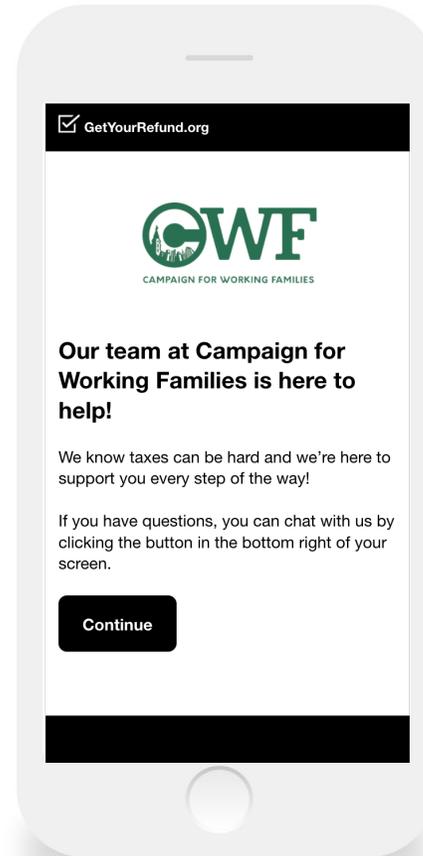
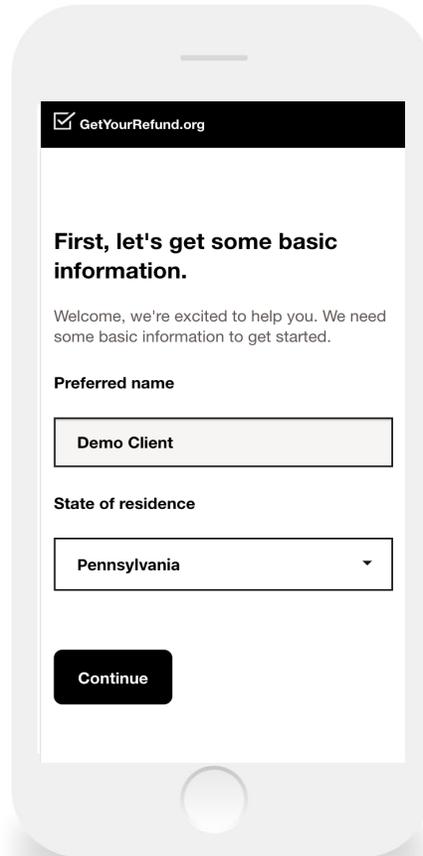
- Available on any device (desktop, mobile, tablet)
- Accessible with a screen reader
- Option to Chat with us or submit a question throughout
- Adding Spanish support in early June
- Use demo.GetYourRefund.org to try it out!

Assess needs



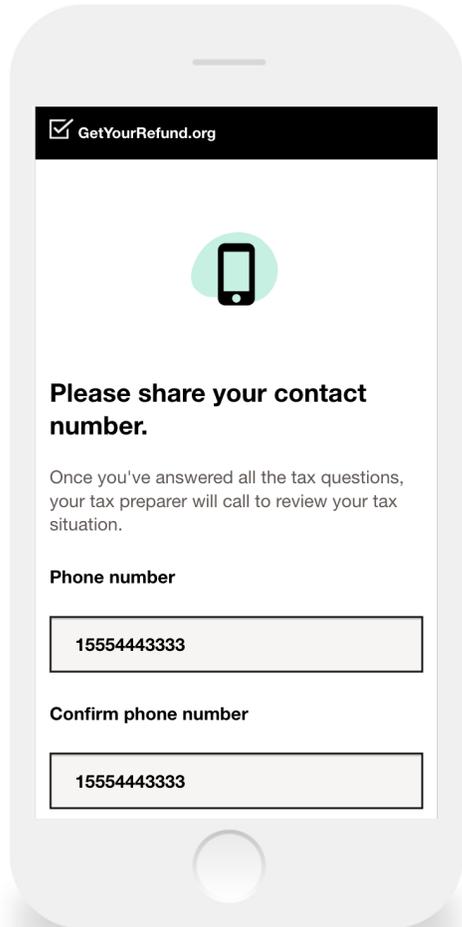
- We ask questions to direct clients to the right service
- We can help file for previous years
- Check for VITA eligibility

Route to your site



- We route to a site by using a unique GetYourRefund link for your site or the state of the return
- We show the client the site that will be assisting them

Contact Info



GetYourRefund.org

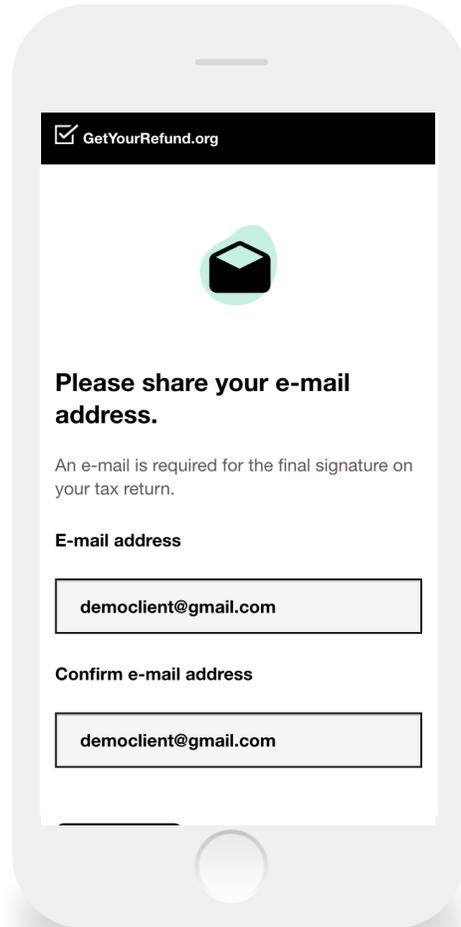


Please share your contact number.

Once you've answered all the tax questions, your tax preparer will call to review your tax situation.

Phone number

Confirm phone number



GetYourRefund.org

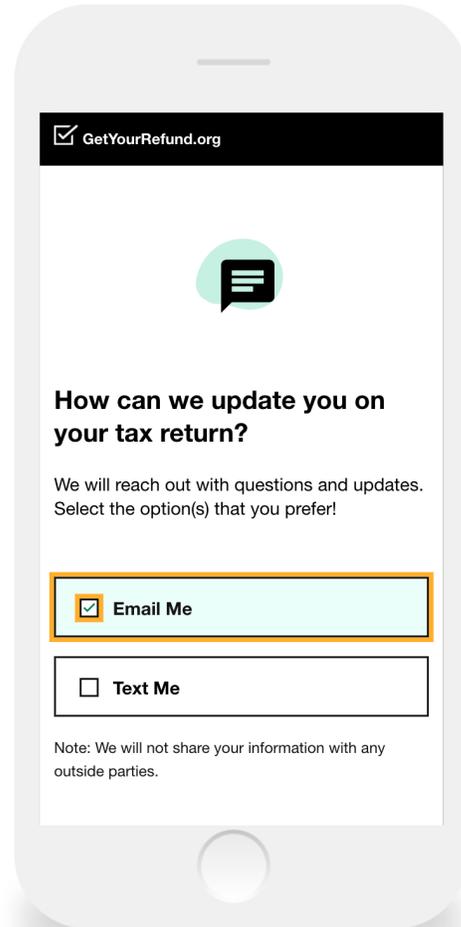


Please share your e-mail address.

An e-mail is required for the final signature on your tax return.

E-mail address

Confirm e-mail address



GetYourRefund.org



How can we update you on your tax return?

We will reach out with questions and updates. Select the option(s) that you prefer!

Email Me

Text Me

Note: We will not share your information with any outside parties.

- A phone number is required for the intake and quality review phone calls
- Email is required for us to securely send the final return and form 8879 through DocuSign
- Client chooses text and/or email communications for updates

Client Consent

GetYourRefund.org

Great! Here's the legal stuff...

You understand the information you provide this site (GetYourRefund.org) is sent to a Volunteer Income Tax Assistance (VITA) preparation site in order for an IRS-certified volunteer to review your information, conduct an intake interview on the phone, prepare the tax return, and perform a quality review before filing your taxes.

You agree to the terms of the GetYourRefund privacy policy at www.GetYourRefund.org/privacy

By proceeding, you confirm that the following statements are true and complete to the best of your knowledge.

The Details

I understand that I must provide all required

Legal first name

Legal last name

Last 4 of SSN/ITIN

Date of birth

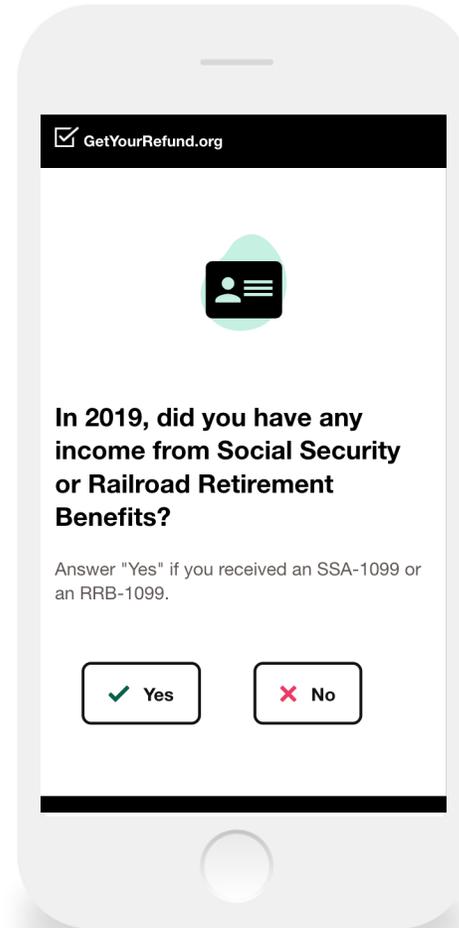
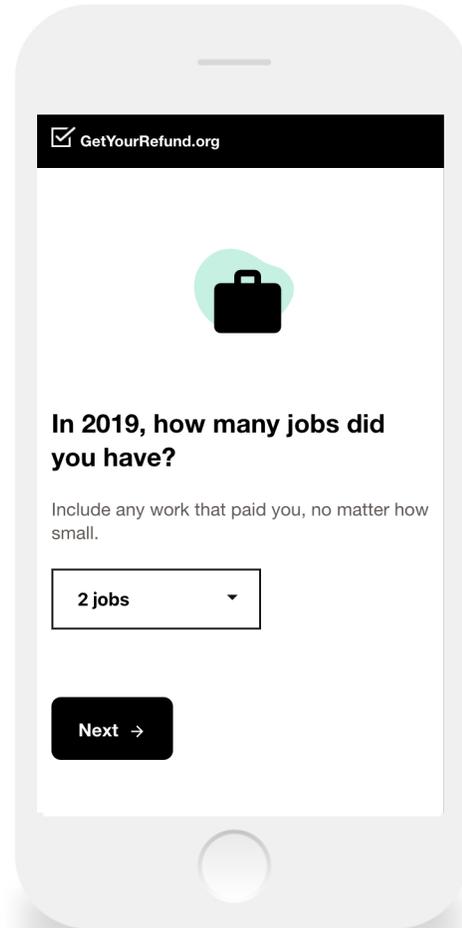
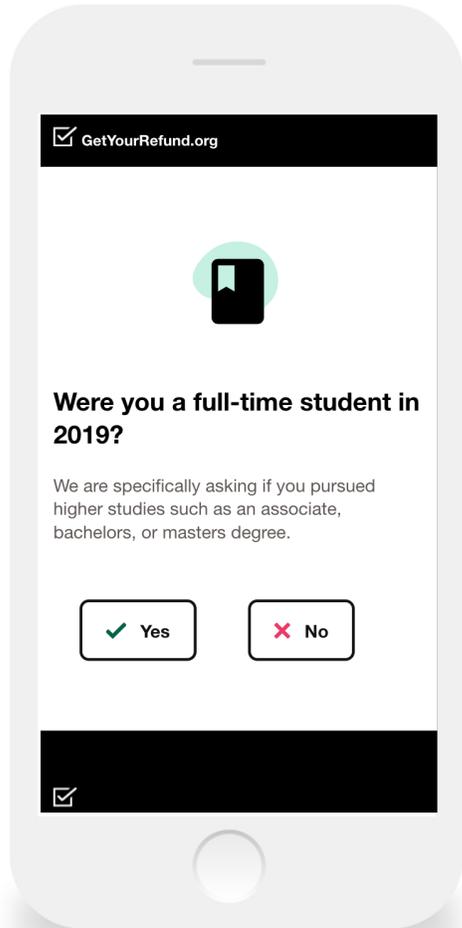
Month Day

Year

I agree

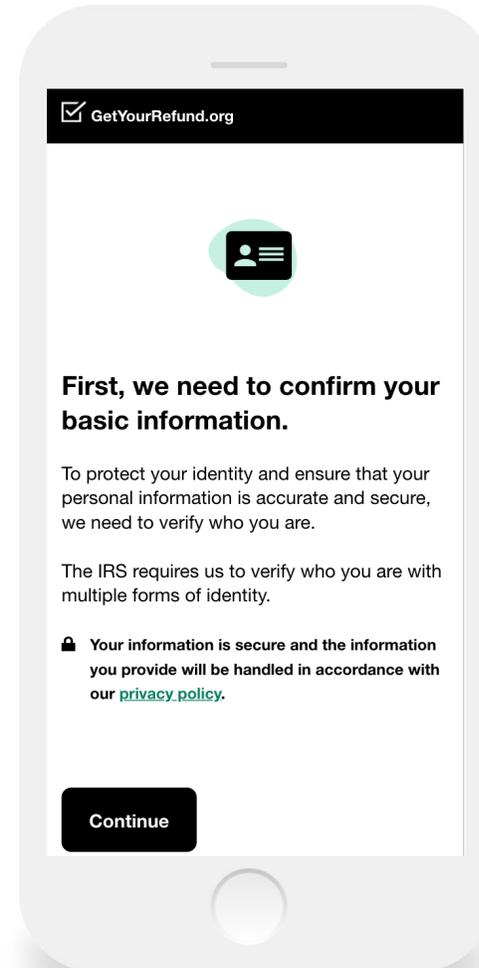
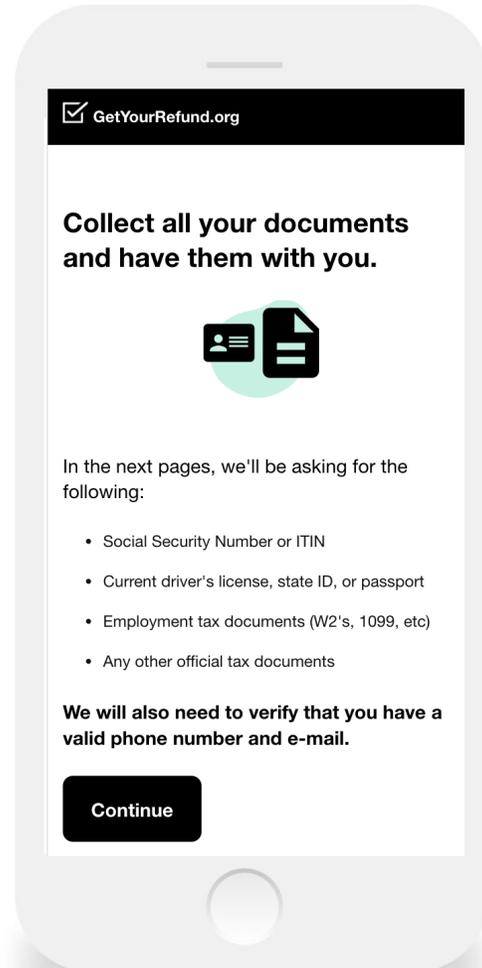
- Client reviews our consent form (version of form 14446 with details on the GetYourRefund process)
- If the client agrees, a PDF of the consent form is attached to their information in Zendesk

13614-C Questions



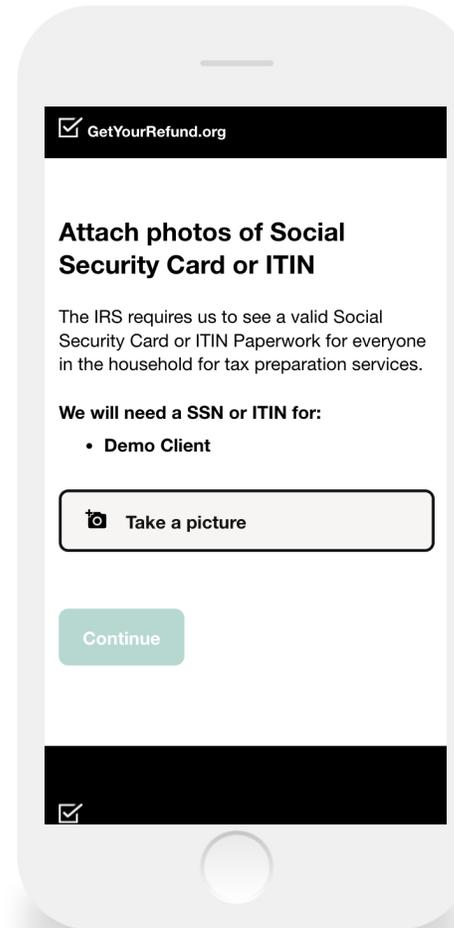
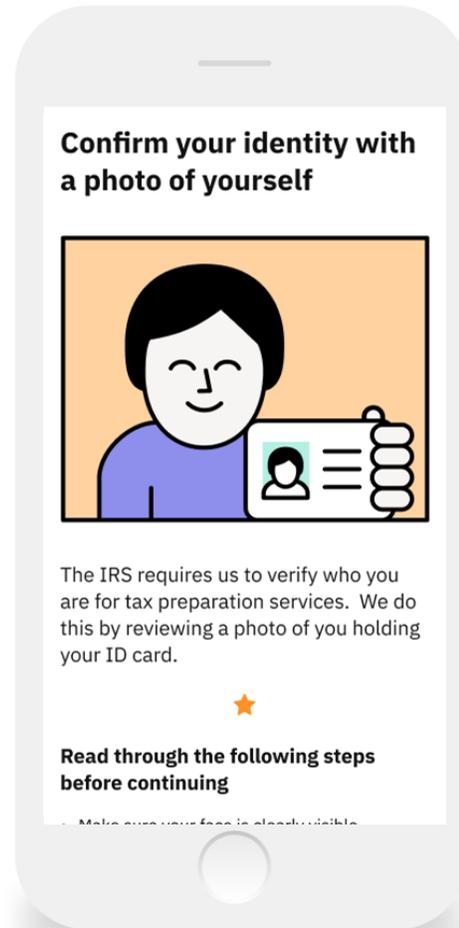
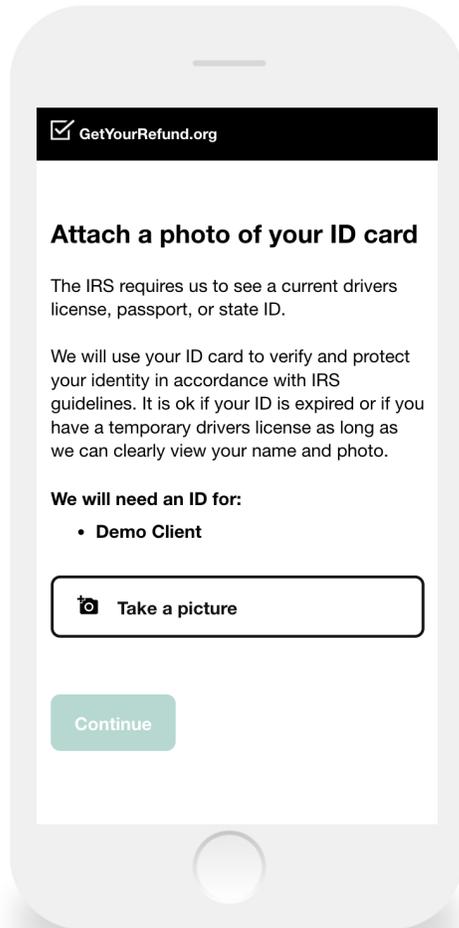
- We ask every question from form 13614-C
- We have help text to help provide more information
- The client's answers populate a 13614-C PDF that is attached for the VITA site to review

Gather Documents



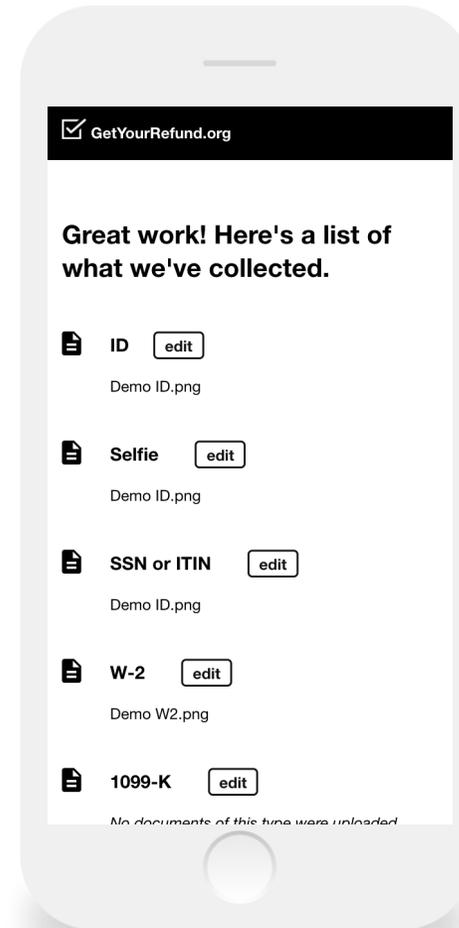
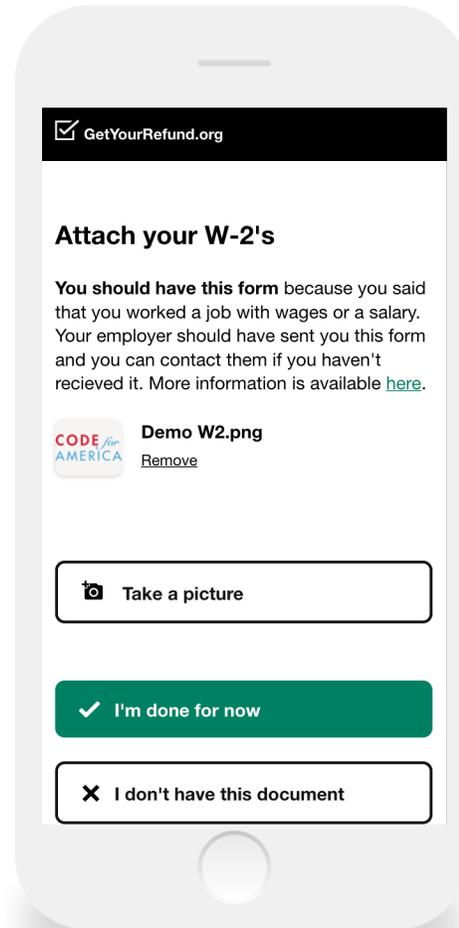
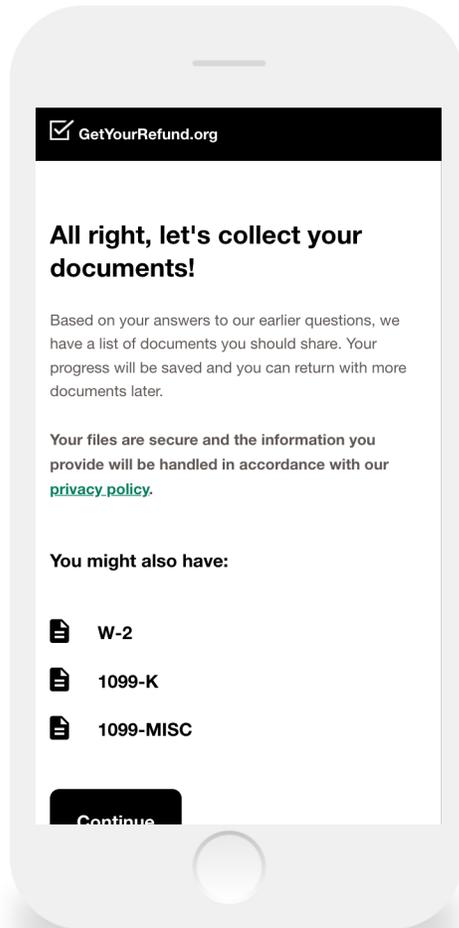
- **We ask the client to gather their tax documents and identity verification documents**
- **They will be asked to securely upload their information**
- **Information is securely stored and encrypted**

Verify Identity



- We require that clients upload a photo of an ID and a photo of the social security card or ITIN paperwork for the primary filer (and spouse if applicable)
- Clients also must upload a photo of themselves holding their ID to ensure the person completing the form is the primary filer
- Intake specialist confirms ID
- Client later uploads social security cards or ITIN paperwork for dependents

Secure Upload



- **We ask for documents the client must and might have based on the answers to the 13614-C questions**
- **Photos can be uploaded from desktop files or added directly from a phone camera**
- **We never ask for files via email and text. If more documents are needed, sites send a link to a secure file upload location.**

Final Questions

GetYourRefund.org



Do you have any time preferences for your interview phone call?

Please provide 2-3 times you are available. For example, "Tuesday or Thursday evenings". We'll pass this info along to your interviewer. There is no guarantee that they will be able to call you at your preferred time.

Continue →

GetYourRefund.org



If due a refund, how would like to receive it?

Direct deposit (fastest)

Mail me a check (slower)

Continue

GetYourRefund.org



What is your mailing address?

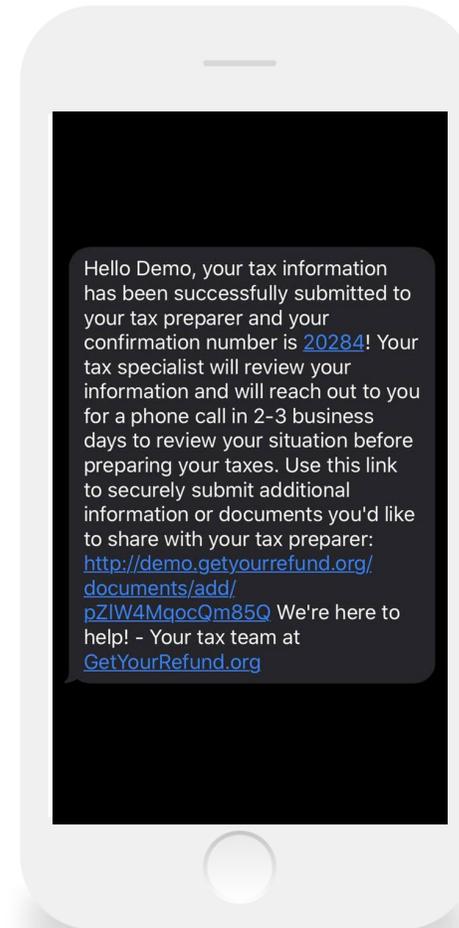
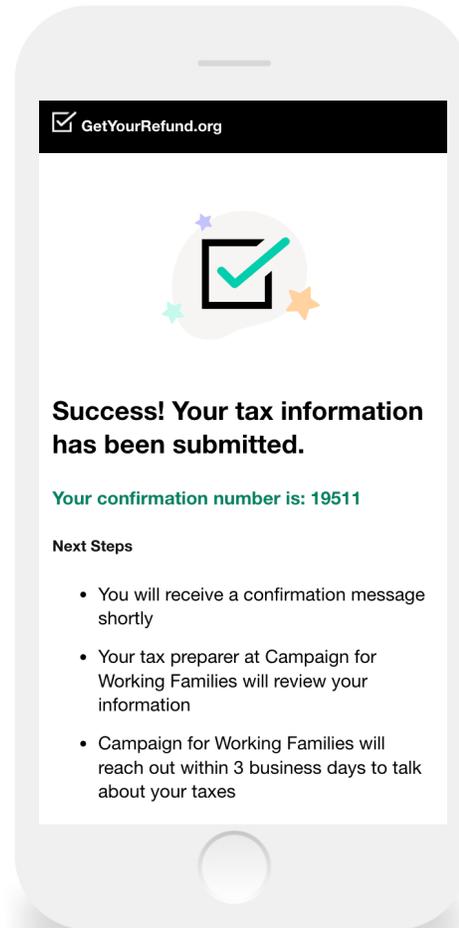
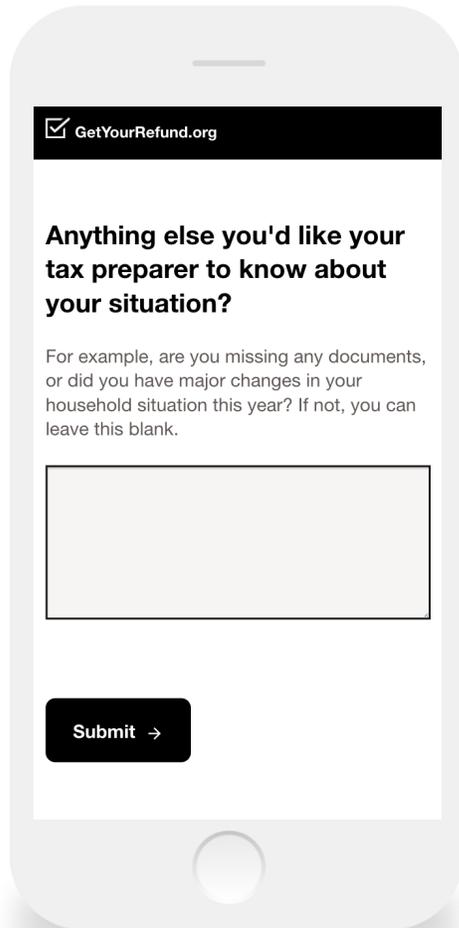
Street address

City

State

→ **We ask for a phone call time preference, information about where to send a refund, direct deposit information, and additional demographic questions**

Submit

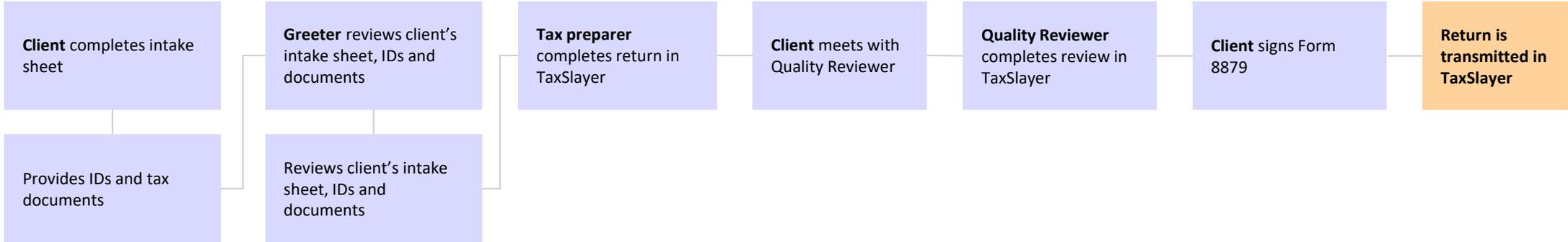


- Once the client submits, they get a confirmation number and confirmation message (text or email depending on preferences)
- Their VITA site will reach out within 2-3 business days to schedule a phone call

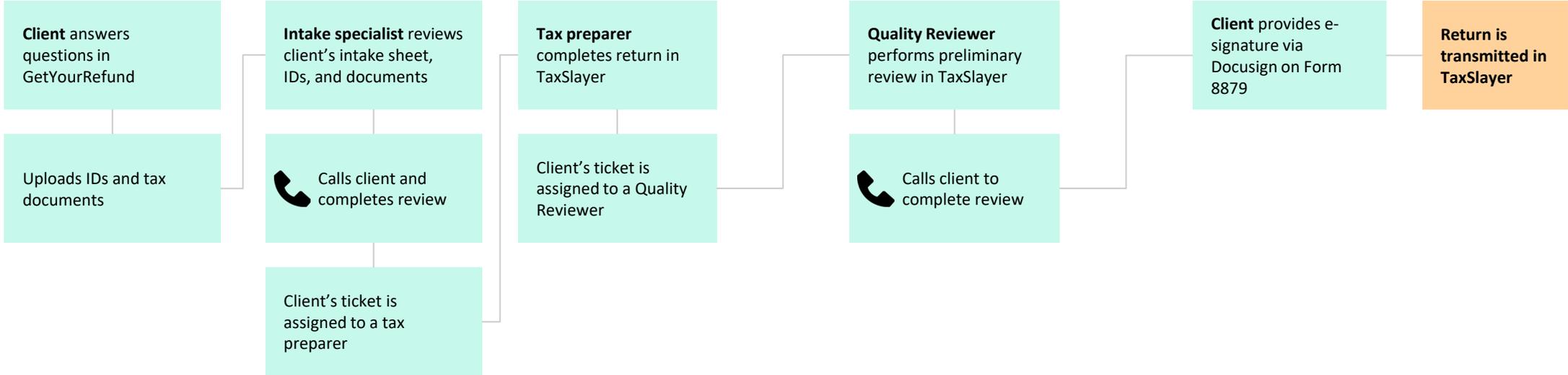
Process Comparison:

Traditional VITA vs GetYourRefund

Traditional in-person VITA process



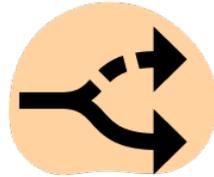
Online VITA process through GetYourRefund



The role of Zendesk



Collate client information and documents needed for preparation.



Define and track the client's path through the virtual process.



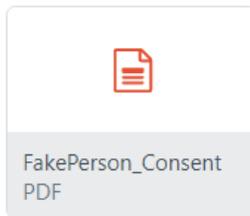
Facilitate secure communication between the volunteer and client.



Help maintain consistency in process and messaging.

Initial Review

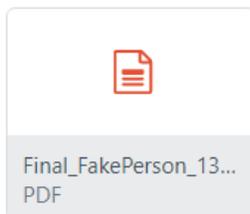
 Updates (assign)
Signed consent form



 Updates (assign)
Online intake form submitted and ready for review.

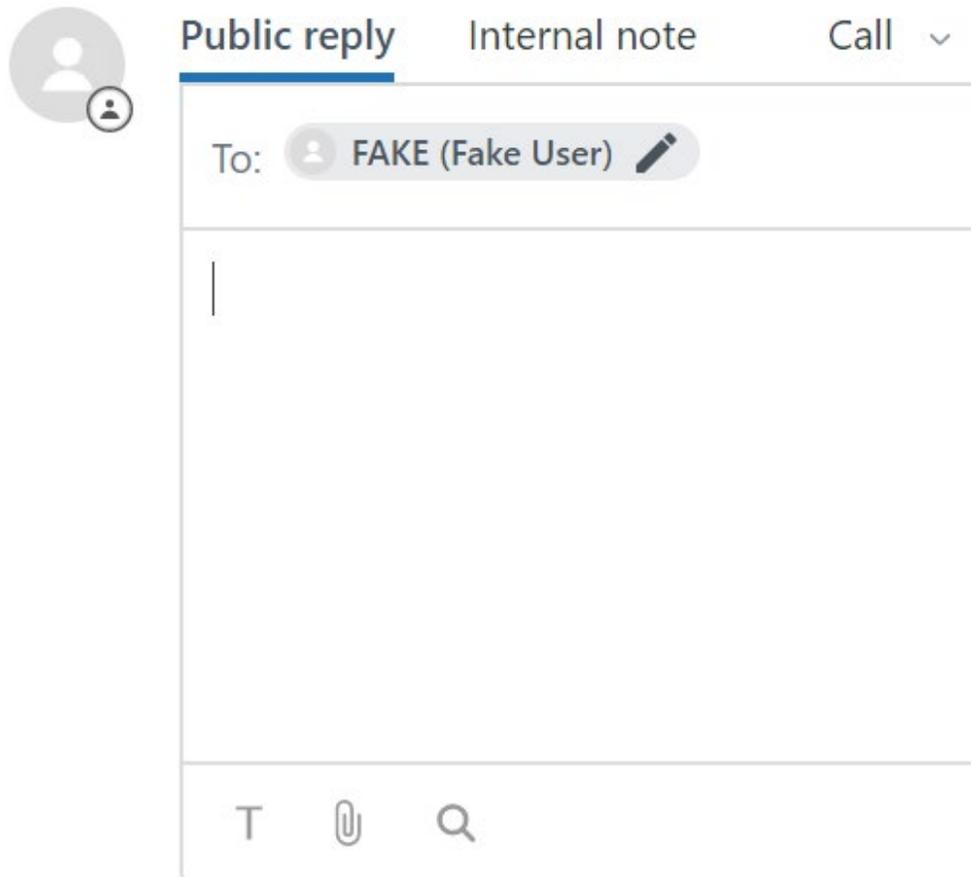
Client's provided interview preferences:

Additional information from Client:



- **The Intake Specialist reviews the client's intake sheet, IDs, and documents**
- **If more information is needed, volunteers can text or email the client through Zendesk**
- **Clients can submit additional documents through a secure link**

Intake Interview



- **The Intake Specialist schedules a call with the client to ensure information is complete and accurate**
- **The call is placed through Zendesk**
- **The last 4 digits of the SSN is used as a unique passcode**
- **When the call is finished, the ticket is assigned to a Tax Preparer**

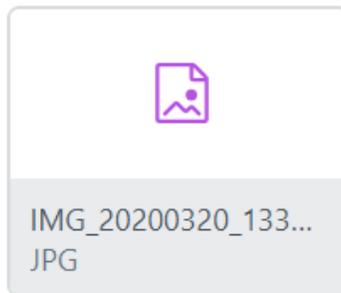
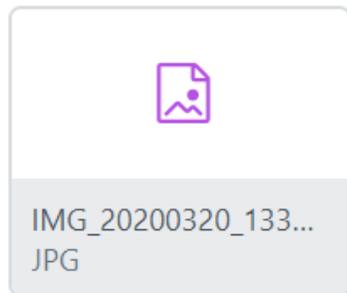
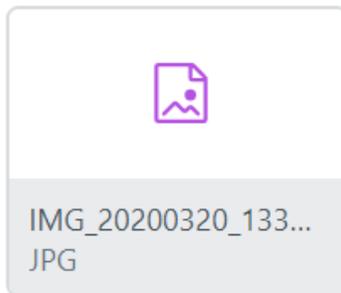
Return Preparation



Updates (assign)

Documents:

- * IMG_20200320_133824.jpg (W-2)
- * IMG_20200320_133824.jpg (1099-MISC)
- * IMG_20200320_133824.jpg (1099-R)
- * IMG_20200320_133824.jpg (Other)



- **The Tax Preparer uses the 13614-C and documents to complete the return in TaxSlayer**
- **The Tax Preparer can communicate with the client through Zendesk to request information or documents at any time**
- **Once the return is prepared, the ticket is assigned to a Quality Reviewer**

Quality Review



Demo Site Coordinator (assign)

To: Fake Person [Show all](#)

Outbound call to +1



Call Details

Call from: +1

Call to: +1

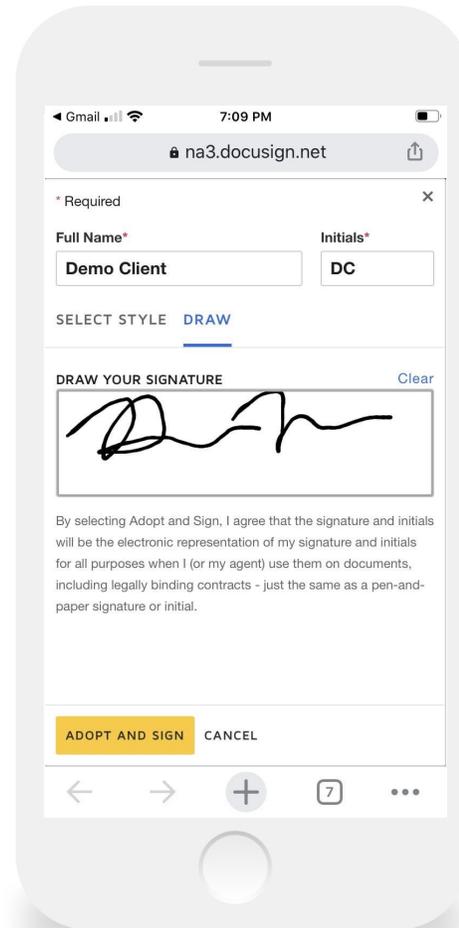
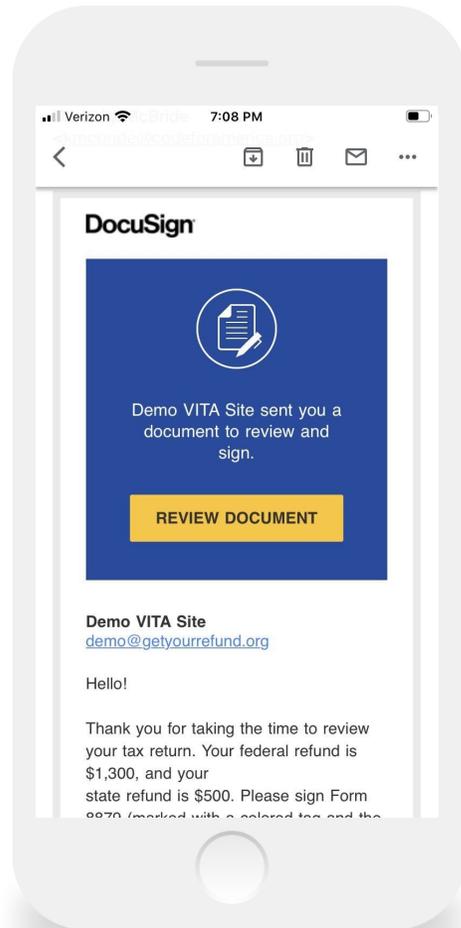
Time of call: June 01, 2020 04:00:42 pm

Answered by: Demo Site Coordinator

Length of phone call: 31 seconds

- **The Quality Reviewer completes a preliminary review in TaxSlayer**
- **The Quality Reviewer calls the client through Zendesk to complete the review**

Client Signature



- The completed federal and state returns are sent to the client via DocuSign with a passcode (last 4 of SSN)
- The client signs Form 8879 and downloads a PDF of their return for their records
- Volunteers are alerted that the signature is complete

E-File



Site Coordinator

Request for more information

Ready for E-File

Return Filed

Return Accepted

Return Rejected

- **The ERO transmits the return and updates Zendesk**
- **When the IRS and state acknowledgements are available, the Zendesk ticket is updated accordingly**
- **The client receives confirmation that their returns were accepted**

Initial results

GetYourRefund Client Stories



Average 9.5/10 recommend

This is a stressful time - clients need their refunds, economic impact payments, and are struggling with the mental and emotional energy to file.

"Is there still time to get the stimulus check deposited in a reasonable amount of time? If I have to wait months for the money, then it doesn't make sense to stress about getting my 2018 or 2019 taxes filed. I have so much to do. I have to make decisions about where I put my focus because I'm very overwhelmed."

Our personal touch is really important, and it builds fluency in taxes that clients have never had before

"They answered my questions and I, again there's so much I don't understand about taxes and so they were really helpful and knowledgeable, they explained to me where each number was coming from and all that. It was an easier process than I thought and I appreciated all the follow ups and stuff over email. That felt supportive and there was people actually making sure that I was getting it done."

We are scaling quickly

4,450

GYR returns
(556/4450 are prior
year returns)

7,000+

clients requesting
DIY link via email

31,730+

Visits to the Stimulus
FAQ page

302,000+

Unique visitors to
GetYourRefund.org

We are reaching new clients

33%

Clients who submitted looking for help with **prior years in May**

34%

Percent of filers we surveyed who **learned about GetYourRefund from a source other than a VITA site** (through a family member or friend, EBT apps, Google search, Facebook ad)

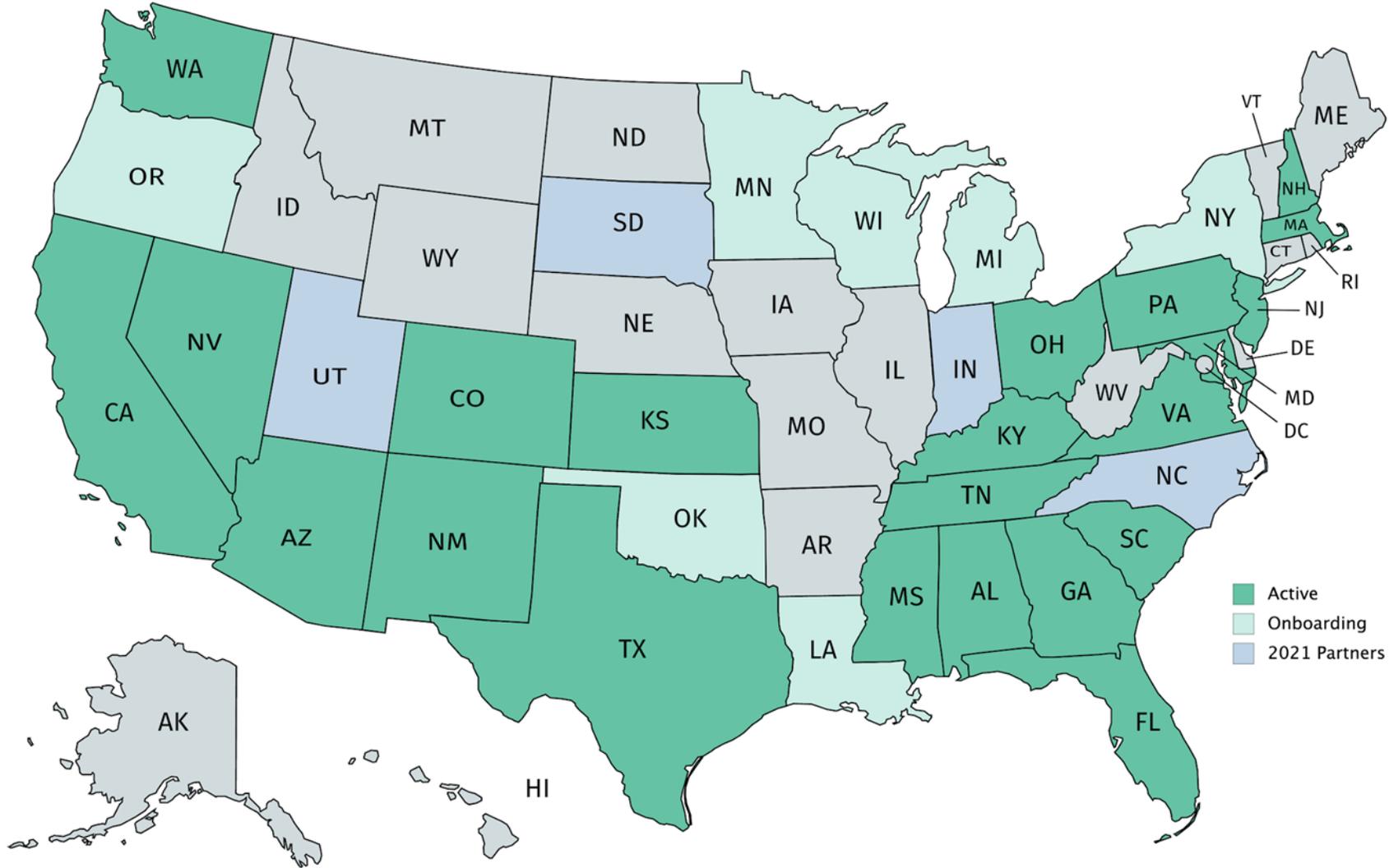
18%

Percent of filers we surveyed in the last 3 weeks who found out about GetYourRefund.org **from a friend or family member**

12%

Percent of filers we surveyed who came to GetYourRefund for **something other than filing** (had a question or looking for advice) that decided to file

We are rapidly onboarding new partners



- **34 active partners, 22 in training**
- **872 volunteers trained and active in Zendesk**
- Partners see GYR as a **critical way to expand services in 2021**

We are growing our team and activating our volunteers

Product

Lou Moore, Chief Technology Officer

Kelly McBride, Senior Product Manager

Anu Murthy, Senior Product Designer

Nicole Rappin, User Research Manager

Robert Pickett, Data Scientist

Partner onboarding and support

Annelise Grimm, Senior Program Manager

Meredith Horowski, Senior Director, Brigade Network

Tim Eccleston, Partner Support

Erick Gavin, Partner Support

Leslie Scott, GYR Volunteer manager

Engineering

Ben Golder, Senior Software Engineer

Dimitri DeFigueiredo, Principal Security Engineer

Tom Dooner, Senior Software Engineer

Molly Trombley-McCann, Senior Software Engineer

Jenny Heath, Software Engineer

Ben Vandgrift, Consultant Engineer

Jonathan Greenberg, Consultant Engineer

Client support

Liam Hanlon, Client support

Mariana Eubanks, Client support

+ dozens of GetYourRefund volunteers

I think all of the work everyone has done to build such a beautiful and user-friendly platform really allows us to help people in such a dignified way!

We absolutely love sharing such a high quality product with clients that works well, is easy to navigate, and is fun to look at.

- Colleen Smallfield, United Way Bay Area

Thank you!

Annelise Grimm, Senior Program Manager

annelise@codeforamerica.org

Kelly McBride, Senior Product Manager

Kmcbride@codeforamerica.org

Boston Tax Help Coalition

BTHC Responds to the CARES Act and Creates a
Stimulus Hotline



Mayor Martin J. Walsh's Office of

**FINANCIAL
EMPOWERMENT**

Office of Financial Empowerment Boston Tax Help Coalition CARES Act, EIP Payments-Strategy and Outcomes

The Boston Tax Help Coalition is part of Boston Mayor Martin J. Walsh's Office of Financial Empowerment. The Coalition has provided free financial capability strategies and services for low and moderate-income people since 2001. The core service provided is free tax preparation with credit building integrated into the service. Financial inclusion for immigrants and people with disabilities is prioritized by the Coalition. The mission is as follows: *The mission of the Boston Tax Help Coalition is to broaden pathways from poverty to financial empowerment by maximizing the impact of the Earned Income Tax Credit and other tax credits through quality, free tax preparation, financial education and economic stability opportunities."*

Tax preparation results and demographics

13,000 taxpayers served in Boston annually

Since 2001, over 300,000 free tax returns completed in the community

Generated more than \$270 million in returns and credits, directly into taxpayers pockets

Multicultural and multilingual taxpayers served

Approximately 15% of all taxpayers served have a self identified disability



Mayor Martin J. Walsh's Office of

**FINANCIAL
EMPOWERMENT**

Office of Financial Empowerment Boston Tax Help Coalition CARES Act, EIP Payments-Strategy and Outcomes

The Boston Tax Help Coalition watched with the nation as Congress passed the CARES Act and it was signed into law. It was clear from the beginning that IRS/Treasury's delivery of the message and proper information about the payments was muddled at best. At first we created an info page on our website, and then determined that we needed to do more. We developed an Economic Stimulus Hotline to respond to the demand for help that we saw. Demand expanded and volunteers continue to receive and call back those with concerns and questions. We anticipate we will keep the hotline up over at least the summer and into the fall.

EIP Stimulus Hotline Results

Total calls received as of June 22, 2020.....	16,873
Voice mails left.....	6,136
Volunteers and staff responding to Hotline.....	46
Not received stimulus payment.....	1,334
Stimulus payment went to wrong account.....	156
Need address change.....	65
Never received \$500 for dependents.....	254
Needed help to apply through portal as non-filer....	263



Mayor Martin J. Walsh's Office of

**FINANCIAL
EMPOWERMENT**

Boston Tax Help Coalition

Mimi Turchinetz, Coalition Director

Mimi.Turchinetz@boston.gov



Mayor Martin J. Walsh's Office of

**FINANCIAL
EMPOWERMENT**



Angel Resource Connection

*Stimulus Check: Outreach for the
Unsheltered*

Agenda

- Who is Angel Resource Connection (ARC)
- Problem
- Challenge
- Solution
- Result
- Contact Me



Who is ARC?

- Angel Resource Connection is a 501(c)3 provides food, clothing and housing assistance to the unsheltered.
- One of the first non-profits to help the homeless with C19 stimulus checks.
- Serves Seattle and Snohomish.



Problem

- ARC saw a problem
- We help the homeless sign up for the stimulus checks on the street
- Media coverage
- Public Defenders lawyers help with EIP
- Calls and emails from from across the country



Challenge

- The homeless face challenges in signing up for the EIP
- They don't know that they qualify to get it
- Most don't have an email account
- Most don't have a mailing address
- Libraries are closed - no access to the internet
- Keeping safe in the face of COVID19



Solution

- Need a designated person to create social distancing
- Provide people masks when helping them sign up
- Secure mailing address for the unsheltered
- Takes 25 minutes a person, and up to 40 minutes if an email is needed





Result

- Rewards of helping the unsheltered one-on-one
- Personal interactions brings humanity to the table
- The homeless usually express a lot of gratitude
- This income could change their lives
- Your organization can help too!





Contact Me

Penelope Protheroe, CEO
Angel Resource Connection, 501(c)3
penelope@angelresourceconnection.org
(425) 496.7711



Questions?