



# TAX CREDIT OUTREACH KIT



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GET IT  
**BACK**

Tax Credits  
for People  
Who Work

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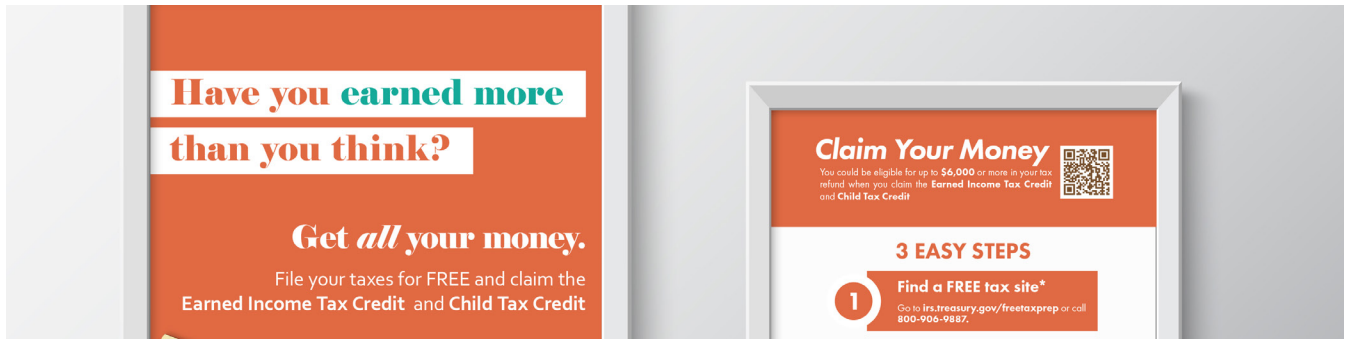
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Produced by the **Get It Back Campaign**, a project of the  
Center on Budget and Policy Priorities

# GET IT BACK WEB RESOURCES

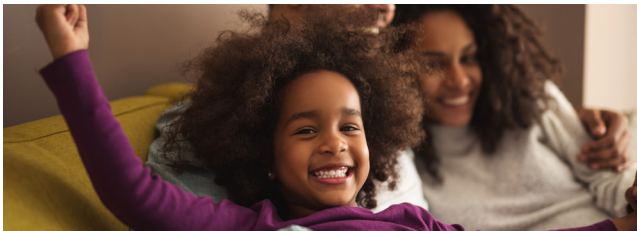
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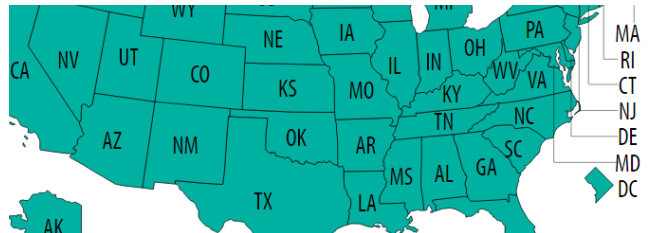
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# Refund Delays for Some EITC and CTC Recipients Continue in 2021

Under legislation in the PATH ACT, passed by Congress in December 2015, the IRS will delay release of tax refunds that include the EITC or the refundable part of the CTC (the ACTC) until February 15, 2021. This will enable the IRS to verify income reported on those returns to help prevent identity theft and erroneous refunds. What you need to know:

- The delay applies to the entire tax refund of all filers claiming EITC or ACTC. Their refunds will not be released prior to February 15, 2021. If IRS identifies significant mismatches between the income information provided on the return and the information provided by employers to IRS, there can be additional delay as IRS seeks to resolve the mismatch.
- The IRS warns that refunds released on February 15 may not reach taxpayers until at least two weeks later, due to holidays and bank processing of direct deposits.
- Filers who do not claim the EITC or ACTC are not affected. Their refunds based on over withholding or other tax credits will not be held.
- 2021 is the fifth year of the delayed release of tax refunds. This is designed to be a permanent change.
- Taxpayers who file tax returns after February 15, 2021 will not experience an additional delay in receipt of their tax refund.
- Tax filers should file tax returns as they normally do. There isn't anything early filers can do to receive their refund before February 15, 2021. Places that advertise EITC/ACTC tax refund delivery before February 15 are offering loans which may include additional fees.





# WELCOME

You don't have to be a tax expert to help working families learn about and claim the Earned Income Tax Credit (EITC) and the Child Tax Credit (CTC)!

The EITC and CTC provide critical work supports for employees earning low to moderate wages. Claiming these tax credits can put eligible workers on the path to securing better housing, obtaining dependable transportation, paying for quality child care, or pursuing higher education.

The IRS estimates that one in five eligible workers do not claim the EITC, missing out on millions of dollars they've earned. This Tax Credit Outreach Kit provides the resources community organizations and agencies need to connect workers to the tax credits and free tax help. Here you will find key elements for successful tax credit outreach, details on the tax credits and free tax filing assistance, and tips on conducting outreach and promoting the tax credits.

Visit [www.eitcoutreach.org](http://www.eitcoutreach.org) for outreach materials and resources such as flyers in 24 languages, infographics, the EITC Estimator, frequently asked questions, information on additional federal credits – including the recovery rebate credit for stimulus checks – and tools to support your outreach work in a virtual environment.

If you need assistance or additional information, the **Get It Back Campaign** team at the Center on Budget and Policy Priorities is ready to help. Just contact us at 202-408-1080 or [eitcoutreach@cbpp.org](mailto:eitcoutreach@cbpp.org).



# EARNED INCOME TAX CREDIT

The EITC is a tax benefit for working people who earn lower or moderate incomes. The credit offsets taxes, supplements very low wages, and encourages work.

The EITC can help cover any federal income tax workers may owe at tax time. Besides offsetting taxes, workers earning lower wages may also get cash back through the EITC refund. Eligible workers who claim the EITC on their tax return can receive a refund even if they do not owe income tax.

## WHO QUALIFIES FOR IT?

Single and married people who worked full- or part-time at some point during 2020 can qualify for the EITC, if their income is below the following limits:

Number of Qualifying Children	Single	Married	EITC Up to:
None	\$15,820	\$21,710	\$538
1	\$41,756	\$47,646	\$3,584
2	\$47,440	\$53,330	\$5,920
3 or more	\$50,954	\$56,844	\$6,660



Workers with investment income greater than \$3,650 in 2020 cannot claim the EITC. For more information, see [EITC and CTC Eligibility Chart](#) (page 11).

Workers, spouse, and children claimed for the EITC must have a valid social security number.

## WHO IS A QUALIFYING CHILD?

- Son, daughter, grandchild, stepchild, or adopted child
- Younger sibling, step-sibling, half-sibling, or their descendent
- Foster child placed with the worker by an authorized agency
- Must live with the worker in the U.S. for more than half the year
- Under 19, under 24 if a full-time student, or any age if totally and permanently disabled for the EITC; must be under 17 for the CTC

## HOW DO YOU CLAIM IT?

Workers must file a federal income tax return. Workers with children must also submit the Schedule EIC.

Workers who are married filing separately cannot claim the EITC.

Claiming the EITC does not affect eligibility for other benefits like SNAP (food stamps), SSI, Medicaid, cash assistance, or public housing. A saved tax refund does not count against federally-funded benefit program resource/asset limits for 12 months after the refund is received.



## HOW MUCH IS IT WORTH?

2020 Income	Workers raising:							
	No Children		1 Child		2 Children		3 Or More Children	
	Not Married	Married	Not Married	Married	Not Married	Married	Not Married	Married
\$1,000	\$78	\$78	\$349	\$349	\$410	\$410	\$461	\$461
\$5,000	\$384	\$384	\$1,709	\$1,709	\$2,010	\$2,010	\$2,261	\$2,261
\$10,000	\$443	\$538	\$3,409	\$3,409	\$4,010	\$4,010	\$4,511	\$4,511
\$15,000	\$61	\$511	\$3,584	\$3,584	\$5,920	\$5,920	\$6,660	\$6,660
\$20,000	0	\$129	\$3,473	\$3,584	\$5,774	\$5,920	\$6,514	\$6,660
\$25,000	0	0	\$2,674	\$3,584	\$4,721	\$5,920	\$5,461	\$6,660
\$30,000	0	0	\$1,815	\$2,816	\$3,668	\$4,908	\$4,408	\$5,648
\$35,000	0	0	\$1,076	\$2,017	\$2,615	\$3,855	\$3,355	\$4,595
\$40,000	0	0	\$277	\$1,218	\$1,562	\$2,802	\$2,302	\$3,542
\$45,000	0	0	0	\$419	\$509	\$1,749	\$1,249	\$2,489
\$50,000	0	0	0	0	0	\$696	\$196	\$1,436

This is not a tax table. This chart presents sample EITC benefits for different incomes. Do not use this table to complete income tax returns.



# CHILD TAX CREDIT

The Child Tax Credit (CTC) is a federal tax credit worth up to \$2,000 for each qualifying child (see [page 6](#)) under age 17 claimed on a worker's tax return. The CTC has two components. First, the non-refundable CTC reduces any income tax owed. If any of the CTC remains after the income tax has been eliminated, the refundable "Additional CTC" delivers a tax refund to some workers, even if they owe no income tax.

**New:** A \$500 non-refundable credit is available for families with qualifying non-child dependents. This includes children over 17 and children with an Individual Taxpayer Identification Number who otherwise qualify for the CTC. Additionally, qualifying relatives who are considered a dependent for tax purposes (like dependent parents), can be claimed for this credit.

## WHO QUALIFIES, AND HOW DO YOU CLAIM IT?

Single and married people who worked full- or part-time at some point during the tax year can qualify for the CTC if they earned more than \$2,500. A worker and spouse must have a valid social security number or an Individual Taxpayer Identification Number. Qualifying children claimed for the CTC must have a valid social security number.

Claiming the CTC does not affect eligibility for other benefits like SNAP (food stamps), SSI, Medicaid, cash assistance, or public housing. A saved tax refund does not count against federally-funded benefit program resource/asset limits for 12 months after the refund is received. For more information, see the [EITC and CTC Eligibility Chart](#) (page 11).

To claim the CTC, a worker must file a federal income tax return. Workers may get any remaining CTC as an additional CTC refund by filing Schedule 8812, "Additional Child Tax Credit" with their tax return.

A child may not be claimed for the CTC if the child provides over one-half of his or her own support.





2020 Income	Number of Qualifying Children Under Age 17			
	1 Child	2 Children	3 Children	4 Children
\$5,000	\$375	\$375	\$375	\$375
\$10,000	\$1,125	\$1,125	\$1,125	\$1,125
\$14,000	\$1,400	\$1,725	\$1,725	\$1,725
\$18,000	\$1,400	\$2,325	\$2,325	\$2,325
\$20,000	\$1,400	\$2,625	\$2,625	\$2,625
\$25,000	\$1,365	\$2,800	\$3,375	\$3,375
\$30,000	\$865	\$2,800	\$4,125	\$4,125
\$35,000	\$320	\$2,320	\$4,200	\$4,875
\$40,000	0	\$1,720	\$3,720	\$5,600
\$45,000	0	\$1,120	\$3,120	\$5,120
\$50,000	0	\$520	\$2,520	\$4,520

This chart is not a tax table. The amounts shown are sample values for the “Additional” Child Tax Credit refund that single workers will receive after all their income tax, if any, is eliminated by the basic Child Tax Credit. *Note: married workers and families with larger incomes or more children than shown here may also receive refunds.*



# EITC AND CTC ELIGIBILITY

## WHAT IS EARNED INCOME?

### EARNED INCOME INCLUDES:

#### Taxable Earned Income:

- Wages, salaries, and tips
- Union strike benefits
- Long-term disability benefits received prior to minimum retirement age
- Net earnings from self-employment
- Gross income received as a statutory employee
- Investment income (i.e. taxable interest, tax-exempt interest, and capital gain distributions) - If this income is more than \$3,650, the EITC cannot be claimed

**Exception:** Military combat pay is not taxable earned income, up to the highest pay level for enlisted personnel. Military personnel may choose to count their non-taxable combat pay in determining eligibility for the EITC, if it is advantageous to do so. Combat pay must be counted for the CTC.

### EARNED INCOME DOES NOT INCLUDE:

- Interest and dividends
- Social security and railroad retirement benefits
- Welfare benefits
- Workfare payments
- Pensions or annuities
- Veterans' benefits (including VA rehabilitation payments)
- Workers' compensation benefits
- Alimony and Child Support
- Non-taxable foster care payments
- Unemployment compensation (insurance)
- Earnings for work performed while an inmate at a penal institution
- Taxable scholarship or fellowship grants that are not reported on Form W-2

#### Nontaxable earned income:

- Salary deferrals (i.e. under a 401(k) plan)
- Military basic housing and subsistence allowances
- Meals or lodging for the convenience of a taxpayer's employer
- Housing allowance or rental value of a parsonage for the clergy
- Excludable dependent care benefits
- Salary reductions (i.e. under a cafeteria plan)
- Anything else of value you get from an employer for services you performed even if it is not taxable





## EITC AND CTC ELIGIBILITY CHART

EITC				CTC	
Income Limits					
Children	Single	Married	EITC up to:	<ul style="list-style-type: none"><li>• Must earn more than \$2,500</li><li>• Credit up to \$2,000 per child</li><li>• Investment income — no limit</li></ul>	
3 or more	\$50,954	\$56,844	\$6,660		
2	\$47,440	\$53,330	\$5,920		
1	\$41,756	\$47,646	\$3,584		
0	\$15,820	\$21,710	\$538		
Investment income — \$3,650					
Sources of income					
Wages, salary, tips, employer-based disability, self-employment earnings, military combat pay, union strike benefits					
Taxpayer ID Number					
Valid social security number (SSN) that permits work in the U.S. for tax filer, spouse, and children			Valid social security number (SSN) or Individual Taxpayer Identification Number (ITIN) for tax filer and spouse; children must have an SSN		
Filing Status					
Cannot be married filing separately			Any		
Age Requirement					
Must be between 25 and 64 years of age (workers without children)			Any		
Child Qualifications (workers with children)					
Relationship					
<ul style="list-style-type: none"><li>• Son, daughter, grandchild, stepchild or adopted child</li><li>• Younger sibling, step-sibling, half-sibling, or their descendent</li><li>• Foster child placed with the worker by a government agency</li></ul>					
Residency					
Must live with the worker in the U.S. for more than half the year			Must live with the worker in the U.S. for more than half the year. Exception: A non-custodial parent who is permitted by a divorce or separation agreement to claim the child as a dependent.		
Age of Child (on December 31 of the tax year)					
Under 19, under 24 if a full-time student, or any age if totally and permanently disabled			Under 17		
Dependency					
Not required (except for a claim by a married parent who separated from his or her spouse during the first half of the year)			Children claimed must be considered a dependent for tax filing purposes		
Tax Forms					
<ul style="list-style-type: none"><li>• Form 1040</li><li>• Schedule EIC (workers with children)</li></ul>			<ul style="list-style-type: none"><li>• Form 1040</li><li>• Schedule 8812 "Additional Child Tax Credit"</li></ul>		

# FREE TAX FILING AND VITA

Volunteer Income Tax Assistance (VITA) is a free alternative to paid tax preparation. The IRS sponsors the VITA program which community-based organizations coordinate locally. VITA volunteers are trained according to IRS guidelines to fill out basic tax forms, including the ones needed to claim the EITC and the CTC. Volunteers must pass an annual exam to prepare tax returns. All tax returns undergo a quality review before VITA sites submit them to the IRS.

## WHY IS IT IMPORTANT?

IRS data indicate about 57 percent of EITC recipients pay someone to prepare their tax returns. Paid tax preparation fees average about \$300. Lower-wage workers are giving up a substantial portion of the tax benefits they have earned. They need every penny of their tax refunds and may not realize that they do not have to pay fees that drain money away from their refunds.

### **Refund Anticipation Loans and Checks:**

Tax preparers may persuade tax filers to get a “refund anticipation loan” or “refund anticipation check” to get their refund quicker. These options are additional fees and do not expedite refund delivery.



## HOW CAN YOU PROMOTE VITA?

### 1. Publicize the locations of VITA sites.

Your IRS Territory Manager can provide a list, or use the IRS VITA site zip code locator (<https://irs.treasury.gov/freetaxprep>).

**2. Set up a hotline.** A telephone hotline can refer callers to the nearest VITA site. Some communities have a "2-1-1" hotline which connects callers to social services.

**3. Enlist volunteers to staff VITA sites.** Volunteers do not need to have a tax background, although retired business professionals, accountants, and accounting students are well-suited to the job.

**4. Help VITA sites obtain updated electronic filing systems.** Filing a tax return electronically allows it to be processed quicker, delivering refunds to people faster. Local businesses that are upgrading their computers may be willing to donate their older models.

**5. Make sure VITA sites can accommodate special needs of tax filers.** Provide interpreters for tax filers who speak languages other than English and help make sites accessible for people with disabilities.



## WHAT ARE OTHER FREE TAX FILING OPTIONS?

### AARP Tax-Aide

The Tax Counseling for the Elderly (TCE) program is sponsored by the IRS, often in conjunction with the AARP Tax-Aide Program. Although its main purpose is to assist seniors, TCE also can help lower-income workers of all ages file tax returns. To identify site locations, visit [www.aarp.org/money/taxes/aarp\\_taxaide](http://www.aarp.org/money/taxes/aarp_taxaide).

### [MyFreeTaxes.com](http://MyFreeTaxes.com)

Allows people to file both federal and state tax returns for free. The website uses H&R Block software and provides free guidance through email or online chat. There is no income limit to use this program, however you cannot use it if you have self-employment income.

# PREMIUM TAX CREDIT

The Premium Tax Credit (PTC) helps make health coverage more affordable for individuals and families. The credit is available for insurance purchased in a federal or state “Health Insurance Marketplace.” It is delivered as an advance payment directly to the insurance company or as a lump sum on a tax return.

## BACKGROUND

The 2010 Patient Protection and Affordable Care Act (ACA) expanded access to health insurance and included a mandate for most people to have coverage. Starting in 2019 (which you file taxes for in 2020), people without health insurance no longer face a penalty.

In addition to the PTC, the law increases health insurance options by expanding Medicaid eligibility in most states.

## IMPORTANT NOTE

- Health plans must be purchased during open enrollment. A special enrollment period may be available to people experiencing a life change such as marriage, birth, or permanent relocation.
- Taxpayers are required to report changes in income to the Marketplace to avoid Advance PTC overpayments.

## WHO QUALIFIES FOR IT?

To claim the PTC, a person must:

1. Be enrolled in a Marketplace health insurance plan
2. Have income between 100 and 400 percent of the federal poverty line
3. Have an eligible tax filing and dependent status (cannot be a dependent or married filing separately)
4. Be ineligible for Medicare, Medicaid, or other public coverage, or employer-sponsored coverage

Lawfully present immigrants who have incomes below 100 percent of the poverty line but cannot qualify for Medicaid (usually because they have lived in the United States for less than five years) can also claim the credit.

The credit amount is based on household income and family size. The consumer contribution is limited to 2.07 to 9.83 percent of family income for 2020.

## HOW DO YOU CLAIM IT?

File a federal tax return and Form 8962, Premium Tax Credit.

Everyone who purchases health insurance in the Marketplace will receive Form 1095-A, Health Insurance Marketplace Statement. This form provides the information needed to determine the PTC on Form 8962.

- **Advance payments:** Since advance payments are based on estimated household income for the year, actual income must be reconciled on the tax return. Filers who received excess advance payments will owe the IRS. The repayment amount is capped and based on income.

If the Marketplace determines people eligible for the PTC based on their estimated income and their actual income is below 100 percent FPL, they do not have to repay the Advance PTC.

- **Lump sum payment:** Taxpayers will receive the PTC after filing Form 8962.



## LEARN MORE

**Health Reform: Beyond the Basics** provides training and resources that explain eligibility and enrollment for health coverage under the Affordable Care Act and specific tools for volunteer tax preparers. Visit [www.healthreformbeyondthebasics.org](http://www.healthreformbeyondthebasics.org).



# GETTING STARTED WITH TAX CREDIT OUTREACH

There is a spectrum of activities that starts with simple ways of conveying the message about the tax credits and moves toward more intensive efforts that weave outreach into the ongoing work of organizations and institutions that interact with eligible workers. While connecting an organization's clients to the tax credits is important, the impact is magnified when groups coordinate outreach efforts in partnerships or coalitions. Involvement may fluctuate over time. The most important thing is that all partners see that they play a vital role in promoting the tax credits and free tax help to clients and to the community.

Here are six key elements for tax credit outreach activities to reach your clients and your community.

## 1

### SPREAD THE WORD

Getting tax credit information into the hands of eligible workers is fundamental. Materials should let workers know about the EITC and the CTC and how to get free tax help. Check out the Get It Back Campaign's outreach materials at [www.eitcoutreach.org/outreach-strategies/materials](http://www.eitcoutreach.org/outreach-strategies/materials).

**Clients:** Distribute flyers, hang posters, and mail envelope stuffers.

**Community:** Place materials in locations that eligible workers may frequent such as employee break rooms, store windows, public transportation, and locations where people apply for public benefits. Include information in newsletters and utility bills.





# 2

## PARTNER UP

Partners bring valuable networks, contacts, skills, and resources (staff, time, and funding) to outreach efforts.

Outreach partners may include:

- Community & human services groups
- Utility companies
- Labor unions
- Employers and local businesses
- Public benefit programs
- Schools
- Civic and service organizations
- Food banks & shelters
- United Ways
- State & local governments
- Financial institutions
- Goodwill Industries
- Child care & foster care agencies
- Legal assistance programs
- Faith-based groups

**Clients:** Reach out to groups your organization partners with to deliver programming and to places your clients go to for other services. Organizational partners can help reinforce the tax credit message to your clients and inform their own.

**Community:** Partners can help recruit VITA volunteers, donate printing of materials, assist with publicity, or other costs, and inform their networks. For example, churches can reach out to their congregations and schools can communicate with families and staff.

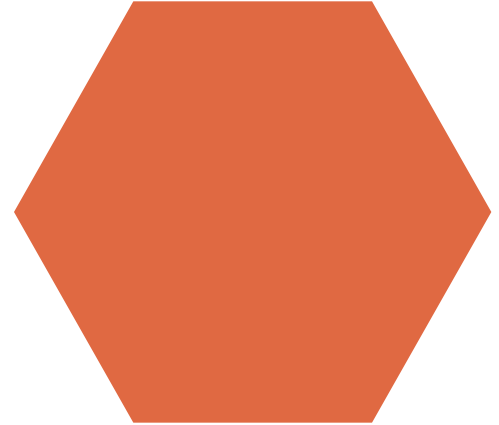


### 3 CONNECT WORKERS TO FREE TAX HELP

Linking workers to free tax filing assistance is an important part of any tax credit outreach effort. Go to places where eligible people may gather — such as tenant meetings in housing developments, PTA meetings, community sporting events, civic or cultural events, community health or job fairs, or other activities — to distribute information about free tax help.

**Clients:** In addition to referring clients to free tax sites, consider creating free tax filing opportunities onsite by partnering with a mobile VITA site or helping people file their own taxes.

**Community:** Organize free tax filing opportunities at community events, publicizing them in advance so tax filers know what documents to bring with them. Your IRS Territory Manager ([www.eitcoutreach.org/learn/tax-filing/irs-territory-managers/](http://www.eitcoutreach.org/learn/tax-filing/irs-territory-managers/)) can help identify trained volunteers to help prepare tax returns. Retired or volunteer accountants, the Society of Certified Public Accountants, or students also may be able to assist.





# 4

## EXPAND FREE TAX SITES

Few communities have enough VITA sites or sites that are in locations that are convenient for most eligible workers. Organizations can help increase free tax filing options even if they cannot commit to the entire tax season. Host a tax filing day, provide service during February when VITA sites tend to be the busiest, allow staff to volunteer at another site, serve as an intake site for Virtual VITA, or participate in a special event.

**Clients:** Inform clients about special tax filing events, coordinate transportation to a free tax filing site, or offer tax help onsite outside of regular business hours.

**Community:** Work with your IRS Territory Manager to establish new sites. Community action agencies, schools, recreation centers, libraries, housing developments, public assistance offices, or other places that have connections with eligible workers are ideal locations. To improve existing sites, enlist local businesses to donate computers, recruit bilingual volunteers or provide interpreters, make VITA sites accessible to people with disabilities, or offer child care.







## 5 GET MEDIA COVERAGE

Media coverage can help carry your message to tax filers, outreach partners, and volunteers. Whether in print, on television, over the radio, or via social media, focus on the main message. The tax credit story is about hard-working people raising families trying to achieve financial security.

**Clients:** Profile your organization's work in the media to create positive press. This exposure can help expand your client base.

**Community:** Remember to contact smaller media outlets such as community newspapers, non-English language media, and community and college radio and television stations. Get your message out in public spaces such as bill boards, Shopper's guides and circulars that advertise store sales, and mass transportation including bus shelters, buses, and trains.

View more tips on working with the media at [www.eitcoutreach.org/outreach-strategies/media](http://www.eitcoutreach.org/outreach-strategies/media).





## 6

### SUSTAIN OUTREACH EFFORTS

Expand the reach and quality of tax credit outreach efforts by making outreach activities an integral part of how organizations operate. Identify funding and other resources that can provide stability to your outreach efforts.

**Clients:** Integrate outreach into your organization by including tax credit outreach in job responsibilities, incorporating information into employee training, or planning annual pre- and post-tax season meetings.

**Community:** Help partners institutionalize tax credit outreach activities. For example, businesses may start by displaying tax credit posters on the lunchroom bulletin board, and can institutionalize outreach by including tax credit information in the orientation for new employees. A college can institutionalize tax credit outreach by sponsoring its own VITA site and initiating a system for informing its employees and students about the credits and where to get free tax filing help on campus through emails or notices with paychecks.

# USING SOCIAL MEDIA

Social media is a great tool to reach potential tax credit and VITA clients, as well as volunteers, and outreach campaign supporters. Here are some tips on how to build a following, and keep followers interested and engaged on Facebook and Twitter. To learn more about tax credit outreach and social media see: [www.eitcoutreach.org/outreach-strategies/using-social-media](http://www.eitcoutreach.org/outreach-strategies/using-social-media).

## STRATEGIES

**1. Post consistently.** Aim to post on Facebook 3-5 times a week (or up to 2 posts a day) and on Twitter 2-4 times a day. Generally, engagement decreases if you post too often. You can schedule posts on Facebook ahead of time or use a tool like Buffer or HootSuite for Twitter.

Create a calendar to help you plan posts ahead of time and stay on top of important dates.

**2. Share frequently.** Eighty percent of posts should be shared from other sources and 20 percent of your posts should be original content. Find short articles on the tax credits, savings, and building assets. Look out for trending topics and see how you can adapt them to your own work. Many of the **Get It Back Campaign** blog posts are directed at people who can benefit from tax credits. Repost to share them with your clients and your network!



## CONNECT WITH US!

Like our Facebook page for great graphics, blogs, and posts to share with your followers.



[www.facebook.com/getitbackcampaign](http://www.facebook.com/getitbackcampaign)



**3. Create great content** Not sure what your 20 percent of original content should include? Here are some ideas:

- Weekly or monthly stats on how many VITA clients your organization has served
- “Top Ten” lists
- Stories from people who have benefitted from working family tax credits
- Volunteer spotlights and thank yous
- Calls to action, be it for volunteers, donations, or space

**4. Make it visual.** Good images grab attention and trigger emotional responses that text can’t. Take the time to create beautiful graphics using a simple and free tool like Canva. Images can feature inspirational quotes related to your work, tax credit statistics (with a link to your website), or testimonials.

If you don’t have time to create your own images, that’s okay! The [Get It Back Campaign](#) website, blog, and Facebook page all feature images that you can share. Also remember to share pictures from your events.

**5. Be responsive.** Social media isn’t just a one-way broadcast of your news, articles, and events. Make sure that you’re starting two-way conversations and posting content that your followers care about. Engage by responding to comments and questions, and starting conversations through questions. Not only will your followers appreciate being heard, they will engage more with your content.

**6. Show that you aren’t a robot.** Social media is a less formal platform than traditional media and you should take advantage of that. Use conversational language and share a glimpse into the life of staff members from time to time. Don’t be afraid to be yourself! You want your followers to remember that there’s a person behind the account.





# PROMOTING TAX CREDITS AND FREE TAX HELP

Community-based outreach activities are critical to help eligible workers learn about and claim the EITC and the CTC. Your efforts are especially important for workers who earn too little to be required to file a tax return, enter the labor force for the first time, earn less than expected during the year, mistakenly think they don't qualify for the credits, or don't know they can file their taxes for free and claim the EITC and CTC for up to three previous years.

Explore the following outreach strategies for institutions and communities to help workers get back the money they've earned.

Find additional outreach strategies at [www.eitcoutreach.org/outreach-strategies](http://www.eitcoutreach.org/outreach-strategies) to reach:

- [Foster Parents & Grandparents](#)
- [Workers who are Homeless](#)
- [Individuals Released From Prison](#)
- [Money Management Services](#)
- [Faith-based Organizations](#)



# PUBLIC BENEFIT AGENCIES

Many state and local government agencies that administer public benefits such as Medicaid, the Children's Health Insurance Program (CHIP), SNAP (formerly called food stamps), LIHEAP, WIC, or subsidized child care, have ongoing contact with families and individuals who work and also receive public benefits. Enlisting such agencies in tax credit outreach is an effective way to reach large numbers of eligible workers on a regular basis.

## STRATEGIES

### 1. Assure families there's no downside to these tax credits.

EITC and CTC refunds aren't counted as income for 12 months after receipt when determining eligibility for public benefits. Train eligibility workers to inform families that they can claim the tax credits and still qualify for benefits such as SNAP, Medicaid, and subsidized housing.

### 2. Reach out to newly eligible

**taxpayers.** Workers who have experienced a drop in hours or wages may have earned too much to qualify for the credits in the past but now are eligible. Connect with these workers through unemployment offices, job training programs, or government assistance programs. Also reach out to people transitioning into the workforce.

### 3. Include tax credit information in electronic benefit screening programs.

People who qualify for benefit programs may also qualify for the EITC and the CTC. Work with screening program designers to incorporate information about tax credits and free tax filing assistance. Online benefit screening programs include Benefit Finder ([www.benefits.gov/benefits/benefit-finder](http://www.benefits.gov/benefits/benefit-finder)) and EarnBenefits Online ([www.earnbenefits.org/](http://www.earnbenefits.org/), available in five states).





**4. Partner with your local Workforce Investment Board.** Boards are required to secure contracts to provide job readiness, job placement, and post-employment services to TANF recipients entering the labor force. Encourage local boards to require companies receiving employment services contracts to provide workers with tax credit information.

**5. Share tax credit information in mailings.** State or county program administrators can include flyers and envelope stuffers in benefit checks, WIC coupons, program renewal notices, waiting list information, rent notices in public housing, or other mailings.

## CONNECT WITH

- State or county program administrators
- Outreach workers who promote multiple benefit programs
- Caseworkers
- Workforce Investment Board Directory ([www.servicelocator.org/workforcecontacts.asp](http://www.servicelocator.org/workforcecontacts.asp))



# BUSINESSES AND EMPLOYERS

Partnering with local businesses that cater to lower- and moderate-income consumers can reach customers, as well as employees. Government agencies and nonprofit groups are employers too. These workers often earn modest wages and could qualify for the EITC and CTC.

## STRATEGIES

### **1. Show businesses that promoting tax credits helps stabilize the workforce and develop communities.**

When employees have the money they need to take care of their families, they are more productive at work. The EITC and CTC are an economic development tool that puts more money into the pockets of community residents, who then put more money back into local businesses.

### **2. Work with employers and managers to promote tax credits and free tax filing assistance to employees.**

Employers can promote tax credits directly to employees by including tax credit information with paychecks, hanging posters in the workplace, and making information available through employee resource lines and intranet systems. Managers can incorporate information into employee manuals and training for new hires. Employers with many lower-wage employees can arrange to have VITA volunteers provide onsite tax preparation.

### **3. Help businesses share tax credit information with customers.**

Businesses can display informational posters in their windows, department stores can play announcements on public address systems, and family restaurants can print messages on tray liners or placemats.

### **4. Reach out to self-employed workers.**

Some workers don't realize they are self-employed and are unfamiliar with tax responsibilities, such as paying estimated self-employment taxes. Workers like Uber and Lyft drivers, may not understand how to count income or track business expenses. Inform self-employed workers about educational tax resources. Direct rideshare drivers and free tax preparation volunteers to [www.RideshareTaxHelp.com](http://www.RideshareTaxHelp.com) to learn about tax filing, record keeping, and making tax payments.





## CONNECT WITH

- Merchants' associations
- Trade groups
- Utility companies, department stores, family restaurants, and other local businesses
- Businesses and organizations that cater to lower- and moderate-income consumers
- Local Chamber of Commerce ([www.chamberofcommerce.com/chambers](http://www.chamberofcommerce.com/chambers))

# UTILITY COMPANIES

Some lower-income households are struggling to meet electricity, natural gas, and heating oil prices, as well as the high cost of gasoline. The EITC and CTC can help families stay current with utilities, especially those in danger of having services disconnected. Utility companies have experience helping customers avoid service shut-offs and can communicate with lower-income households the advantages the tax credits provide. They also have direct contact with businesses in the community — their corporate customers — and can encourage them to join tax credit outreach activities.

## STRATEGIES

### **1. Combine tax credit outreach with existing customer communications.**

Utility companies can include tax credit information in customer newsletters, mailings, recorded “hold” messages, or company sponsored consumer affairs broadcasts. Utility companies can insert a “bill stuffer” that has tax credit information with customers’ monthly bills. Customer service employees can also promote the EITC, the CTC, and free tax filing assistance to customers during phone inquiries and walk-in visits.

**2. Reach out to employees.** Some employees of utility companies may qualify for the tax credits themselves. Companies can display informational posters in the workplace or include flyers with paychecks.

**3. Focus on populations that are likely to qualify.** Utility companies can reach out to customers who have fallen behind on their bill payments in the past or who receive energy assistance through programs like Low Income Heating and Energy Assistance Program ([www.acf.hhs.gov/programs/ocs/liheap-state-and-territory-contact-listing](http://www.acf.hhs.gov/programs/ocs/liheap-state-and-territory-contact-listing)). Companies can inform customers that the EITC and the CTC will not affect their LIHEAP benefits.

### **4. Support local tax credit outreach campaigns.**

Utility companies can offer direct or in-kind support such as printing, laptop loans or donations, or office space to host a VITA site.



## CONNECT WITH

- Find a “champion” within a utility company such as an executive in charge of consumer affairs or customer service





# SCHOOLS

Working with schools offers many opportunities to reach families that may qualify for the EITC and the CTC. Schools are usually viewed as trustworthy institutions and families pay attention to information children bring home from school. Engaging colleges and universities can help expand the availability of free tax filing assistance.

## STRATEGIES

**1. Help schools host free tax filing assistance sites.** Schools have the ideal space and resources — such as computers and desks — to serve as Volunteer Income Tax Assistance sites. High schools, community colleges, and universities can help provide this much-needed service in underserved communities.

**2. Identify families that are likely to qualify.** Focus on schools with many students eligible for free or reduced-price meals, or Title I schools that serve elementary school students in lower-income communities. Your state Department of Education can identify school districts with these programs ([www2.ed.gov/about/contacts/state/index.html](http://www2.ed.gov/about/contacts/state/index.html)). Also reach out to Head Start programs ([eclkc.ohs.acf.hhs.gov/hslc/hslc\\_grantee\\_directory](http://eclkc.ohs.acf.hhs.gov/hslc/hslc_grantee_directory)).

**3. Enlist school staff to help conduct outreach.** School superintendents and principals can distribute tax credit information with materials like school newsletters, report cards, and lunch menus. School counselors often come into contact with families experiencing financial hardship and are well-positioned to promote the credits.



**4. Reach out to students in the workforce.** Administrators can provide tax credit information to General Education diploma (GED) classes. Community colleges or technical schools can conduct outreach to students who may be working part-time, training to change jobs, or preparing to enter the workforce. Other students taking non-credit courses, such as personal finance, may also be eligible.



**5. Involve students in conducting outreach activities.** High schools and colleges can incorporate community service activities into their curriculum. Students can help publicize the EITC and the CTC in their communities and volunteer at VITA sites. Student service groups can organize tax credit outreach projects.



**6. Coordinate tax credit outreach with financial aid promotion.** High schools can incorporate FAFSA (Free Application for Federal Student Aid) promotion or help into VITA sites. Community colleges and universities can include information on the American Opportunity Tax Credit while promoting the EITC, the CTC, and VITA.

## CONNECT WITH

- Local school districts
- School officials and administrators
- School counselors
- State Department of Education
- Community colleges and technical schools
- High schools
- Head Start Programs
- Parent Teacher Associations ([member.pta.org/Get-Involved/PTA-Local-Unit-Lookup](https://member.pta.org/Get-Involved/PTA-Local-Unit-Lookup))

# FINANCIAL INSTITUTIONS

Under the Community Reinvestment Act (CRA), financial institutions — including banks and credit unions — are evaluated on their efforts to help underserved neighborhoods access credit and other financial services. Financial institutions can be enthusiastic outreach partners and have helped tax filers open bank accounts and direct deposit their refunds.

## STRATEGIES

**1. Offer affordable bank accounts at free tax preparation sites.** Work with banks to decide on favorable terms for VITA clients. For example, banks and credit unions can waive or reduce monthly fees, minimum balances, and penalties. The Woodstock Institute provides a guide for organizations partnering with credit unions ([www.woodstockinst.org/research/building-community-assets-guide-credit-union-partnerships](http://www.woodstockinst.org/research/building-community-assets-guide-credit-union-partnerships)).

**2. Coordinate free check-cashing for people who do not have bank accounts.** Partner with banks and credit unions to issue vouchers to tax filers at a VITA site that can be redeemed for free refund check cashing at the financial institution.

**3. Arrange for bank employees to volunteer at a free tax site on company time.** The Federal Deposit Insurance Corporation (FDIC) works with banks to organize these efforts.





## CONNECT WITH

- FDIC regional offices ([www.fdic.gov/about/contact/regional-offices](http://www.fdic.gov/about/contact/regional-offices))
- National Credit Union Association (<https://mapping.ncua.gov>)

# WORKERS AND CHILDREN WITH DISABILITIES

Lower-wage workers with disabilities and families that are raising children with disabilities face profound challenges. Finding transportation to and from a job may be costly and difficult to arrange. Out-of-pocket health care expenses may be higher than for other families. Securing child or adult day care for a family member with special needs may pose a financial burden. The EITC and CTC can provide a vital income boost to assist with these expenses.

## STRATEGIES

**1. Make sure free tax filing assistance sites are accessible.** Modify existing tax assistance sites for people with disabilities. If existing sites aren't accessible, consider a mobile tax assistance site or home visiting program as alternatives.

**2. Reach out to people with disabilities entering the workforce.** The Disability Employment Initiative improves state and local level coordination among disability employment and training programs and establishes community partnerships to better serve people with disabilities ([disability.workforcegps.org/](https://disability.workforcegps.org/)). Disability Resource Coordinators and American Job Centers can include tax credit information in discussions with people seeking employment ([www.servicelocator.org/onestopcenters.asp](http://www.servicelocator.org/onestopcenters.asp)).

**3. Inform families with a member who has disabilities about special tax credit rules.**

Workers who receive long-term, employer-paid disability benefits and are under the minimum retirement age can qualify for the EITC and CTC, even if they didn't work during the year. These benefits are considered earned income. (Social Security Disability Insurance, SSI, and military disability pensions are not earned income.) Let families know that a child of any age with a permanent and total disability can be claimed for the EITC. Workers who have a severe disability or are raising a child with a severe disability can claim the tax credits and continue to receive other public benefits.

## CONNECT WITH

- Disability advocates
- Disability Resource Coordinators
- State agencies for vocational rehabilitation, supported employment, supported living, mental health, or intellectual or developmental disabilities
- American Job Centers
- The Real Economic Impact Network



## FURTHER RESOURCES

- **Ticket to Work Service Provider Locator** ([www.chooseworkttw.net/findhelp/](http://www.chooseworkttw.net/findhelp/))
- **Directory of Centers for Independent Living and Associations**  
([www.ilru.org/projects/cil-net/cil-center-and-association-directory](http://www.ilru.org/projects/cil-net/cil-center-and-association-directory))
- **Consortium for Citizens with Disabilities Member Organizations**  
([www.c-c-d.org/rubriques.php?rub=organization.php](http://www.c-c-d.org/rubriques.php?rub=organization.php))



# DOMESTIC VIOLENCE

## SURVIVORS

The U.S. Department of Justice describes domestic violence as “a pattern of abusive behavior in any relationship that is used by one partner to gain or maintain power and control over another intimate partner.” Not only does it lead to physical and psychological harm, domestic violence is characterized by economic distress, financial dependence and employment instability.

Free tax filing assistance and refundable tax credits, such as the EITC and CTC, may be a lifeline that can help survivors to boost earning power, establish a safety net, and ultimately end financial relationships with an abusive partner.

### STRATEGIES

**1. Work with staff at domestic violence shelters.** Train shelter staff and advocates to disseminate information on free tax preparation, tax credits, and asset-building services. Refer to the National Coalition Against Domestic Violence’s State Coalition List ([www.ncadv.org/learn/state-coalitions](http://www.ncadv.org/learn/state-coalitions)) or call the National Domestic Violence Hotline ([www.thehotline.org/](http://www.thehotline.org/)) at 1-800-799-SAFE (7233). Provide flyers, brochures, and business cards onsite at domestic violence shelters with specific contact information for follow-up rather than a general organizational phone number or email address.



**2. Conduct face-to-face tax credit outreach.** Electronic only outreach efforts can miss and endanger domestic violence survivors who are more vulnerable to identity theft and cyber stalking. Instead of limiting outreach to the websites and emails, arrange to speak about the tax credits during a meeting for advocates or shelter residents. Share the safety procedures in place at free tax filing assistance sites and what clients can expect during their appointments.

**3. Provide free tax filing assistance at domestic violence shelters.** Dispatch staff to explain the tax credits and answer questions about eligibility. Explain that VITA volunteers are bound by federal confidentiality rules when helping tax filers. Help survivors manage joint tax liability with an ex-abusive partner with services such as Low Income Taxpayer Clinics ([www.eitcoutreach.org/learn/tax-filing/low-income-taxpayer-clinics/](http://www.eitcoutreach.org/learn/tax-filing/low-income-taxpayer-clinics/)) or the Taxpayer Advocate Service ([taxpayeradvocate.irs.gov/](http://taxpayeradvocate.irs.gov/)).



#### 4. Reach out to relative caregivers and foster parents of children removed from a home impacted by domestic violence.

Make sure they know about the tax credits and free tax help. Connect with them through child welfare agencies, foster parent associations ([nfpaonline.org/CoSAdirectory](https://nfpaonline.org/CoSAdirectory)), or community-based programs with services such as family counseling, crisis intervention, and support groups.

## CONNECT WITH

- National Coalition Against Domestic Violence
- Domestic violence advocates and shelters
- Child welfare agencies
- Foster parent associations
- Family counseling and crisis intervention programs and support groups
- Low Income Taxpayer Clinics



## FURTHER RESOURCES

- **The Allstate Foundation's** *Moving Ahead Through Financial Management* curriculum (<https://nnedv.org/resources-library/moving-ahead-curriculum/>)
- **Emergency Shelters Locator** ([www.domesticshelters.org/](http://www.domesticshelters.org/))

# IMMIGRANT WORKERS

Workers who are not proficient in English often earn lower incomes and may not understand that they can qualify for the EITC and the CTC. Conducting outreach only in English will miss eligible workers. It is especially important for outreach messages to emphasize that immigrants who are legally authorized to work and have Social Security numbers (SSNs) may be eligible for the EITC, and that families may qualify for the CTC even if a tax filer or spouse does not yet have an SSN. (Children claimed for the CTC must have an SSN.)

## STRATEGIES

**1. Use bilingual materials.** Our website has [flyers, posters, and envelope stuffers](#) in English and Spanish, as well as flyers in 23 additional languages.

**2. Explain tax credit information in other languages.** Dispatch bilingual staff or volunteers to explain the tax credits and answer questions at presentations to community groups or in one-to-one conversations. Immigrant workers may have trouble understanding complex tax rules or they might have been denied other public benefits such as SNAP or Medicaid in the past and might assume they do not qualify for tax benefits. Immigrants may incorrectly believe that claiming tax benefits could jeopardize their immigration status or their ability to become a citizen.

**3. Promote multi-lingual free tax help.** Immigrant workers and workers who have limited English proficiency may be especially vulnerable to ill-trained or dishonest paid preparers. When advertising VITA sites, indicate which sites provide services in languages other than English. Reach out to institutions with multi-lingual staff to host a site or provide volunteers.





**4. Distribute materials through schools and community events.** Encourage schools to provide bilingual material about the tax credits, and work with English as a Second Language (ESL) programs or migrant education coordinators. Community events, such as health fairs, educational programs, job fairs, or holiday festivals also present outreach opportunities.

**5. Work with non-English language media.** Many non-English speaking communities have their own newspapers and radio and television programs. Encourage news coverage, run ads, write articles, and develop public service spots on the tax credits.

## CONNECT WITH

- Newcomers Clubs
- Settlement houses
- Immigrant aid associations and legal services
- Organizations with bilingual and bicultural staff
- Businesses in immigrant communities such as ethnic grocery stores or restaurants, barber shops, or nail salons
- Non-English language media

## FURTHER RESOURCES

To find local groups that provide services to refugees visit:

- **Catholic Charities** ([catholiccharitiesusa.org/find-help](http://catholiccharitiesusa.org/find-help))
- **Jewish Family Services** ([www.ajfca.org/](http://www.ajfca.org/))



# RURAL COMMUNITIES

Wages in many rural communities are lower than in larger cities, making it more likely that workers may qualify for the EITC. Since services are less accessible than in urban areas – from social services and libraries to free and commercial tax preparers – information about the tax credits and places to go for tax help may be less available. Outreach efforts are needed to reach isolated communities.

## STRATEGIES

### 1. Get involved with the community.

Rural communities tend to be close-knit, so identify trusted leaders and institutions to partner with. Conduct tax credit outreach at community events. Local sports games, festivals, church events, back-to-school nights, PTA meetings, and regional conferences offer opportunities to reach many eligible workers at once.

**2. Use technology.** A volunteer-staffed van or individual staff members can become a mobile VITA site and prepare tax returns on laptops at pre-arranged locations, clients' homes, or work. Partnering with a community college can mean access to student volunteers and laptop computers for electronic filing. IRS offices may also loan computers to VITA sites. If traveling is difficult, videoconferences or webcasts can be used to conduct meetings, trainings, or to file tax returns. In addition, IRS' Virtual VITA allows organizations to partner with a VITA site in another location to file tax returns using technology. Contact your IRS Territory Manager to learn more about requirements and opportunities.

## CONNECT WITH

- County commissioners and town councils
- Local businesses, employers, and churches
- Small business owners
- Cooperative Extension Service
- Schools/Parent Teacher Associations



**3. Enlist local employers to help with outreach.** Small business owners can promote tax credits to their employees or volunteer to host a free tax site during non-business hours. Larger businesses like factories and farms can promote the tax credits as well. Rural areas with tourist attractions — such as bed and breakfasts, gift shops and restaurants — may employ workers who qualify for the EITC and CTC.

**4. Promote tax credits through schools.** Schools can be an important channel for tax credit information and may also serve as central location for VITA sites. Community colleges and universities provide an important avenue to reach out to some working parents and lower-income students not raising children.



## FURTHER RESOURCES

- **Cooperative Extension Office Finder** (<https://nifa.usda.gov/land-grant-colleges-and-universities-partner-website-directory>)
- **Rural Family Economic Success Action Network** ([rufes.org/](http://rufes.org/))

Contact statewide groups that may have connections in rural areas such as:

- **United Way** ([www.unitedway.org/find-your-united-way/](http://www.unitedway.org/find-your-united-way/))
- **Catholic Charities** ([catholiccharitiesusa.org/find-help](http://catholiccharitiesusa.org/find-help))
- **Local Health Departments** ([www.naccho.org/membership/lhd-directory](http://www.naccho.org/membership/lhd-directory))

# TRIBAL AND NATIVE COMMUNITIES

Efforts to improve the economic status of Native Americans – approximately one in four of whom live in families with income below the federal poverty line – are increasing. Poverty and other barriers to economic development among tribal communities stem from historical interactions with the federal government. Land trust regulations restricted resources and job opportunities. As a result, native communities are frequently guarded about relations with the federal government or people who are not part of their community. Eligible people in tribal communities may be hesitant to claim the credits.

## STRATEGIES

**1. Get to know the community.** There are 574 federally recognized tribes, bands, nations, pueblos, rancherias, communities, and Native villages, in addition to many other groups that are not federally recognized. It is important for outreach approaches and messages to be consistent with the values and beliefs of individual tribes. Find out from community members how to work with tribal elders or other leaders who play a pivotal role in influencing community priorities. To identify tribal leaders, visit the Tribal Leaders Directory ([www.bia.gov/WhoWeAre/BIA/OIS/TribalGovernmentServices/TribalDirectory/index.htm](http://www.bia.gov/WhoWeAre/BIA/OIS/TribalGovernmentServices/TribalDirectory/index.htm)).

**2. Partner with tribal community colleges and universities.** Often these schools serve as career centers, libraries, economic development centers, public meeting spaces, and child care centers. They may be able to provide space, computers, and volunteers to serve as free tax preparation sites. These schools can also provide tax credit information to students. Visit the American Indian Higher Education Consortium for information on tribal colleges and universities ([www.aihec.org/](http://www.aihec.org/)).

**3. Promote tax credits through Native media.** Native media can deliver information in the language or dialect of the community. Newspapers can publish stories about how tribal members benefited from the credits and they can advertise free tax filing assistance. Also reach out to non-Native media that might interest tribal members.

**4. Reach out to urban Native Americans.** More than 70 percent of the nearly seven million Native Americans nationwide live in urban communities. The following five cities have the largest American Indian and Alaska Native populations: New York, Los Angeles, Phoenix, Anchorage, and Oklahoma City.

## CONNECT WITH

- Tribal health agencies, urban Indian centers, tribal Head Start or housing agencies, and tribal councils
- Tribal community colleges and universities
- Native media
- Native-owned business



A photograph of a man with long dark hair and a beard, smiling and holding a baby. The man is wearing a dark blue long-sleeved shirt. The baby is wearing a dark blue long-sleeved shirt and blue jeans. They are outdoors with trees in the background. A teal diagonal shape is on the left side of the page, containing text.

## FURTHER RESOURCES

- **Building Native Communities: A Guide to Claiming the Earned Income Tax Credit** ([www.oweesta.org/wp-content/uploads/2015/08/BNCGuideforEITC.pdf](http://www.oweesta.org/wp-content/uploads/2015/08/BNCGuideforEITC.pdf))
- **Building Native Communities: A Tribal Leaders Guide to Launching an Earned Income Tax Credit (EITC) Campaign** ([www.oweesta.org/wp-content/uploads/2015/08/BNCEITCCampaign.pdf](http://www.oweesta.org/wp-content/uploads/2015/08/BNCEITCCampaign.pdf))
- **National Congress of American Indians** ([www.ncai.org/](http://www.ncai.org/))
- **Native Financial Education Coalition** ([nfec.us/](http://nfec.us/))



# WORKERS NOT LIVING WITH CHILDREN

Tax credits can represent a useful income boost for lower-wage workers who do not have children living with them. While workers not living with children receive only a small EITC (averaging less than \$300), some non-custodial parents may be eligible for a substantial CTC if they are permitted by a divorce or separation agreement to claim a child as a dependent. Outreach messages about both tax credits and free tax help are important to share.

## STRATEGIES

**1. Contact workers who are employed on-and-off.** Reach out to seasonal workers by distributing tax credit informational materials at pick-up and drop-off spots for day labor; hotel, motel, and other service worksites with seasonal employees; General Assistance, SNAP, or unemployment offices; and programs serving migrant workers.

**2. Provide tax credit information at child support decisions.** Work with a court to help get parents tax credit information when child support obligations are being established. Decisions about which parent claims the child as a dependent for tax purposes are often made at this time. Provide parents with information about the CTC while they're learning about the process for establishing child support.

**3. Enlist employers to reach out to their employees.** Employers are well-positioned to disseminate tax credit information to their employees. A special note about the availability of the CTC may be of particular interest to non-custodial parents whose child support payments are being deducted from their paycheck.

**4. Reach out to workers in school or training programs.** Distribute materials at universities with non-traditional students, community colleges, English as a Second Language or literacy programs, vocational rehabilitation centers, and job training programs.

**5. Get information to non-custodial parents.** Work with Child Support Enforcement (IV-D) agencies ([www.acf.hhs.gov/programs/css/resource/state-and-tribal-child-support-agency-contacts](http://www.acf.hhs.gov/programs/css/resource/state-and-tribal-child-support-agency-contacts)) — which establish and enforce child support orders — to provide non-custodial clients with tax credit information. Fatherhood Programs that help men develop in their role as fathers can also give non-custodial participants tax credit materials. Remind staff to explain that non-custodial parents who are eligible to claim the CTC must submit Form 8332, "Release/Revocation of Release of Claim to Exemption for Child by Custodial Parent," which requires the custodial parent's signature, with their tax return and Form 8812.





## CONNECT WITH

- Transitional housing programs
- Homeless shelters
- Food banks and soup kitchens
- Literacy or GED programs
- Probation offices
- Half-way houses or mental health or substance abuse service centers
- Child Support Enforcement agencies
- Fatherhood Programs
- Veterans Administration hospitals or service centers

## FURTHER RESOURCES

- **Veterans Services Locator** ([www.va.gov/directory/guide/home.asp](http://www.va.gov/directory/guide/home.asp))
- **Soup Kitchen, Food Pantry, & Food Bank Locator** ([www.foodpantries.org](http://www.foodpantries.org))
- **Homeless Assistance Finder** ([portal.hud.gov/hudportal/HUD?src=/topics/homelessness/localassist](http://portal.hud.gov/hudportal/HUD?src=/topics/homelessness/localassist))
- **National Fatherhood Initiative** (<http://www.fatherhood.org/>)

# MILITARY PERSONNEL AND RETURNING VETERANS

Many enlisted members of the military earn less than \$30,000 and are raising children. In addition, many National Guard members and Reservists have been activated for duty, which can result in a significant reduction in a family's income. When enlisted members transition out of the military, they tend to experience longer periods of unemployment than civilians and tend to earn lower wages. Military families and returning veterans may qualify for tax benefits such as the EITC and CTC, but not realize they are eligible.

## STRATEGIES

**1. Reach out to families of military personnel.** Make sure families are aware of the EITC, the CTC, and free tax filing assistance programs in their communities. Find them through Family Assistance Centers and organizations that provide support to families of units called up for active duty such as the American Red Cross ([www.redcross.org/find-your-local-chapter](http://www.redcross.org/find-your-local-chapter)) and the Boys and Girls Clubs of America ([www.bgca.org/whoweare/Pages/FindaClub.aspx](http://www.bgca.org/whoweare/Pages/FindaClub.aspx)).

**2. Incorporate tax credit outreach with programs for returning veterans.** The Transition Assistance Program ([www.taonline.com/TAPOffice](http://www.taonline.com/TAPOffice)) provides valuable resources for returning veterans, including assistance with finding jobs and information about benefits for veterans. TAP is well-positioned to disseminate tax credit information as well.





## CONNECT WITH

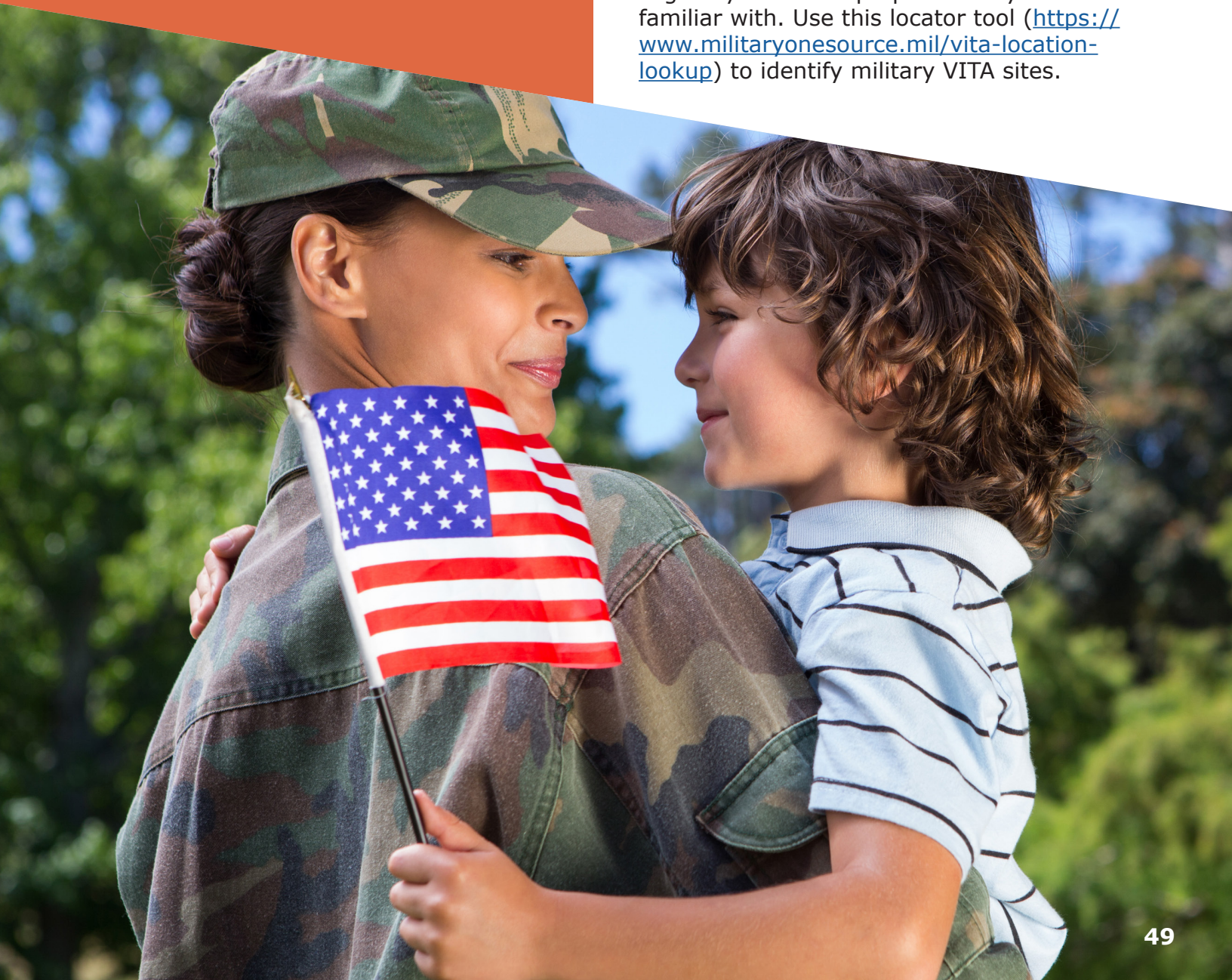
- Military units' Family Assistance Centers
- Local American Red Cross
- Local Boys and Girls Clubs of America
- Job training and vocational programs
- Programs designed to support returning veterans

## FURTHER RESOURCES

- **Veterans Services Locator** ([www.va.gov/directory/guide/home.asp](http://www.va.gov/directory/guide/home.asp))
- **National Military Family Association** ([www.militaryfamily.org](http://www.militaryfamily.org))

**3. Engage job training and vocational programs.** Returning veterans are often faced with the need to go back to school so that they can secure employment. Inform job training programs about the EITC, CTC, and free tax filing assistance.

**4. Work with VITA sites on military bases.** There are nearly 150 VITA sites at U.S. military installations. Contact these VITA sites and ask whether veterans recently leaving the military can use the VITA services offered at the post or base. Families that don't live near a military post and returning veterans may not get the relevant tax information they need since there are special rules about military combat pay and tax credit eligibility some tax preparers may not be familiar with. Use this locator tool (<https://www.militaryonesource.mil/vita-location-lookup>) to identify military VITA sites.





Center on Budget and Policy Priorities  
**Get It Back Campaign**  
1275 First Street, NE  
Suite 1200  
Washington, DC 20002  
[www.eitcoutreach.org](http://www.eitcoutreach.org)