

GetCTC.org

Step-by-step guide to using the GetCTC
Simplified Filing Tool

CODE for
AMERICA

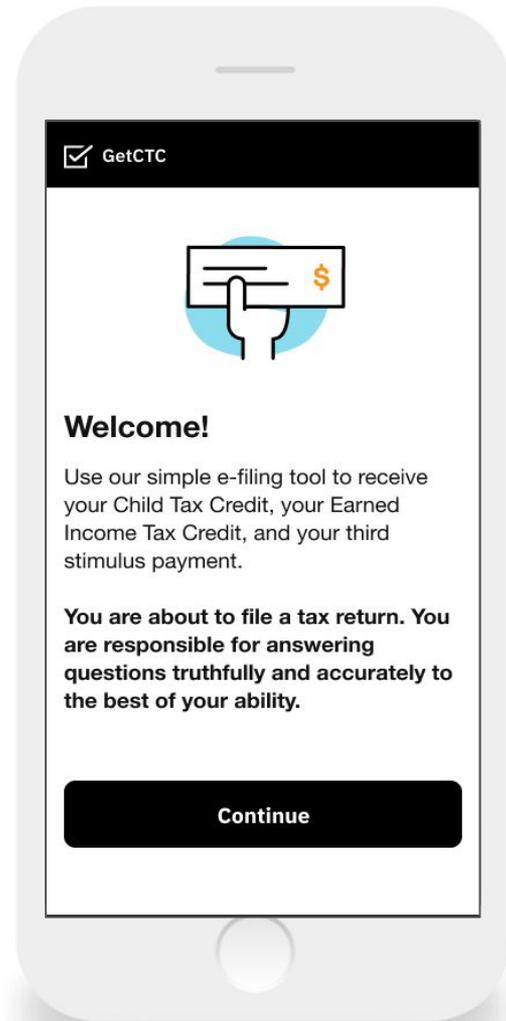


Simplified Filing Tool

For Child Tax Credit, Third Stimulus Payment, and Earned Income Tax Credit

Streamlined e-filing for CTC- and stimulus-eligible households with no filing requirement

- For low-income households with no filing requirement
- Available in English and Spanish
- Mobile and user-friendly
- Most clients will finish in less than 15 mins
- VITA-certified chat support
- Option to claim the Federal EITC
- **Open through November 15**



GetCTC Eligibility

To use GetCTC, clients cannot have a filing requirement. Generally speaking, that means they:

- Did not make more than \$12,550 if filing single or \$25,100 if filing married filing jointly in 2021
- Made less than \$400 in self-employment income (this includes gig employees) in 2021
- Are not filing married filing separately
- Did not receive Advance Premium Tax Credits through health insurance marketplace in 2021
- Do not have to repay the 2008 first-time homebuyer credit
- Do not owe any other special taxes or fit other circumstances as listed on page A-3 of [IRS Pub 4012](#)

In addition, they:

- Lived in any of the 50 states, the District of Columbia, Puerto Rico, or a US military facility for over half of 2021
- Have not been claimed on someone else's tax return in 2021
- Have not already filed a 2021 return
- Did not buy or sell cryptocurrency
- Are not required to file forms 8862 or 8332

Features and Recommendations

- Based on user feedback, the tool only asks a limited number of questions (1-2) per screen. While this adds more pages to the tool, we believe this better serves users in correctly completing their return.
- To use the tool in Spanish, go to: GetCTC.org/es
 - ◆ To get to the Spanish tool within your unique URL link, use the following format and replace “sample” with your URL: GetCTC.org/es/sample.
 - ◆ If users get started in English and want to switch to Spanish, they can click “Español” at the top of the page at any time.
- You can send clients directly to two other landing pages, using your unique URL:
 - ◆ Stimulus focused page: Getctc.org/stimulus?s=YourURL
 - ◆ Puerto Rico landing page: Getctc.org/puertorico?s=YourURL
 - Note, this just changes the landing page. Puerto Rico and Stimulus-only clients can use the tool from GetCTC.org with the same result
- If you or the client gets stuck, you can use the “Chat with us” button located on each page to be connected with an IRS-certified customer success advocate.
- Clients without children can use the tool to claim any amount of their missing third stimulus payment. To claim the 1st and 2nd stimulus payments, they will need to file a 2020 tax return.
- Use incognito mode or a private page to pull up GetCTC when helping clients access the tool to prevent sensitive information being stored on the device.
- Clients will be able to log back into the tool after verifying their contact information. This may be helpful if they don’t have all of their information or want to complete it at a later time.

Limitations: GetCTC is a simple tool embedded in a complicated system

Last year we found that simplified filing was a success

- Over 115,000 accepted returns
- 78% found the tool “easy” or “extremely easy” — including first-time filers
- Typical experience: finish the tool in less than 15 minutes, on mobile phone
- Over 95% did not request assistance

However, this is a simple tool embedded in a complicated system. Many clients face additional challenges in accessing their tax benefits that cannot be resolved through simplified filing. Including those who:

- Already filed a return this year but their refund wasn't issued
- Are already claimed or have a qualifying dependent that was previously claimed
- Are unable to access their Identity Protection PIN (see additional details [here](#))
- Need to apply for an Individual Taxpayer Identification Number (ITIN)

Helping clients with these additional challenges is a critical service, but won't show up in the count of accepted GetCTC returns. We encourage you to consider collecting additional metrics like:

- # assisted in filing a paper tax return (for purposes not addressable w/ e-filed returns)
- # assisted in retrieving their IP PIN
- # assisted in completing required post-return steps, like resolving a rejected return or responding to an IRS letter

Claiming Earned Income Tax Credit: Limitations and Considerations

To claim EITC through GetCTC, clients must:

- Meet the [basic eligibility to use GetCTC](#)
- Have SSNs valid for employment
- Have earned income reported on a W-2
- Meet age requirements
 - ◆ Any age if claiming a qualifying child
 - ◆ If not claiming a qualifying child:
 - Over 24
 - 19-24 and not a full-time student for more than 4 months in 2021
 - 18 if they were a qualified former foster youth or qualified homeless youth.
- Make less than \$10,000 in investment income

Additional considerations:

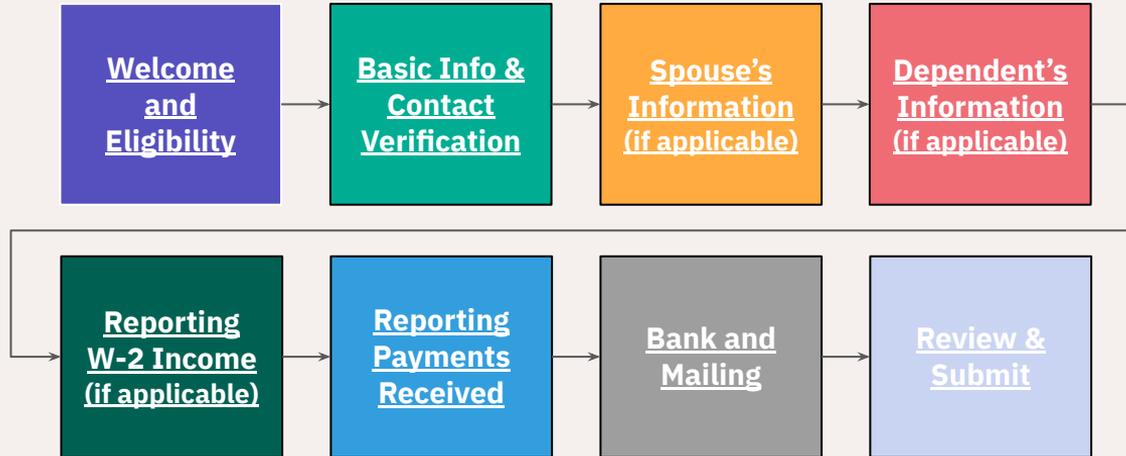
- To claim the credit, clients will need to provide W-2 information - which is no longer a “simplified” process. We know that finding tax documents and reporting income is a major barrier for new and intermittent filers.
- They do not have to report non-W2 income (as long as their total income is less than the filing threshold)
- We accommodate additional EITC eligibility questions into the household information questions
- They will also be able to claim any federal income tax withholding reported on their W-2
- Any client who chooses not to add their W-2s or is ineligible for the EITC (including filers in Puerto Rico) can use GetCTC exactly as they always have to claim the CTC and/or third stimulus payment

[Read more](#) about this new functionality and what we hope to learn from its addition in our recent post.

GetCTC Questionnaire by Section

Below are the different sections of the GetCTC questionnaire. This guide is color coded with each section of the questionnaire so that you can easily jump to that section if a client needs assistance.

You can also click on their tiles below to jump to that section of the guide.



Welcome & Eligibility

Intro questions to ensure this is the right tool for your clients

Welcome Page



Welcome!

Use our simple e-filing tool to receive your Child Tax Credit, your Earned Income Tax Credit, and your third stimulus payment.

You are about to file a tax return. You are responsible for answering questions truthfully and accurately to the best of your ability.

Continue

Eligibility Part 1: Main Home & Puerto Rico

[← Go back](#)

Where did you live for most of 2021?

Select the location where you spent more than half of 2021.

Any of the 50 states or the District of Columbia

U.S. military facility

Puerto Rico

Other U.S. territory (such as Guam, American Samoa, U.S. Virgin Islands)

Foreign address

[What if I did not live anywhere for more than 6 months last year? >](#)

Continue

 Chat with us

To qualify for simplified filing, clients must live in the US, at a US military facility, or in Puerto Rico for over half of 2021.

If they live elsewhere, they'll be given the option to file a full tax return through [GetYourRefund.org](https://getyourrefund.org)

If they select Puerto Rico as their main home, they will see a slightly modified flow from what is shown in this guide. For more information see the Puerto Rico GetCTC Guide at [GetCTC.org/navigators](https://getctc.org/navigators).

Eligibility Part 2: Filing Status and Income Threshold

For purposes of this tool, clients legally married as of December 31, 2021, must file jointly with their spouse. If they need to file separately, they'll have to file a full tax return.

If they select "no" they will skip the spouse-related questions and the tool will adjust the income threshold accordingly.

[← Go back](#)



As of December 31, 2021, were you legally married?

Yes No

[Does the IRS consider me to be married? >](#)

[What if I'm married but want to file without my spouse? >](#)

[What if my spouse died last year? >](#)

Clients must confirm they did not make more than their filing threshold or have any other filing requirements.

Note: Filers who have \$400+ in self-employment income or received Advance Premium Tax Credits (for health insurance purchased through healthcare.gov or a state marketplace) have a filing requirement and are not eligible for this tool.

If filing single

[← Go back](#)



You can only use GetCTC if, in 2021, you:

- earned less than \$12,550 in total income
- earned less than \$400 in self-employment income
- did not receive the Advance Premium Tax Credit
- are not required to file a full tax return for any other reason

[What counts as income? >](#)

[What counts as self-employment income? >](#)

[What is the Advance Premium Tax Credit? >](#)

[Continue](#)

[I can't use GetCTC](#)

If filing married

[← Go back](#)



You can only use GetCTC if, in 2021, you and your spouse:

- earned less than \$25,100 in total income
- earned less than \$400 in self-employment income
- did not receive the Advance Premium Tax Credit
- are not required to file a full tax return for any other reason

[What counts as income? >](#)

[What counts as self-employment income? >](#)

[What is the Advance Premium Tax Credit? >](#)

[Continue](#)

[I cannot use GetCTC](#)

Eligibility Part 3: Full service option



You are currently filing a simplified federal tax return.

You can file a simplified tax return to claim the:

- Child Tax Credit
- 3rd Stimulus Check
- Earned Income Tax Credit

You cannot use this tool to claim:

- Stimulus check 1 or 2
- State tax credits or stimulus payments

If you have income that is reported on a 1099-NEC or a 1099-K you should file a full tax return instead.

[How can I get the first two stimulus payments? >](#)

[Continue filing a simplified return](#)

[Learn more about full filing](#)

If they indicate they can use GetCTC, they will be asked if they would like to learn about filing a full tax return to claim all eligible credits.

This may be a good option if they have all their tax documents, can wait until next year to file, and qualify for additional benefits. Otherwise, they should continue filing a simplified return.

Note: Most full filing options are closed for the year. Clients will have the option to sign up for a notification when GetYourRefund reopens in January 2023.

Claiming the EITC



Would you like to claim more money by sharing any 2021 W2 forms?

The Earned Income Tax Credit (EITC) is a tax credit that can give you up to \$6,700.

📌 Requirements:

- You have a job earning money in 2021
- Each person on this return has an SSN

Yes, claim EITC

No, continue without EITC

GetCTC clients now have the option to claim the EITC by sharing 2021 W-2 forms. See EITC eligibility and additional considerations for more information about this new option.

Clients who select “Yes, claim EITC” will see a few additional eligibility questions while providing their household information and, if they qualify, be asked to report information from their W-2s.

Clients who select “No, continue without EITC” will not be shown these additional questions.

Eligibility Part 3: Rare cases and 2021 tax return

There are some cases in which you may not be able to use GetCTC, but they are rare.

You can not use GetCTC if:

- you have previously had the CTC or the EITC reduced or disallowed by an IRS investigation and you have not properly filed Form 8862 since then
- you have income in tips from a service job that was not reported to your employer
- you want to file Form 8332 in order to claim a child who does not live with you
- you are claiming a qualifying relative under a "multiple support agreement" as defined by the IRS
- you are not claiming any children for the Child Tax Credit this year, but you received Advance Child Tax Credit payments in 2021
- you bought or sold cryptocurrency

What is a multiple support agreement? >

Continue

I can't use GetCTC

This page lists several rare cases that would also disqualify someone from using GetCTC. It's important for clients to read through all the cases before continuing. A few notes on these cases:

- **Reduced or disallowed CTC:** Clients should have received a letter from the IRS letting them know about the reduction or disallowed amount from a prior year. This does not include clients that filed for AdvCTC payments last year and never received them.
- **Form 8332:** Generally, in order to qualify for the CTC the child must live with you for over half the year or receive consent to claim the child from the custodial parent using Form 8332. The noncustodial parent would attach the signed form to their tax return. Attaching this form is not supported in GetCTC.

If they cannot use GetCTC, they'll be directed to [GetYourRefund.org](https://www.getyourrefund.org)

← Go back



Did you file a 2021 tax return this year?

If you already filed a 2021 tax return, the IRS will reject your GetCTC return without looking at it.

Answer yes even if you are still waiting for your payment or think you made a mistake.

✓ Yes

✗ No

If they already filed a 2021 return, they cannot e-file another return for that year. If they need to update their information, they will need to do so by filing an amended tax return.

Filers in this situation will not be able to continue using the tool but instead given the option to contact a VITA site or Taxpayer Advocate Service.

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Eligibility Part 4: Filer dependency status

<p>← Go back</p> <p>x% complete</p>  <p>Can anyone else claim you on their 2021 tax return?</p> <p>Generally, someone can claim you as a dependent if they are your family member, you lived with them most of the year, and they paid for most of your living expenses.</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>If the client can be claimed as a dependent, they do not benefit from filing a simplified tax return because they do not qualify for the Child Tax Credit, 3rd stimulus payment, or Earned Income Tax Credit.</p> <p>They are routed to the screen that offboards them to GetYourRefund.org. Dependents may benefit by filing a full tax return if they had withholdings from a job.</p>
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Ineligibility and Offboarding Page

← Go back

55%



You do not qualify for the Earned Income Tax Credit, but there's still money waiting for you!

Continue with GetCTC to claim your Child Tax Credit and/or missing stimulus payments.

Continue

If they answer a question or enter information that makes them ineligible for the EITC but they still qualify for GetCTC, they are notified that they don't qualify for the EITC but can continue using the tool to claim their CTC and/or missing third stimulus payment.

← Go back



Unfortunately, you are not eligible to use GetCTC.

[Why am I ineligible?](#)

You could still benefit by filing a full tax return for free using GetYourRefund.

File with GetYourRefund

[Visit our FAQ](#)

If they made over the filing threshold, indicate that they have a different filing requirement, or answer any other question that indicate they are ineligible for GetCTC, they are given the option to file a full tax return through GetYourRefund.

Basic Information and Contact Info

The primary client enters their basic information and verifies their contact information

Basic Information:

The following screen (split into two images) asks the client to provide their basic information. The information provided is used to prepare their simplified tax return. Client should take their time to enter all the information correctly. Errors on this page may result in a rejected return.

In order to file, we need some basic information.

Enter your name exactly as it appears on your Social Security card or Individual Taxpayer Identification Number (ITIN) letter.

If you are trying to claim tax benefits for your child, enter your own information here. You will enter your child's information later.

Legal first name

Legal middle initial (optional)

Legal last name

Suffix (optional)

Date of birth

mm/dd/yyyy

By legal name, the form is asking for the client's name as it appears on their social security card or ITIN.

If the client has two legal last names, they should enter both under legal last name.

Form of identity

Social Security Number (SSN) ▼

SSN or ITIN

Confirm SSN or ITIN

My Social Security card has
 "not valid for employment"
printed on it. (This is rare)

Phone number

I was a member of the
 United States Armed
Forces for any time in 2021

I was legally blind in 2021

I agree to GetCTC's [privacy policy](#) and to share my personal information in order to prepare my simplified tax return.

Continue

The tool is only available to someone with a SSN or ITIN. If the client has not yet applied for an ITIN, they will need to seek assistance elsewhere.

If someone enters a SSN or ITIN that was already used in GetCTC, they'll see a page telling them they already started and a link to log in to continue.

Most SSNs are valid for employment, including all US citizens' SSNs. Do not check this box if they have an ITIN.

A phone number is required by the IRS. This can be different than their preferred contact information, which is entered later.

ITIN filers that are members of the US Armed Forces are eligible for third stimulus.

Clients must agree to the [privacy policy](#) before continuing.

2020 Filing Status and Adjusted Gross Income

[← Go back](#)



Did you file a 2020 tax return?

Your 2020 tax return would have originally been due on May 17, 2021 and would have typically been completed in 2021.

Yes, I filed a full tax return

Yes, I filed using the IRS non-filer portal or GetCTC

No, I didn't file a 2020 tax return

[Continue](#)

If clients filed a full 2020 tax return, they must report their 2020 AGI to efile their simplified return. The IRS requires this for authentication purposes.

If they didn't file a return, the software automatically fills in \$0 as their AGI.

If they used a non-filer tool, the software automatically fills in \$1 as their AGI.

[← Go back](#)



What was your 2020 Adjusted Gross Income?

Because you filed a tax return for 2020, the IRS requires you to verify your Adjusted Gross Income (AGI).

You can find this number on Line 11 of your 2020 tax return. Please enter the exact number from your 2020 return without estimating or rounding or your return will be rejected.

2020 Adjusted Gross Income

[Continue](#)

This screen only appears if the client previously marked that they filed a 2020 tax return (typically filed in 2021). In order to efile their return, they'll need to enter their exact 2020 AGI.

This can be found on line 11 of their 2020 Form 1040.

Their return will reject without the correct AGI.

If they did not file a 2020 tax return, they'll need to go back to select a different option.

Verifying Contact Information

In order to proceed, clients must enter a phone number that can receive texts **or** an email address. This contact information will be used to send clients updates about their simplified return and is used in lieu of a username and password so that the client can easily log back into GetCTC.

[← Go back](#)



What is the best way to reach you?

We'll send a code to verify your contact information so that we can send updates on your return. Please select the option that works best!

Note: Standard SMS message rates apply. We will not share your information with any outside parties.

[Text me](#)

[Email me](#)

If they enter cell phone number

[← Go back](#)



Please share your cell phone number.

Cell phone number

Confirm cell phone number

[Continue](#)

If they enter email address

[← Go back](#)



Please share your email address.

Email address

Confirm email address

[Continue](#)

[← Go back](#)



Let's verify that contact info with a code!

A message with your code has been sent to: **philipbanks@judge.gov**

Enter 6 digit code

[Verify](#)

[Resend code](#)

A verification code is sent via text or email. It may take a few minutes to arrive.

If sent via email, it will be sent from “hello” and the subject line will say “Update from GetCTC”

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EITC Eligibility (filing single)



Did you earn more than \$10,000 in investment income?

In general, investment income includes interest, dividends, capital gains, and mutual fund distributions.

[How do I check my investment income amount? >](#)

✓ Yes

✗ No

This is an additional qualifying question for the EITC.

In order to qualify for the EITC, the client must not earn more than \$10,000 in investment income

If the client is filing married filing jointly, they will see this screen after entering their spouse's information.

Spouse's Information

The following questions are only asked if a client marks married filing jointly

Entering Spouse's Basic Information

The following screen (split into two images) asks for the spouse's basic information. This is the same information collected from the [primary taxpayer](#). It's important the client or spouse takes their time to enter the information correctly. Errors on this page may result in a rejected return.

← Go back

Tell us about your spouse.

Enter your spouse's name exactly as it appears on their Social Security card or Individual Taxpayer Identification Number (ITIN) letter.

Spouse's legal first name

Spouse's legal middle initial (optional)

Spouse's legal last name

Suffix (optional)

Spouse's date of birth
mm / dd / yyyy

Spouse's form of identity

Social Security Number (SSN) ▼

Spouse's SSN or ITIN

Confirm spouse's SSN or ITIN

Their Social Security card has "not valid for employment" printed on it. (This is rare)

My spouse was a member of the United States Armed Forces for any time in 2020

My spouse was legally blind in 2021

Save this person

Remove this person

← Go back

x% complete

You're about to remove [spouse].

Is that ok?

Yes, remove them

Nevermind, let's save them

Spouse's 2020 Return and AGI

← Go back



Did #SpouseFirstName file a 2020 tax return?

A 2020 tax return would have originally been due on May 17, 2021 and would have typically been completed in 2021.

- My spouse filed taxes or used a non-filer tool with me
- My spouse used the IRS non-filer tool or GetCTC separately from me
- My spouse filed a full tax return separately from me
- My spouse did not file a 2020 tax return

Continue

To correctly file the return, we'll need to know how the spouse filed their 2020 tax return.

← Go back



What was #SpouseFirstName's 2020 Adjusted Gross Income?

Because your spouse filed a tax return for 2020, the IRS requires them to verify their Adjusted Gross Income (AGI).

You can find this number on Line 11 of their 2020 tax return. Please enter the exact number from their 2020 return without estimating or rounding or their return will be rejected.

2020 Adjusted Gross Income

Continue

This screen is displayed if the client marks that the spouse filed a full tax return separately from them. For any other answers, it automatically determines the AGI.

In order to efile their return, they'll need to enter their exact 2020 AGI.

This can be found on line 11 of their tax year 2020 Form 1040.

Their return will reject without the correct AGI.

Review Spouse's Information

← Go back

x% complete

Let's confirm your spouse's information.

We have added the following person as your spouse on your return.

Your spouse

 Vivian Catherine Banks

Date of birth: 3/16/67
SSN: XXX-XX-3456

This screen gives the client and/or spouse the chance to double check their information. They should click “edit” if they find an error or click “Continue” if everything looks right.

EITC Eligibility with Spouse



Did you and your spouse earn more than \$10,000 in investment income?

In general, investment income includes interest, dividends, capital gains, and mutual fund distributions.

[How do I check my investment income amount? >](#)

✓ Yes

✗ No

This is an additional qualifying question for the EITC.

In order to qualify for the EITC, the client and their spouse must not earn more than \$10,000 in investment income

Dependents' Information

These questions are only asked if a client marks that they would like to claim a dependent

Adding a Dependent



To claim your Child Tax Credit, you must add your dependents (children or others who you financially support)

Anyone who you support financially or who lived with you might qualify you for additional benefits, we'll help you figure it out.

Which relationships qualify? >

+ Add dependents

Continue without dependents

Client should select 'add dependents' even if they are not sure whether they can claim someone. The tool asks clients a series of questions to determine if the individual is a qualifying dependent.

51%

You will not receive the Child Tax Credit, but you may continue to collect your third stimulus payment.

Based on your current answers you will not receive the Child Tax Credit, because you have no eligible dependents.

Continue

Add more dependents

If the client does not add anyone to their tax return, they'll see this screen warning them that they don't qualify for the Child Tax Credit.

Clients who don't have a dependent will skip to the [W-2](#) or [recovering missed stimulus payment section](#).

Entering Dependent's Basic Information

The following screen (split into two images) asks for the dependent's basic information. It's important the client takes their time to enter the information correctly. Errors on this page may result in a rejected return.

← Go back

x% complete

Let's get their basic information!

To avoid delays, please provide this person's legal information as it is written on their identification card.

Legal first name

Legal middle initial (optional)

Legal last name

Suffix (optional)

Date of birth
mm / dd / yyyy

By legal name, the form is asking for the name as it appears on their social security card or ITIN letter.

If the dependent has two legal last names, they should enter both under legal last name.

What is their relationship to you?

Child ▾

Does my child qualify? >

Dependent form of identity

Social Security Number (SSN) ▾

Dependent SSN or ATIN

Confirm SSN or ATIN

This person's SSN card has "Not valid for employment" printed on it. (This is rare)

What if my dependent has an ITIN? >

Select if the following is true:

This person is married and filing taxes with their spouse

Continue

There are two types of dependents: "qualifying child" and "qualifying relative." The information entered on this page is used to determine which one this dependent may be. Make sure clients take the time to read each question and answer to the best of their knowledge.

Depending on the information entered, they will be taken to different questions to determine if that individual qualifies. Those options are shown on the next four slides.

For purposes of this tool, dependents must have a SSN or and Adoption Taxpayer Identification Number (ATIN). ITIN dependents do not qualify for the CTC, third stimulus payment, or EITC.

Most SSNs are valid for employment. Do not check this box if they have an ATIN.

Option 1: Qualifying Child Part 1

These questions help determine if the person is a qualifying child. Use the drop down boxes to learn more about various legal terms.

Clients only see this screen if the person added is over the age of 19

← Go back

Great, let's make sure [person] qualifies!

Select any situations that were true in 2021:

[person] was a full-time student

[person] was permanently and totally disabled

None of these

Who is considered a full-time student? >

What is the definition of permanently and totally disabled? >

Continue

← Go back

x% complete

Did [person] pay for more than half of their own living expenses in 2021?

✓ Yes

✗ No

How many months did Tina live with you in 2021?

If they were born, adopted, or passed away in 2021, select 12 months.

less than 6 months ▾

What if my dependent was away for some time in 2021? >

Continue

Generally, the client needs to live with their dependent for at least 6 months out of the year. Clients should include any months dependents lived at a temporary location, like school, a medical facility, or a juvenile facility during 2021 as months lived in the home with the client. If they lived with the client for less than 6 months, they'll be asked additional questions to determine if they are a qualifying relative for purposes of the third stimulus payment.

Option 1: Qualifying Child Part 2

← Go back

x% complete



Are you the only person who could claim [person]?

If someone else also takes care of [person], only one of you may claim them for tax benefits. We will guide you through the steps to figure out if you can claim them or not.

Yes No

← Go back

x% complete



Here's how to check if you can claim [dependent].

If you and the other person who could claim the dependent are both their legal parents...

- Whoever lived with [person] for longer in 2021 has the right to claim them.
- If you both spent the same time living with [person] in 2021, then whichever parent made more money in 2021 can claim [person].

If you are [person]'s legal parent and the other person who could claim them is not then you can claim them.

What is a legal parent? >

What if I am not their legal parent? >

Yes, claim [name]

No, don't claim [name]

Certain family dynamics and agreements may mean that multiple individuals are eligible to claim the same dependent; however, that dependent can only be claimed on one tax return each year. Clients may consider pausing at this point to get in touch with any other family members who could have claimed the dependent.

If they aren't the only person, there are a few tiebreaker rules to determine who has the strongest claim to the dependent.

This page summarizes those tiebreaker rules to help the client decide if they should claim the person.

If they don't have the strongest claim to the dependent but claim anyway and their return is accepted, they may have to repay credits from that child, plus penalties.

Option 2: Qualifying Relative

Dependents who are not a qualifying child but still may be a qualifying relative are shown the following pages. **All** of these conditions have to be true for this to be a qualifying relative.

← Go back

x% complete

Did [person] live with you for the entire year in 2021?

Yes No

This screen is only displayed if they selected “Other descendants of my siblings” and “other relationship not listed”

← Go back

x% complete

Did you pay more than half of [person's] living expenses in 2021?

Yes No

Note, there's a small but important difference between this screen and a previous one.

To be a qualifying relative, the client must pay over half of the person's living expenses. (This screen)

To be a qualifying child, the *child* must pay less than half of their *own* support — regardless of what fraction the client pays.

← Go back

We just need to verify a few more things.

Select any situations that were true in 2021:

[person] earned less than \$4,300 in gross income.

[person] did not live with someone else who could claim them.

None of these

What is gross income? >

Continue

Does Not Qualify as a Dependent

← Go back

46%

**You can not claim benefits for Tony.
Would you like to add anyone else?**

We will not save Tony to your tax return. They do not qualify for any tax credits.

Why doesn't this person qualify? >

✓ Yes

✗ No

If at any time the the answer to a question indicates the person is not a qualifying dependent, they are shown this screen. Below are a list of reasons someone may not be a qualifying dependent:

- The person was born in 2022 (only dependents born in 2021 or earlier can be claimed on a 2021 tax return)
- The person may not meet the age requirement. Most dependents are under the age of 19, or 24 and a full-time student.
- The person doesn't live with the client for the required amount of time. In most cases, either half the year or the full-year.
- The person might be financially independent. In most cases, your dependent cannot pay over half of their living expenses.
- The person might be someone else's dependent.

Dependent Confirmation Page

Let's confirm!

Here are the credits your dependents are eligible for in 2021.
Please be aware that each credit has its own set of eligibility rules.

	CTC	EITC	Stimulus
Tina Belcher DOB: 10/17/2020 <input type="button" value="edit"/>	✗	✗	✓
Gene Belcher DOB: 8/8/2001 <input type="button" value="edit"/>	✗	✓	✓
Louise Belcher DOB: 7/7/2018 <input type="button" value="edit"/>	✓	✓	✓

 Add another person

Done adding dependents

Once a dependent is added, the client can review their listed dependents, see which credits their dependents are eligible for, and be given a chance to edit and add any other dependents.

In the example to the left, you'll see three dependents, all qualifying for different credits.

- The first listed dependent is an example of a dependent that meets the requirements of a qualifying relative but not a qualifying child. In this case they did not live with the client for over half the year.
- The second listed dependent is a qualifying child that has aged out of the Child Tax Credit.
- The third dependent is a qualifying child for all three credits (meets age, residency, relationship, and other qualifying criteria)

Reporting W-2 Income and Other EITC questions

In order to receive the EITC, clients must report all 2021 W-2 income.
Clients only see this screen if they indicate they want to claim the EITC

Additional EITC Qualification

This page is only shown to clients between the ages of 18-24, with no EITC-qualifying children.

In order to qualify for the EITC, they must be either:

- Ages 19-24 and not a full-time student for more than 4 months in 2021
- Age 18-24 and a qualified former foster youth or qualified homeless youth.

← Go back

54%

Select any of the situations that were true in 2021:

I was a qualified former foster youth

I was a qualified homeless youth

I was not a full time student

I was a full time student for less than 4 months

None of the above

Am I a qualified former foster youth? >

Am I a qualified homeless youth? >

What is a full-time student? >

Continue

Additional EITC Qualification

This page is only shown to clients between the ages of 18-24, with no EITC-qualifying children.

In order to qualify for the EITC, they must be either:

- Ages 19-24 and not a full-time student for more than 4 months in 2021
- Age 18-24 and a qualified former foster youth or qualified homeless youth.

← Go back

54%

Select any of the situations that were true in 2021:

I was a qualified former foster youth

I was a qualified homeless youth

I was not a full time student

I was a full time student for less than 4 months

None of the above

Am I a qualified former foster youth? >

Am I a qualified homeless youth? >

What is a full-time student? >

Continue

Adding a W-2

If the client indicates they want to claim the EITC, they'll be asked to report all 2021 W-2 income.

If they have their W-2s but do not have it available while completing GetCTC, they can log out and add their W-2 at a later time.

If they worked in 2021 but do not have a copy of their W-2 they can try retrieving a copy of their W-2. To do so they can:

- Request a replacement copy from their 2021 employer(s)
- Request an UNMASKED wage and income transcript from the IRS. This type of transcript cannot be requested online. Clients must talk to an IRS representative over the phone or [in-person](#) to verbally request an UNMASKED wage and income transcript.
- Request a transcript from their state's Department of Revenue or Franchise Tax board *if* state transcripts list all relevant federal information

If they think it's unlikely that they'll be able to retrieve their W-2, they can select "I don't want to add my W-2." They won't be able to claim the EITC but can continue using the tool to claim the CTC or missing third stimulus payment like normal.

Note: Some clients may have worked in 2021 but were considered a contractor or self-employed and received a 1099 form or were expected to keep their own records. If they made over \$400 in self-employment income, they do not qualify for this tool and must file a full tax return.

Please share the income from your W-2.

A W-2 is an official tax form given to you by your employer. Enter all of you and your spouse's W-2s to get the Earned Income Tax Credit and avoid delays.

The form you enter must have W-2 printed on top or it will not be accepted.

What if I haven't received my W-2? >

What if I have a 1099? >

Note: If you do not add a W-2 you will not receive the Earned Income Tax Credit. However, you can still claim the other credits if available to you.

 Add a W-2

I don't want to add my W-2

Log out and add a W-2 later

If they say they don't want to add their W-2, they'll see a warning screen to confirm that they want to continue without claiming the EITC



In order to claim your EITC, you need to add the income from your W-2.

You may continue with GetCTC to claim your Child Tax Credit and/or missing stimulus payments. If you'd like to add your W-2 later, you may do so.

Continue without EITC

Add my W-2 now

Log out and add a W-2 later

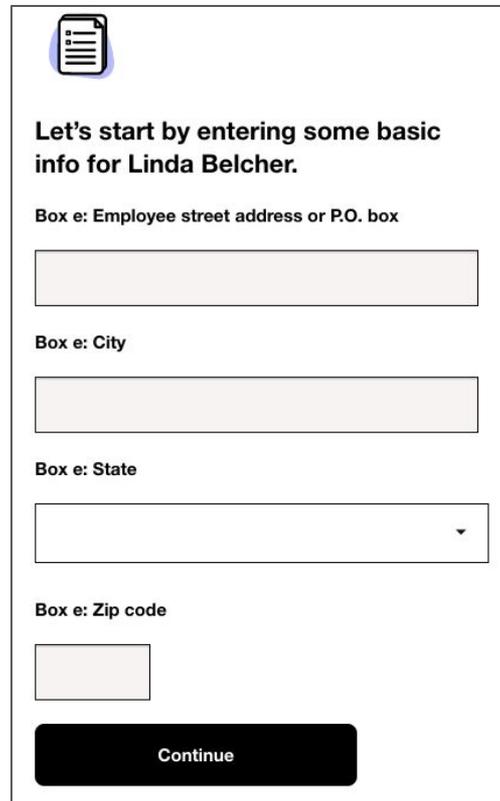
Page 1: Reporting W-2 Income

The first W-2 page asks for the employee's information, as listed on the W-2.

The mailing address listed on the W-2 may be different than their current mailing address. Clients should enter the address listed on their W-2. They will have a chance to enter their current mailing at the end of the tool.

If the client is married, they will select the owner of the W2 (primary or spouse)

Note: the IRS requires that W2 information matches *exactly* as it appears on their W2.



The screenshot shows a form titled "Let's start by entering some basic info for Linda Belcher." It contains four input fields: "Box e: Employee street address or P.O. box" (a wide text box), "Box e: City" (a wide text box), "Box e: State" (a dropdown menu), and "Box e: Zip code" (a small text box). A "Continue" button is located at the bottom of the form.



Let's start by entering some basic info for Linda Belcher.

Box e: Employee street address or P.O. box

Box e: City

Box e: State

Box e: Zip code

Continue

Page 2: Reporting W-2 Income

Page 2, split into the following two images, asks for information listed in boxes 1-10 of their W-2. Clients must enter information exactly as it appears on their W-2s.

Amounts listed in Boxes 8 and 9 make the client ineligible for GetCTC



Great! Please enter all of Linda Belcher's wages, tips, and taxes withheld from this W-2.

Requirement:

Please enter the information **exactly** as it appears on your W-2. If there are blank boxes on your W-2, please leave them blank in the boxes below as well.

Note: Please enter the information exactly as it appears on your W-2. If there are blank boxes on your W-2, please leave them blank in the boxes below as well.

Box 1: Wages Amount

Box 2: Federal Income Tax Withheld

Box 3: Social security wages

Box 4: Social security tax withheld

Box 5: Medicare wages and tips amount

Box 6: Medicare tax withheld

Box 7: Social security tips amount

Box 8: Allocated tips

Box 10: Dependent care benefits

Continue

Page 3: Reporting W-2 Income

Page 3, split into the following two images, asks for the employer's information.

Note: Employer Identification Numbers (EIN) in Box B can be challenging to find. They are often printed on different parts of a W-2 and occasionally in a smaller font. They are nine digits, usually listed in the following format: XX-XXXXXXX



Now we'll move into the employer section of Linda Belcher's W-2.

Requirement:

Please enter the information **exactly** as it appears on your W-2. If there are blank boxes on your W-2, please leave them blank in the boxes below as well.

Box b: Employer Identification Number (EIN)

Box c: Employer Name

Employer street address or P.O. box

City

State

Zip code

Box d: Control number

Continue

Page 4: Reporting W-2 Income

Page 4, broken into three images, asks for the remaining boxes from a W-2.

The following entries disqualifies someone from GetCTC:

- Box 12 with codes: A, B, K, L, M, N, R, V, W, Z
- Statutory employee checked in box 13

Although we're required to ask for state income tax withheld (Box 17) this payment cannot be claimed as a refund on a federal simplified return



Let's finish entering Linda Belcher's W-2 information.

Requirement:

- The following sections of your W-2 may likely be blank. If so, there is no problem; leave them blank in the boxes below.
- For Boxes 15-20, if your W-2 is filled with information for multiple states, please only enter the first state's information.

Box 11: Nonqualified plans

Box 12a:

Box 12b:

Box 12c:

Chat with us

Box 13: If marked on your W-2, select the matching option below

 Statutory employee Retirement plan Third-party sick pay

Box 14: Other

Box 15: State and Employer's State ID number

Box 16: State wages, tips, etc.

Box 17: State income tax

Box 18: Local wages, tips, etc.

Box 19: Local income tax

Box 20: Locality name

Submit W-2

Remove this W-2

Reviewing W-2 Income

Once a W-2 is added, the client can review and edit the information, add additional W-2s, or continue to the next section.

Please share the income from your W-2.

A W-2 is an official tax form given to you by your employer. Enter all of your W-2s to get the Earned Income Tax Credit and avoid delays.

The form you enter must have W-2 printed on top or it will not be accepted.

What if I haven't received my W-2? >

What if I have a 1099? >

 Sample Employer

edit

Wages: \$5,000

Delete this W-2

 Add a W-2

Finished adding all W-2s

Reporting Payments Received

Clients report the amount of AdvCTC and third stimulus payments received in 2021, to calculate their remaining refund.

Reporting Advance CTC Payments

If the client lists a CTC-eligible dependent, they'll be asked to report how much, if any, advance CTC payments they received in 2021. Based on their earlier responses, the tool estimates how much they should have received in 2021 if they filed in 2019 or 2020 and claimed the same children (half of their full 2021 credit).

If clients are unsure the exact amount they received, they should consult one of the following sources:

- IRS Letter 6419 (sent in January 2022)
- [Their online IRS account](#)
- Bank account statement

If they can not find the exact amount of CTC payments received and cannot log into their IRS account, they should report their best guess of how much they received. There is no penalty for reporting the wrong number, but it may delay their refund. The IRS may send them a letter letting them know about the adjustment.

If they filed married filing jointly last year, they should have received two letters. Those amounts should be added together to record the correct amount received.

Note: It's possible that some filers received an overpayment of AdvCTC payments, if they made under the filing threshold, they don't need to repay those payments but the software doesn't currently support those additional forms. They can go to [GetYourRefund.org](#) to file a full tax return.

← Go back



Did you receive a total of \$XYZ in Advance Child Tax Credit payments in 2021?

We estimate that you should have received:

\$1,200

for the following dependents:

- Child 1 Name
- Child 2 Name

These payments would have been received monthly between July and December 2021.

Where can I find this amount? >

Did you receive this amount?

I received this amount

I received a different amount

I didn't receive any payments

← Go back



Enter the total amount of Advance Child Tax Credit you received.

These payments would have been received monthly between July and December 2021.

If you enter an incorrect amount, the IRS will automatically correct it for you, but your payment may be delayed.

Where can I find this amount? >

Advance Child Tax Credit received

\$

Continue

← Go back

x% complete

Ok, we calculated your Child Tax Credit.

Amount you received

Total Advance CTC: \$1,200

You are eligible for an additional:

\$1,200

If the amount you entered is incorrect, the IRS will automatically correct it for you, but your payment may be delayed.

Continue

The software calculates the remaining amount to be claimed on this return.

Determining Missed Stimulus Payments

Clients who missed all or part of their 3rd stimulus payment may recover it as the Recovery Rebate Credit on this tax return. This payment was typically sent in March-May 2021 but could have been at any time after March 2021.

Based on the information already entered by the client, the tool calculates the amount of stimulus payment the client should have received.

If clients are unsure the exact amount they received, they should consult one of the following sources:

- IRS Letter 6475 (sent in January 2022)
- [Their online IRS account](#)
- Bank account statement

If the client received more than the reported amount, they do not have to repay the excess and should select they received this amount.



Did you receive a total of \$XYZ for your third stimulus payment?

We estimate that you should have received

\$4,200

based on your filing status and dependents.

The third stimulus payment was usually sent in March or April 2021 and was \$1,400 per adult tax filer plus \$1,400 per eligible dependent of any age.

For example, a parent caring for two children would have received \$4,200.

[How do I get the first two stimulus payments?](#)

Did you receive this amount?

I received this amount

I received a different amount

I didn't receive any payments



Enter the total amount you received for your third stimulus payment.

The third stimulus payment was usually sent in March or April 2021.

If you enter an incorrect amount, the IRS will automatically correct it for you, but your payment may be delayed.

How much did you receive?

\$

Reconciling 3rd Stimulus Payment

← Go back

x% complete

It looks like you received all of the third stimulus payment.

Amount you received

Third stimulus: \$4,200

Continue

If they indicated they received the full amount of their third stimulus payment, they will see this page to confirm they are not claiming any missing stimulus payments.

← Go back

x% complete

It looks like you are still owed some of the third stimulus payment.

Amount you received

Third stimulus: \$1,200

You are claiming an additional:

\$3,000

If the amount you entered is incorrect, the IRS will automatically correct it for you, but your payment may be delayed.

Continue

Clients see this screen if they indicated they didn't receive their full stimulus payment and the remaining amount to be claimed on this return.

Bank and Mailing

Clients enter how they would like to receive their payments

Selecting Payment Method

← Go back

x% complete



How would you like to receive any payments?

Direct deposit (fastest)

Mail my payment (slower)

Continue

Clients select how they'd prefer to receive their refund. Direct deposit is the fastest and most secure way to receive payments from the IRS.

Adding Bank Account Information

If client selects direct deposit, they will see the following screens. It's important that they take their time completing this information to ensure their refund is deposited into the correct account.

The information cannot be changed once a return is accepted and the client may lose access to their refund without additional assistance.

First screen is split into two images

← Go back



Please provide your bank details.

Bank name

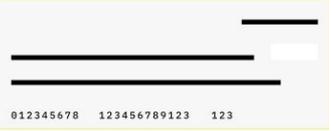
What type of account is this?

Checking

Savings

Your name must be on the bank account to receive a direct deposit.

I confirm that my name is on this bank account.



012345678 123456789123 123
routing number account number

Routing number

Confirm routing number

Account number

Confirm account number

Continue

80%



Great! Check to make sure your bank information is correct.

Your bank information

Public Service Credit Union
Type: Checking
Routing number: 012345678
Account number: ●●●●●●2198

Continue

Mailing Address

[← Go back](#)



Please provide your mailing address.

[What if I don't have a mailing address? >](#)

Street address or P. O. box

Apartment number (optional)

City

State

Zip code

[Continue](#)

Per IRS regulations, all clients must enter their mailing address, even if they select direct deposit as their payment preference.

If the IRS is unable to send a payment as direct deposit, they'll send it as a check in the mail to this address.

The IRS will also use this address to send any necessary communication to the client.

Clients should select a trusted mailing address that they will have access to through the end of the year.

[← Go back](#)

x% complete

Great! Please confirm your mailing address.

Your mailing address [edit](#)

26 WILLIAM ST
BEL AIR, CA 90001

Note: Address formatting may appear different to match US Postal Service standards.

[Confirm](#)

Review & Submit

Clients review the information they've entered and submit it to the IRS

Identity Protection PIN

← Go back

x% complete



Has anyone on your return been issued an IP PIN because of identity theft?

What is an IP PIN? >

Having an IP PIN is rare. If you are unfamiliar with an IP PIN, you likely have not been issued one.

Select 'None of the above' to continue.

[Client name]

[Spouse name]

[Dependent 1]

[Dependent 2]

None of the above

Continue

← Go back

x% complete



Please enter the IP PIN.

If you are a confirmed victim of identity theft and the IRS has resolved your tax account issues, the IRS will mail you a CP01A Notice with your IP PIN, a 6 digit number assigned to certain eligible tax filers.

The IRS issues you a new IP PIN every year, and you must provide this year's PIN.

[Click here to retrieve your IP PIN from the IRS.](#)

[Client's] IP PIN

[Spouse's] IP PIN

Continue

An Identity Protection PIN (IP PIN) is a six-digit number the IRS provides to people who have been victims of identity theft, or who opted into the IP PIN program.

If the client, their spouse, or dependents were issued an IP PIN, they need to include it on the return or it will reject.

If they lost their IP PIN, they can retrieve it online at [Get an IP PIN](#), by calling 800-908-4490, or visiting an [IRS Taxpayer Assistance Center](#) (appointments typically required).

If they are unable to retrieve their IP PIN, they will need to mail their return to the IRS and respond to the IRS verification letter.

Review Information and Select PIN

After completing this information, the client will be asked to review their information (split into two images).

Once the client confirms all the information is correct, they need to select a five-digit PIN to e-file their return.

This PIN is not their IP PIN.

They should record their PIN to verify their identity when filing next year's taxes.

Based on their return information, the client is shown what payments they are claiming on this tax return.



Please review and confirm your information.

You will not be able change your information once your tax return is accepted by the IRS.

Your information

Philip J Banks edit

Date of birth: 1/1/1950
SSN: XXX-XX-6789

Your address

Mailing address edit

26 Willi Smith Way
Bel Air, CA 90001

Your spouse

 Vivian C Banks edit

Date of birth: 3/16/67
SSN: XXX-XX-3456

Your dependents

 Ashley Banks edit

Date of birth: 5/12/97
SSN: XXX-XX-7890

Your bank information

Bank of Bel Air edit

Type: Checking
Routing Number: 1000000001
Account Number: XXXXXXXXXXX001

Select a five-digit signature PIN. This is a number that you choose as your own password. This PIN can be used to verify your identity when filing next year's tax return.

[Client's] Five Digit PIN

[Spouse's] Five Digit PIN

Continue

[← Go back](#)

94%

Review this list of the payments you are claiming:

You're almost done! Please continue to complete filing your tax return.

Child Tax Credit payments:
\$3,600

Third Stimulus Payment:
\$5,600

Earned Income Tax Credit:
\$2,000

Federal Income Tax Withholding:
\$600

Total refund amount:
\$11,800

Confirm

IRS language preference

Clients can now select the language they want the IRS to use when contacting them. Note: most communication is through letters in the mail.

[← Go back](#)

94%

What language do you want the IRS to use when they contact you?

The IRS may reach out with questions. You have the option to select a preferred language.

Please select your preferred language:

English ▾

Continue

Entering ID Information (optional)

The client and their spouse (if applicable) will be given the option to add information from their driver's license **or** state issued ID.

They can choose to skip this section if they don't have an ID or don't want to add it but this may prompt the IRS to request further verification, which will delay their refund.

[← Go back](#)

x% complete



Enter your driver's license information.

We use driver's license information to confirm your identity. If you don't have a driver's license you can skip this step.

Driver's license state

California ▾

Driver's license number

Issue Date
mm / dd / yyyy

Expiration Date
mm / dd / yyyy

Continue

Skip

[← Go back](#)

x% complete



Enter [spouse name]'s driver's license information.

We use driver's license information to confirm your spouse's identity. If they don't have a driver's license you can skip this step.

Spouse's driver's license state

California ▾

Spouse's driver's license number

Issue Date
mm / dd / yyyy

Expiration Date
mm / dd / yyyy

Continue

Skip

Efile consent, and return submitted to the IRS

← Go back

x% complete



Please read through the legal information before submitting your tax return.

Under penalties of perjury, I declare that I have examined this return (or request for refund) including any accompanying statements and schedules and, to the best of my knowledge and belief, it is true, correct, and complete.

I consent to allow my Intermediate Service Provider, transmitter, or Electronic Return Originator (ERO) to send my return (or request for refund) to the IRS and to receive the following information from the IRS: a) an acknowledgment of receipt or reason for rejection of transmission; b) an indication of any refund offset; c) the reason for any delay processing the return or refund; and d) the date of any refund.

I am signing this tax return by entering my self-selected signature PIN and associated electronic signature data on the previous page.

I agree

File my return

Clients must agree to the consent form in order for GetCTC.org to transmit their return to the IRS.

Once they mark “I agree” and click “File my return” their return will be transmitted to the IRS for processing.

After submitting their return, clients will see a screen that says their return has been e-filed and get a separate message via text or email letting them know their return has been submitted. This does not mean their return is accepted. They will receive another notification once their return has been accepted or rejected.

✔ CTC Portal

Thank you for filing with GetCTC!

Current tax return status:

📌 Electronically filed

Your return has been submitted to the IRS. You will know in 48 hours if your return has been accepted.

Download my tax return

Message my tax preparer

✔

GetCTC.org is a non-profit service built by [Code for America](#).

[Español](#)

[Service status](#)

✔ GetCTC

Sample Email

Your tax information has been successfully submitted!

Hello Test,

Your tax information has been successfully submitted to GetCTC!

We are currently processing your information to send it to the IRS. You will receive a confirmation email within 48 hours to let you know if your information has been accepted or rejected.

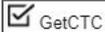
We're here to help!
Your tax team at GetCTC.org

Accepted Returns

If a client's return is accepted they will receive a notification via text or email. They can log back into the tool to view the current status and download their accepted return.

Note, an accepted return is no guarantee the IRS will issue the refund. They may find need to correct the amount claimed on the return or require additional information from the taxpayer. Make sure clients are keeping an eye out for any correspondence from the IRS.

Sample accepted email notification



GetCTC

Thank you for filing your taxes with GetCTC!

Hello Sarah,

Thank you for filing your taxes with GetCTC! Your taxes have been accepted by the IRS which means that they can begin processing your payments.

You can check the status of your payments with the IRS at <https://www.irs.gov/credits-deductions/child-tax-credit-update-portal>

Thank you for filing with GetCTC!

Current tax return status:

 Accepted

Your return has been accepted by the IRS.
You should receive a payment within 1-4 weeks.

Contact us

Download my tax return

Sample view from the GetCTC Tool. We strongly recommend clients download and save a copy of their accepted return for their records

Clients can track the status of their after 24 hours at [Where's My Refund](#).

Rejected Returns

If a client's return is rejected by the IRS they will receive a notification via text or email. They'll need to log back into the tool using their phone or email to learn the reason for the reject and resolve the issue.

Sample rejected return email notification



Attention needed to submit your your taxes with GetCTC

Hello Honey,

Thank you for filing your taxes with GetCTC! We need to correct some of your tax information in order to submit your tax return to the IRS.

Sign in here <https://ctc.demo.getyourrefund.org/en/portal/login> to see next steps for correcting your tax information.

We're here to help!
Your tax team at GetCTC.org

Thank you for filing with GetCTC!

Current tax return status:

 Submission error

Reason for this rejection:

USPS-2147219401
Address Not Found.

Next steps:

Please send us a message with questions or corrections using the "Contact Us" button below.

[Correct my information](#)

[Contact us](#)

[Download my tax return](#)

This page will provide the reject code, a brief explanation about the reject, and next steps.

Clients will need to select "Correct my information" to make edits to their return and resubmit.

In some cases, clients may be asked to upload a picture of their ID if our analytics suggest there is a risk of identity theft.

Note, some reject reasons cannot be resolved electronically. For example, a return will reject if the IRS has already received another tax return with the same SSN or ITIN. If the SSN is correct, the client may need to take steps outside of the simplified filing tool.

Read more about common rejects and how to resolve them at [GetCTC.org/navigators](https://getctc.org/navigators)

Changes to the Tool and Reporting Feedback

At Code for America, we embrace an iterative technology development process that means that the tool will continue to be refined in the days, weeks, and months following launch to make it even easier to use.

We rely on community partners to help elevate challenges or barriers their clients face. If you notice recurring issues or themes, we encourage you to let us know by emailing our team at Navigators@GetYourRefund.org or complete this form.

Please note that we will not be able to respond to all feedback requests.

Thanks for your help!

**Please stay connected and look for other resources
on our Navigator Resource Page:**

[GetCTC.org/navigators](https://www.getctc.org/navigators)