Outreach Partnerships with GetYourRefund.org

Help Families in Your Community Access the Child Tax Credit and other Tax Benefits.

CODE *for* AMERICA

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Overview

- Families with low income could get as much as $20,000 from filing a tax return this year. As you know, cash support is critical right now to help families provide for their basic needs.
- Several free tax filing services for families with low income are available starting January 31 at GetYourRefund.org—Code for America's online, mobile-friendly application connecting tax filers with free, IRS-certified tax help.
- [Simplified filing](#)—akin to last year's GetCTC tool—will be available in April or May.
- Our research has shown that state and local governments—and public benefits agencies—are the best possible messengers to get the word out about tax benefits.
- We recommend putting a GetYourRefund banner ad on your website and sending several messages via text or email encouraging your clients or members to claim their benefits via GetYourRefund.org.

Why encourage families to file taxes?

The expanded Child Tax Credit (CTC), delivered monthly to families from July to December of 2021, has helped [nearly 40 million families](#) pay for their most urgent needs. These monthly payments were advances, totaling one half of the 2021 CTC. In order for families to receive the second half of their 2021 CTC—or the full amount if they did not receive monthly payments last year—they will need to file a 2021 tax return this year. Filing taxes will also help some families get the Earned Income Tax Credit (EITC), the Child and Dependent Care Credit (CDCC), and the third Economic Impact Payment (EIP, also known as the stimulus check). These credits—which could total nearly $20,000 for some families with low income—**[are all on the line, even without Build Back Better](#)**.

Unfortunately, many of the families with low income who are most in need of these benefits are missing out. Millions of families who don't traditionally file taxes need help connecting with free, trustworthy, clarifying, and accessible services to file a return and claim the tax benefits that belong to them. **A small outreach push from you could generate millions of dollars for families**, funds that also provide a significant, immediate boost to local economies.

What about simplified filing and GetCTC.org?

Last year, GetCTC.org and the IRS Non-Filer Tool provided a simplified filing option for families who are not required to file taxes. This year, simplified filing will again be available to claim the second half of the CTC—but not until April or May[1]. **If families want to claim their CTC immediately, they will need to file a full return.** Fortunately, filing a full return also gives families access to additional benefits like the EITC, which can be significant. While the simplified process is much easier (it usually takes 10-15 minutes, whereas a full return can take hours or even weeks), it may not allow families to claim all the credits available to them. See Appendix A and Appendix B for more details on which benefits can be claimed via simplified filing vs. a full return.

What services are available at GetYourRefund.org to help clients file?

GetYourRefund.org will be Code for America's main landing page for all clients for the 2022 tax season. Available service options include:

- **File Myself** (Free DIY Tax Software): GetYourRefund refers clients to TaxSlayer free tax filing software that they can use to prepare their own federal and state returns. Clients can use GetYourRefund chat support to get help completing their return. This service is also known as Facilitated Self Assistance or FSA, and it is the same process that MyFreeTaxes.com offers. This option is available to families making less than $73,000 a year. Most clients will be referred to "File Myself," since it has broad eligibility and can handle significant capacity.

- **GetYourRefund** (Full-service virtual assistance by Volunteer Income Tax Assistance (VITA) partners): Clients provide basic information and upload pictures of their ID and tax documents—a VITA intake. GetYourRefund then remotely pairs clients with a VITA program to complete the process of filing a state and federal return. This option is available to families making less than $66,000 a year. However, due to limits on volunteer capacity for this service, our GetYourRefund triage process prioritizes this service for new filers and those with lower incomes.

- **VITA Site Location Finder:** Clients looking for in-person assistance will be directed to our mobile-friendly VITA site location finder. The GetYourRefund team pulls VITA site information directly from the IRS VITA site locator tool and uses it to update our location finder on a weekly basis.

- **GetCTC** (Simplified Filing): If a client is a good candidate for simplified filing and is unable to (or does not want to) file a full return, we will offer them the opportunity to sign up for a text and email as soon as the GetCTC service is available. This option is only available to families with no filing obligation (income <$12,550 single / $25,100 married; <$400 self-employment income). Most likely, GetCTC will provide access only to the CTC and any missing third stimulus payment (EIP3).

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[1] 2022 simplified filing rules, released in late January, do not allow simplified filing before April 19. Code for America is working now on updating our software based on the new rules, and we plan to have it ready in April or May.

When clients arrive at GetYourRefund.org, they will be asked a short series of questions to determine which of our free filing services they should use. As always, our client support chat will be open to address additional tax benefits related questions. All services provided on GetYourRefund.org are completely free of charge and have received IRS approval; they are also currently linked from the White House's CTC information page at www.ChildTaxCredit.gov.

What type of outreach do you recommend—and when?

We recommend waiting until simplified filing is available in April or May to do extensive outreach to new and lapsed filers[2], who may struggle with a full return. Outreach to an audience with generally low or middle income, pointing to GetYourRefund, can start now. For detailed information about outreach best practices to new or lapsed filers, please read our report: **Lessons from Simplified Filing in 2021**. For most outreach partners, especially government agencies or large membership organizations, below are the most effective steps you can take to reach new and lapsed filers. We recommend that you **request a unique URL** when conducting this outreach so that we can provide you with aggregate data on your clients' outcomes.

- **Add the unique URL link or a banner ad on your website, especially if you can place it within a public benefits application webpage.**

- **Email, text, or call clients or members to let them know about GetYourRefund. Based on our research in 2021, we recommend sending a series of messages, rather than just one.**

  ○ General audience with low income: messages in early February and early April, pointing to GetYourRefund.org

  ○ New / lapsed filer outreach: messages in early May and early October, pointing to GetCTC.org (which will be available starting in May, until at least mid-October)

- See this **toolkit from our partners at GMMB and CBPP for graphics and sample language**.

Households facing particularly high barriers to filing a tax return (such as language or technology barriers, homelessness, or incarceration) may benefit from additional support completing this process from navigators. For more information about our navigator program, please visit **www.GetCTC.org/Navigators**.

Who are we trying to reach?

An estimated 4 million families across the country are eligible for and have not yet received the CTC. Here's what we know about them:

- Unserved families are in every city and every state. There is no single geographic area where they are clustered.
- Many unserved families receive other government benefits—like food stamps, Social Security, or state/local cash assistance—and are clustered in higher-poverty areas.

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[2] Lapsed filer is defined as an individual who has not filed in at least one of the last three years.

- Unserved families are disproportionately likely to be people of color—and very disproportionately likely to be undocumented immigrants. Some evidence suggests they are disproportionately likely to be Spanish speakers.

- Many unserved families have not filed taxes because they think taxes *aren't for them*—that they can't, or shouldn't, file a tax return, usually because they earn little or no money or receive certain federal benefits. They need reassurance that this process is right for them—and that they can do it.

What data can you share with me about the families I refer to GetYourRefund?

- We encourage all of our outreach partners to **request a unique URL** (e.g., GetYourRefund.org/youragency), which will allow us to report basic outcome metrics (home page visits, returns started, returns accepted over time, estimated dollars delivered, etc.) for families accessing GetYourRefund via that URL. Metrics are viewable on an online partner dashboard. You can also view outcome metrics by zip code or collection of zip codes.

- If you utilized a unique URL on GetCTC.org in 2021, you can use that same one on GetYourRefund.org (for example, if you used www.GetCTC.org/yoururl, you can now use www.GetYourRefund.org/yoururl). If you did not request a unique URL last year and would like to track your GYR referrals this year, please complete **this form**. You can request as many unique urls as you like so that you can easily run outreach experiments. (For example, you could send clients to GetYourRefund.org/yoururl1 via email and to GetYourRefund.org/yoururl2 via text message, and compare their performance.)

- If you are interested in collaborating with Code for America on an outreach experiment, please send a brief description of the experiment to Associate Program Director Annelise Grimm **annelise@codeforamerica.org** and our Data Scientist Max Hell at **mhell@codeforamerica.org**. We will respond to your request as soon as we are able. In general, we can only share aggregate data at the custom URL or zip code level; we cannot generally share individual-level data.

Additional questions and marketing / communications plans?

If you have any additional questions, or substantive plans for broader marketing and communications that highlight GetYourRefund (or Code for America generally), please reach out to Associate Program Director Annelise Grimm annelise@codeforamerica.org.

For more information about Code for America, visit: codeforamerica.org

Appendix A: Services Available at GetYourRefund.org in 2022

	GetYourRefund *Full Service, Virtual VITA* File for multiple years with assistance.	**File Myself** *Facilitated Self Assistance / DIY* File quickly online on your own for 2021.	**GetCTC** *Simplified Filing, Express* File quickly on your own to collect your stimulus payments and Child Tax Credit.	**VITA Site Location Finder** *In-person VITA* Find a site near you for in-person help.
Launch date and capacity	● Launches 1/31/22 ● Limited capacity	● Launches 1/31/22 ● Unlimited capacity	● Launches May ● Unlimited capacity	● Launch dates vary. ● Capacity varies.
Household income limit	under $66,000	Under $73,000	Under $12,500 ($25,000 if filing jointly)	Typically under $58,000
Filing years	2021-2018	2021	2021	2021-2018
Credits and payments	CTC, Any Stimulus, EITC, State Credits	CTC, Stimulus 3, EITC, State Credits	CTC, Stimulus 3	CTC, Any Stimulus, EITC, State Credits
Required information	Photos of IDs (Social Security and ITIN paperwork) Photos of tax documents (w2s, 1099s, etc.)	Social Security or ITIN numbers Tax documents (w2s, 1099s, etc.)	Social Security or ITIN numbers	Paper copies of IDs (social security and ITIN paperwork) Tax documents (w2s, 1099s, etc.)
Length of time to file *IRS payment processing times vary 3-6 weeks*	2-3 weeks (includes 2 phone calls with a VITA volunteer)	45 minutes	15 minutes	Depends on location
Other Considerations	● IRS-certified VITA tax team ● ITIN application assistance ● Accessing required documents can be a major barrier for clients.	● IRS-certified chat support available ● Software is formatted for smartphones, but we highly recommend computers or tablets.	● Waiting for simplified filing may not be a good option for households at risk of having their dependent claimed by someone else.	● IRS-certified VITA tax team ● ITIN application assistance (sometimes)

Appendix B: Tax Benefits Available in 2022: Summary

Benefit	Amount	Get it via simplified filing?	Get it via traditional full filing?	Notes
Remaining amount of 2021 CTC	$3,600 per young child, or $3,000 per older child, minus whatever the taxpayer received in AdvCTC payments July-Dec 2021.	Yes	Yes	If the advance payments went to a different household last year, the advance payments to this taxpayer were $0. Families need to look up how much they received in advance payments, based on their own records, using IRS online tools, or from IRS Letter 6419.
Remaining amount of EIP3	$1,400 per household member, *minus* whatever the taxpayer received in March 2021.	Yes	Yes	Families likely need to look up how much they received in automatic payments, based on their own records, using IRS online tools, or from IRS Letters 1444-C or 6475.
EITC	Up to $3,618 with 1 child, $5,980 with 2 children, $6,728 with 3+ children. Up to $1,500 with no children	Unlikely (federal only)	Yes	The American Rescue Plan Act (ARPA) tripled the childless maximum credit amount and significantly expanded eligibility. In 28 states, there is also a supplemental state EITC, which will not be available through simplified filing.
Child and Dependent Care Credit	Half the cost spent on child care that allowed taxpayers to work or look for work, up to $4,000 for one child or $8,000 for two or more children.	No	Yes	ARPA made this credit fully refundable, so even families with very low incomes can receive it. Filers must provide the Employer Identification Number or Social Security Number of their child care provider.
Withheld taxes	Depends on earnings and withholding	No	Yes	Any tax withheld from paychecks in excess of tax owed
State tax benefits	Depends on state	No	Yes	State EITCs or other credits