

How to Host a File Myself Support Site

Navigator guide from Code for America
Learn more at [GetCTC.org/navigators](https://getctc.org/navigators)



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In this guide, you'll learn about the:



- Benefits of filing a full tax return
- Barriers to filing
- Role of Community Navigators
- File Myself service at [GetYourRefund.org](https://www.getyourrefund.org)
- How support sites can help
- Operating recommendations
- Additional resources

Benefits of filing a full tax return

- ❖ The IRS is the largest anti-poverty benefits administrator in the country. They administer the following benefits:
 - Child Tax Credit
 - Earned Income Tax Credit
 - Child and Dependent Care Credit
 - Economic Impact Payments (commonly known as Stimulus payments)
- ❖ But, every year, low-income families leave billions of dollars in IRS benefits unclaimed. **\$10.5B of EITC** left on the table every year, largely by non-filers
- ❖ **4 Million families** are at risk of missing out

Barriers to filing and claiming credits

- ❖ Awareness
 - They don't think they have to file their taxes
 - They may not understand that there are cash benefits to filing taxes
- ❖ Access to help
 - Trustworthy, affordable help is hard to find and help isn't always available where they are, when they need it
 - Volunteer Income Tax Assistance (VITA) sites provide a high quality service but are limited by the number of clients they can serve
- ❖ Access to technology
 - Low-to moderate-income households may not have access to a computer, or reliable internet
- ❖ Anxiety and Fear
 - They are overwhelmed by trying to understand the ambiguous consequences of filing



Community Navigators

Why Navigators?

- **Outreach alone isn't enough to solve these problems;** many families don't know how to access these benefits and need guidance doing so
- **Trusted navigators with access to the right resources can make a huge difference**

What are Navigators?


- Navigators are trusted, community-based guides that help marginalized households:
 - Build trust in products and benefits
 - Access and utilize digital tools to access their tax benefits.
 - Provide technical support
 - Refer tax-related issues and questions to appropriate organizations
- Navigators do not need to be tax experts to help individuals access their benefits

One critical service navigators can provide is setting up a **File Myself** support site

Trusted community organizations with computer labs are well positioned to make a big difference in their communities by hosting file myself support sites

What is File Myself?

- ❖ File Myself is one of four free tax service options at GetYourRefund.org
 - See a comparison chart of services near the end of this guide
- ❖ When clients choose File Myself, they are referred to free tax software, using a specialized link to guarantee the service remains free
- ❖ Clients prepare their own taxes to claim all eligible federal and state benefits
- ❖ They can reach out to the GetYourRefund team via chat or email if they have questions or get stuck
- ❖ See additional considerations in the chart to the right

 <i>VITA-certified chat Support available!</i>	File Myself <i>Facilitated Self Assistance/DIY</i> File quickly online on your own for 2021
Launch date and capacity	<ul style="list-style-type: none"> • Launches 1/31/22 • Unlimited capacity
Household income limit	Under \$73,000
Filing years	2021
Credits and payments	CTC, Stimulus 3, EITC, State Credits
Required information	Social Security or ITIN numbers Tax documents
Length of time to file <i>IRS payment processing times vary 3-6 weeks</i>	45 minutes
Other Considerations	<ul style="list-style-type: none"> • IRS-certified chat support available • Software is formatted for smartphones but computers or tablets are highly recommended

File Myself Support Site

Why does GetYourRefund promote File Myself?

- The software allows clients to claim all eligible federal and state credits
- Low-income households typically have simple tax returns and the process of filing can be relatively simple and take less than an hour to prepare
- There are no capacity restrictions. Most other free resources are limited by their capacity and location. This software is available to anyone who makes less than \$73k anywhere in the United States.

Why is there a need for File Myself Support Sites?

- Awareness: There are countless “free” tax software options promoted to low-income households but they rarely stay free and may promote harmful products. Support sites can help promote a truly free product.
- Computer access: The tax software can be completed on a smartphone but computers are strongly recommended. Support sites can help them access a computer and reliable internet.
- Referral to tax experts: Some clients may be worried about filing their own tax return or run into questions while preparing their taxes. A support site can share resources like the File Myself guide and the GetYourRefund client success team who can help answer tax and software questions.

File Myself Support Site Recommendations

The next few pages will share ideas and recommendations of how a community organization can set up a File Myself Support Site.

Organizations can choose which level of support they're prepared to offer and what would be most helpful to their clients.

Recommendations

Computer Access

Designate computers for File Myself use

- Post signs and information to let clients know that they have the opportunity to file at your location
- Bookmark [GetYourRefund.org/diy](https://getyourrefund.org/diy) on computers so the software is easily accessible
- Consider extending computer time restrictions. Computer labs with time restrictions should consider extending the allotted time to make sure clients feel they have enough time to complete the process.
- Provide some space between the designated computers so clients feel comfortable typing in sensitive information
- Encourage clients to use an incognito or private browser to ensure they don't accidentally save their login information
- Allow them to print their completed tax return to save for their records

Recommendations

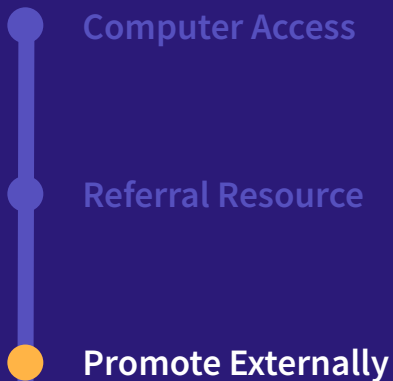
Computer Access

Referral Resource

Support sites are NOT expected to answer tax-related questions, in fact, they cannot provide this assistance without further training and certification. Instead, we hope that partners will help refer client to the following resources to make the process as easy as possible

- Share File Myself Guides with clients
 - File Myself Guide
 - File Myself Guide for “non-filers” to claim Child Tax Credit and 3rd stimulus
- GetYourRefund Client Support can help answer tax and software questions. Client success can be reached using:
 - Chat feature at [GetYourRefund.org](https://www.getyourrefund.org) or
 - Email using the “Help & Support” option in the tax software.

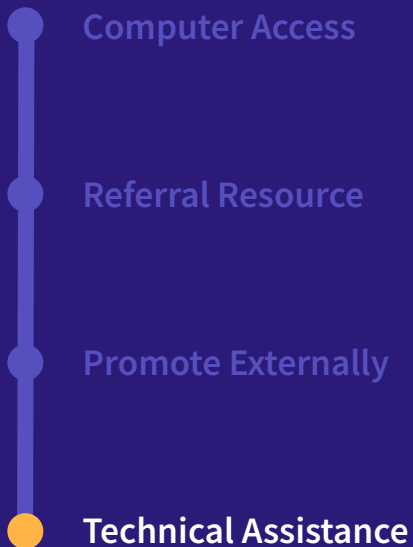
Recommendations



Promote your support site to external partners and clients:

- Let partners know about your site and ask for their help promoting the service to their clients.
- Send direct communication to clients via text, newsletters, and social media posts.
- Use and modify curated content available in the following toolkits:
 - [Social Press Kit](#)
 - [Get It Back Campaign](#)


Recommendations




If possible, recruit volunteers or staff to help provide technical assistance

- Interested individuals should review this guide and other GetYourRefund File Myself resources
- Assistance could include helping clients:
 - Understand the File Myself service and encouraging them to give it a try
 - Create an account (usually the hardest part)
 - Use a File Myself guide
 - Contacting GetYourRefund Client Success team for tax related questions
 - Print their completed tax return

Recommendations

- 
- Computer Access
 - Referral Resource
 - Promote Externally
 - Technical Assistance
 - Referral to Alternative Options**

Unfortunately, some clients will not be able to complete the File Myself process. Support Sites can help clients understand their other options and provide a warm handoff to those services. The next page will provide a description of all GetYourRefund's free services.

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

Getting Started

None of the assistance mentioned *requires* certification or training

- Decide which types of assistance you want to offer - you can add more as needed!
- Sign up for GYR Navigator Updates [here](#) or at GetCTC.org/navigators
 - There, you can also request a Unique URL to track the number of clients served through GetYourRefund.org
- Know what you can and can't do:
 - Can: Provide access online tools and build trust/reassurance in process
 - Cannot: Provide tax advice (without additional training and certification)
- Familiarize yourself with available resources
 - GYR Navigator Resources/Modules
 - GetYourRefund Chat
 - Local VITA programs, LITCs, existing outreach programs
- Dive in!



Additional Navigator Resources at [GetCTC.org/navigators](https://getctc.org/navigators)

Learn about other ways you can support your community in accessing valuable tax credits at [GetCTC.org/navigators](https://getctc.org/navigators).

- Recorded Navigator Training
- Outreach Partnership Guide
- GetCTC 2021 Summary Report
- GetCTC 2022 Guide (coming soon)
- Helpful Handouts

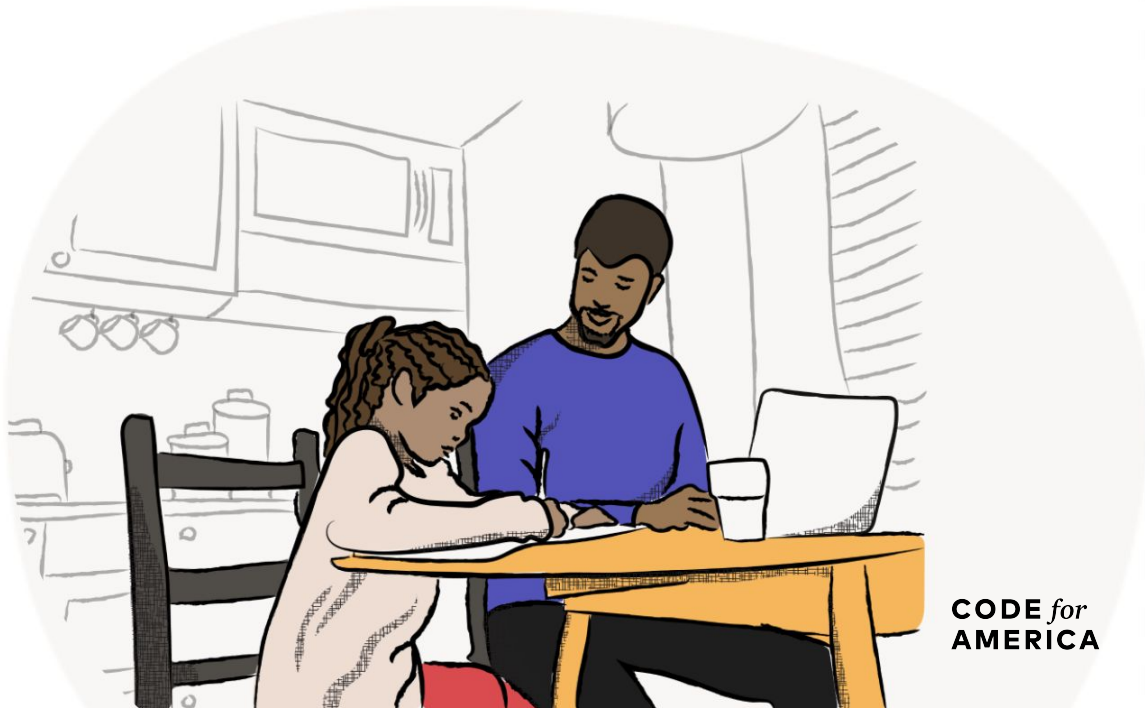
Thank you!

Email us at Navigators@getyourrefund.org

Visit us at getctc.org/navigators

Promoting economic justice through tax benefits

This guide — and the resources at GetCTC — were created by Code for America. Code for America is a nonprofit organization that partners with government to strengthen the delivery of public services through human-centered technology.



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