

Helping Consumers Claim Their Federal

ECONOMIC IMPACT PAYMENT



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ELIGIBILITY OVERVIEW

EIP Eligibility Qualifications:

- ✓ You are a U.S. Citizen or a U.S Resident Alien
- ✓ You have a valid Social Security Number; and
- ✓ You are not being claimed as a dependent on another Taxpayers 2019 or 2018 Tax Return

How much will I receive?

- ✓ \$1,200- Single or Married filing separate taxpayers whose adjusted gross income (AGI) was \$75,000.00 or below in Tax Year 2019 (or 2018 Tax Return if you have not filed a 2019 Tax Return). Head of Household filers should also expect to receive the same amount if their AGI was \$112,000.00 or below in Tax Year 2019 (or 2018 if you have not filed a 2019 Tax Return).
- ✓ \$2,400.00- Married Filing Joint taxpayers will receive the full \$2,400.00 if their combined AGI was \$150,000.00 or below in Tax Year 2019 (or 2018 if you have not filed a 2019 Tax Return).
- ✓ \$500.00- In addition to the above amounts, eligible taxpayers will receive up to \$500.00 for each qualifying child under the age of 17.

ELIGIBILITY OVERVIEW

The Following persons are ineligible to receive an EIP:

1. You do not have any qualifying children and you are considered a high- income filer.
2. Persons claimed as dependents on another person's tax return.
3. ITIN Holders or persons who do not have a Social Security number that is valid for employment.
4. Non-resident aliens.
5. Persons who have a valid SSN, but their spouse does not, and they filed jointly on their 2019 Tax Return (or 2018 Tax Return if they have not filed 2019).
6. You filed Form 1040-NR or Form 1040 NR-EZ, Form 1040- PR or Form 1040-SS for Tax year 2019 (or 2018 if you have not filed 2019).
7. You are an incarcerated Individual.
8. You are a deceased individual.
9. You are an Estate or Trust.

Military Exception: A married couple is eligible if at least one spouse was in the military and at least one spouse has a valid social security number.

ELIGIBILITY OVERVIEW

Automatic Payments:

You will receive an automatic payment (either to your bank account on file or by mail) if you are an:

1. Eligible Taxpayer(s) who filed a 2019 tax return (or 2018, if a 2019 tax return has not been filed)
2. Eligible retirees and recipients of Social Security retirement, survivor, or disability benefits (SSDI), railroad retirement benefits, supplemental security income (SSI) and VA compensation and pension (C&P), who do not normally file a tax return, will receive an automatic payment.

Non-Filer Portal: Navigating the non-filer portal

Please use the non-filer portal if:

You have little or no income requiring you to file a 2019 or 2018 tax return, you don't receive any of the federal benefits listed above, or do not qualify for any kind of tax credit(s) you may use the non-filer portal in order to claim your EIP. (more on this in the next couple slides)

Non-Filer Tool: You will need the following information 1) Full name, current mailing address and an e-mail; 2) Date of birth and valid SSN; 3) Bank account number, type and routing number if you have one; 4) Identity Protection Personal Identification Number (IP PIN) if you have one; 5) Drivers license or state-issued ID if you have one; 5) for each qualifying child during 2019: name, social security number or adoption taxpayer identification number and their relationship to you or your spouse.

NEW DEADLINES



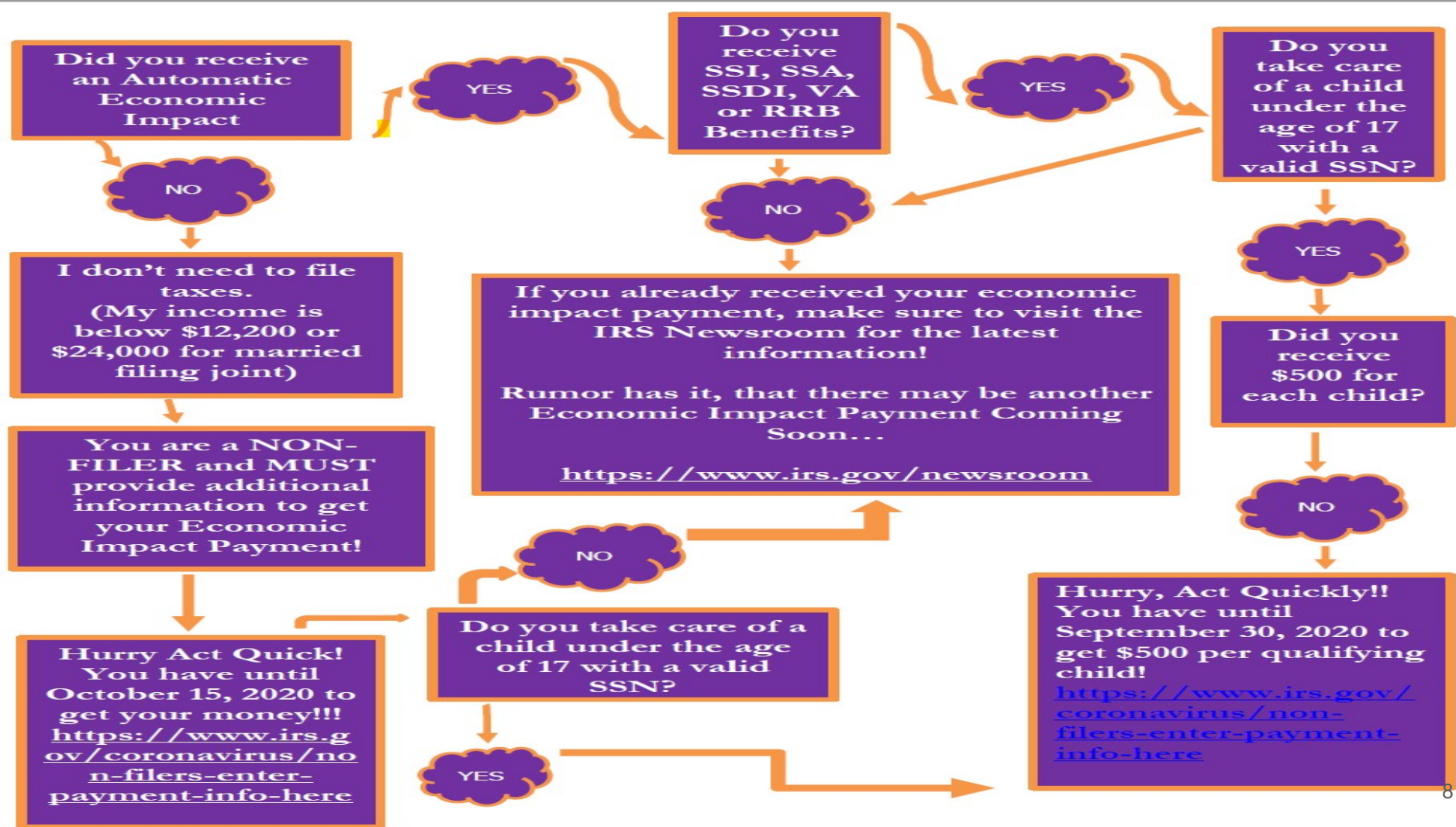
SEPTEMBER 30, 2020

If you receive Social Security (retirement, survivors, disability) or Supplemental Security Income (SSI), and you did not file a tax return in 2019 or 2018, and you **have a qualifying child under 17**, you have until **September 30, 2020** to enter information in the IRS' Non-Filer Tool in order to get a \$500 EIP for your child.



OCTOBER 15, 2020

If you are a qualified taxpayer, have little to no income, did not file a 2019 or 2018 tax return and do not qualify for any kind of tax credit(s) and have not used the non-filer portal, you have until **October 15, 2020** to enter information in the IRS' Non-Filer Tool in order to receive the EIP before the end of the year. Anyone who misses the deadline will have to wait until next year and claim it as a credit on their 2020 Federal Income Tax Return.



NEW DEADLINES

Letter 1444-A:

NINE MILLION! is the approximate number of eligible taxpayers who have not yet received an EIP. In response, the IRS is preparing to send letters out that will urge taxpayers to register by **October 15, 2020**, by using the non-filer portal (see resources).



If you are eligible to receive a tax credit like the EITC or CTC or any other credits, you **MUST** file a 2019 Tax Return. You **CANNOT** use the Non-Filer Portal.

HELPING NON-FILERS WITH LIMITED ACCESS TO TECHNOLOGY

Taxpayers with limited access to computers or smart phones may not be able to complete the non-filer application on their own, or there may be problems with the application site working on smart phones. If available, assist the client with completing the application virtually using zoom screen share or other similar tool. (See resources page).

Note: Do not continue with application if any of these apply:

- Client has already filed a 2019 federal income tax return.
- Client's 2019 gross income exceeded \$12,200 (\$24,400 for a married couple) or other reasons require you to file a 2019 federal tax return.
- Client was married at the end of 2019 and is not submitting information here with their spouse.
- Client was not a U.S. citizen, permanent resident or qualifying resident alien in 2019.

Prior to accessing the application, an account must be generated. The client will need to provide:

- Email address
- User ID
- Password
- Phone number is not necessary but is recommended

HELPING NON-FILERS WITH LIMITED ACCESS TO TECHNOLOGY

If you do not have the capacity to help taxpayers fill out the non-filer form, direct them to a partner organization who can help and or share the following available resources:

Volunteer Income Tax Assistance (VITA): VITA sites are located across the country and provide free tax help to taxpayers who qualify. Due to the pandemic, most of these sites have been shut down or have moved to a virtual setting. You can direct taxpayers to a local VITA by using the following link:

<https://irs.treasury.gov/freetaxprep/>

United Way's 211 EIP Helpline: This EIP helpline provides over-the-phone assistance. Specialized agents can help callers confirm their eligibility, learn how to claim their EIP, **fill out the IRS Non-Filer form**, and answer specific EIP questions. Callers are **also screened for tax credit eligibility** and referred to free tax services as needed. They can be reached at: 1-844-322-3639 or

<https://www.unitedway.org/find-your-united-way/>

COMMON QUESTIONS & ISSUES

How will I know if the IRS has sent me my EIP?

Should I use the non-filer portal?

What options do survivors (or current) domestic violence victims have, if their abuser prevented them from receiving their EIP?

How do EIP payments affect federal benefit programs like SNAP, Medicaid or TANF?

I received a payment for a person who is incarcerated. Do I have to return it?

COMMON QUESTIONS & ISSUES

Can creditors garnish your EIP payment for past due debt?

What if someone has moved or doesn't have a permanent address?

I received a prepaid debit card in the mail and never filed a tax return, but I do qualify for federal benefits. Is this the EIP?

I recently filed a 2019 Tax Return, or I used the Non-Filer portal, where can I check the status of my payment?
(see resources Get My Payment)

What if someone filed their taxes with a refund anticipation check (RAC) or Refund Anticipation Loan (RAL)?

COMMON QUESTIONS & ISSUES

What If my EIP was lost, stolen or destroyed?

What if I received the pre-paid debit card from the IRS and threw it away on accident?

RESOURCES

Non-filer Application Information: <https://www.irs.gov/coronavirus/non-filers-enter-payment-info-here>

Get My Payment – EIP Status : <https://www.irs.gov/coronavirus/get-my-payment>

Letter 1444-A: www.irs.gov/pub/irs-pdf/n1444aes.pdf

Get your refund: <https://www.getyourrefund.org/?s=CBPP> get help filing your tax return for FREE with IRS certified VITA sites.

RESOURCES

Outreach Tips to Connect People Experiencing Homelessness to Stimulus Payments:

<https://www.eitcoutreach.org/blog/outreach-tips-to-connect-people-experiencing-homelessness-to-stimulus-payments/>

Tax Tips for Survivors of Domestic Violence: <https://www.eitcoutreach.org/blog/tax-tips-for-survivors-of-domestic-violence/>

Figuring out Filing Status: <https://www.irs.gov/help/ita/what-is-my-filing-status>

EIP Hotline: 1-800-919-9835

Find a local Taxpayer Advocate: <https://taxpayeradvocate.irs.gov/contact-us>

Find a local Low- Income Tax Clinic: <https://www.irs.gov/advocate/low-income-taxpayer-clinics>

RESOURCES

Information on requesting a local payment trace: <https://www.irs.gov/newsroom/economic-impact-payment-information-center-payment-issued-but-lost-stolen-destroyed-or-not-received>

Economic Impact Payment Information Center: <https://www.irs.gov/coronavirus/economic-impact-payment-information-center>

Bet Tzedek Legal Resources: <https://www.bettzedek.org/our-services/resources/>

Q&A