

# **REAL ECONOMIC IMPACT NETWORK**

## **TAX TIME UPDATES**

**January 11, 2017**  
**Washington, DC**

# Moderator



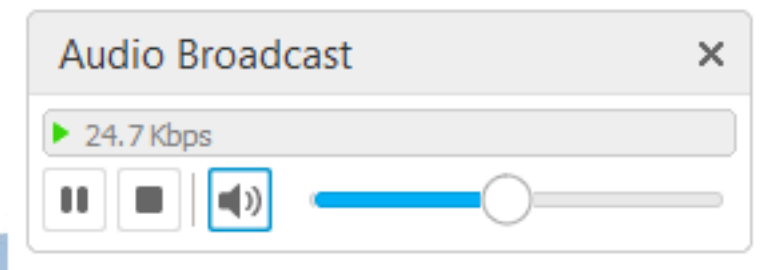
*Michael R. Roush, M.A.*  
**Director, Real Economic  
Impact Network**  
**National Disability Institute**

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***Please note:*** This webinar is being recorded and the materials will be placed on the National Disability Institute website at [www.realeconomicimpact.org](http://www.realeconomicimpact.org)

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# National Disability Institute

The mission of National Disability Institute is to drive social impact to build a better economic future for people with disabilities and their families.



## NDI's Real Economic Impact Network

- An alliance of organizations & individuals dedicated to advancing the economic empowerment of people with disabilities.
- Consists of more than 4,500 members located throughout the United States.
- Includes non-profits, community tax coalitions, asset development organizations, financial education initiatives, corporations & private-sector businesses, federal/state/local governments & agencies, and individuals & families with disabilities.
- All partners join forces to embrace, promote & pursue access to & inclusion of people with disabilities in the economic mainstream.

**Learn more about the REI Network at**  
**[www.realeconomicimpact.org/REI-Network.aspx](http://www.realeconomicimpact.org/REI-Network.aspx)**

# Presenter



**Don Dill**

*Senior Tax Analyst*

**Stakeholder Partnerships,**

**Education and**

**Communication (SPEC)**

**Internal Revenue Service**



# 2017 Filing Season Update

## Important Dates

- **Monday, January 23<sup>rd</sup>**
  - First Day e-filed returns accepted by the IRS
- **Friday, January 27<sup>th</sup>**
  - National EITC Awareness Day
- **Wednesday, February 15<sup>th</sup>**
  - Refunds which include Earned Income Tax Credit and Advanced Child Tax Credit Start to be issued
- **Tuesday, April 18<sup>th</sup>**
  - Last Day of 2017 Filing Season



# 2017 Filing Season Update

## Refund Delay

- 2015 PATH Act requires IRS to hold refunds claiming the Earned Income Tax Credit (EITC) and the Advanced Child Tax Credit (ACTC) until February 15<sup>th</sup>
  - PATH Act requires additional time to help prevent revenue lost due to Identity Theft and refund fraud due to fabricated wages and withholding
    - Employers now required to submit W-2's and Form 1099-Miscellaneous to IRS by 1/31
      - Previously due to IRS by 2/28



# 2017 Filing Season Update

## Refund Delay

- Important Reminders for Taxpayers
  - IRS required to hold entire refund until Feb 15<sup>th</sup>
    - No partial release of refund not associated with EITC or ACTC
  - Taxpayers should file as they normally do in other filing season
    - IRS will accept and process returns with EITC and ACTC upon receipt
  - Refund delay will impact ALL returns filed with EITC and ACTC
    - Paid preparers are equally impacted by the refund delay



# 2017 Filing Season Update

## Refund Delay

- IRS Launches “Get Ready” Campaign to Help Inform and Educate Taxpayers about Refund Delays and Other 2017 Changes
  - [www.IRS.Gov/GetReady](http://www.IRS.Gov/GetReady)
  - Site provides information to help get the word out
    - News Releases
    - Tax Tips
    - Social Media
      - Tweets
    - Presentation and Outreach Materials



# 2017 Filing Season Update

## Refund Delay

- Multiple national organizations working in the free tax preparation arena are providing materials to help inform and educate taxpayers about refund delay
  - Center on Budget and Policy Priorities
  - National Consumer League
    - [www.vit toolkit.org](http://www.vit toolkit.org)
  - Taxpayer Opportunity Network
    - [https://cfed.org/programs/taxpayer\\_opportunity\\_net\\_work](https://cfed.org/programs/taxpayer_opportunity_net_work)
  - Consumer Financial Protection Board
    - <http://www.consumerfinance.gov/about-us/blog/some-people-may-experience-refund-delays-tax-season/>





# 2017 Filing Season Update

## ITIN Renewals

- The 2015 PATH Act implemented a series of changes impacting Individual Taxpayer Identification Numbers (ITINs)
  - ITINs are used for tax filing and payment obligations
- Many ITINs will expire on January 1<sup>st</sup>, 2017
  - ITINs not used on a tax return at least once in the past three filing season; and
  - ITIN's with middle digits of 78 or 79 (9NN-78-NNNN)
- Additionally, ITIN's issued prior to 2013 will expire over the next few years
  - But these ITINs can be renewed prior to expiration



# 2017 Filing Season Update

## ITIN Renewals

- The ITIN Renewal Process includes the submission of a Form W-7, Application for IRS Individual Taxpayer Identification Number
  - Need to utilize latest version, dated Sept 2016
  - Check box that states “Renew an existing ITIN”
  - Include original supporting and required identification documentation or certified copies
    - Note: only a passport with US entry date is now acceptable as stand-alone documentation for dependents
- Failure to renew ITIN prior to filing a tax return will result in a refund delay and possible loss of eligibility for some benefits



# 2017 Filing Season Update

## ITIN Renewals

- Individuals can receive additional information on the ITIN renewal process:
  - [www.IRS.Gov/ITIN](http://www.IRS.Gov/ITIN)
  - [www.IRS.Gov/GetReady](http://www.IRS.Gov/GetReady)
  - Certified Acceptance Agents and Acceptance Agents
    - Submit W-7 on behalf of individuals
    - CAA's can verify documents such as passports and birth certificates
    - Listing on [www.IRS.Gov/ITIN](http://www.IRS.Gov/ITIN)
  - IRS Taxpayer Assistance Centers
    - Designated Centers will assist with W-7 completion
    - Appointments REQUIRED (844-545-5640)



# 2017 Filing Season Update

## Additional IRS Resources

- “Get Transcript”
  - Online access to IRS transcripts that provide summary information on taxpayer’s filing history, account history, wage history, etc.
  - Stringent authentication process utilized to protect taxpayer’s data and identity
- “Where’s My Refund”
  - Online check of refund status, including payment date
- “Finding Out How Much You Owe” (new)
  - Online access for balance inquiries, coupled with online payment options
  - <https://www.irs.gov/payments/finding-out-how-much-you-owe>

# Presenter



*Janne Huang*

*Outreach Associate*

**Center on Budget and Policy  
Priorities**

# Connecting Workers to the EITC

**Janne Huang**

**Center on Budget & Policy Priorities**

January 11, 2017



Tax Credits  
for People  
Who Work

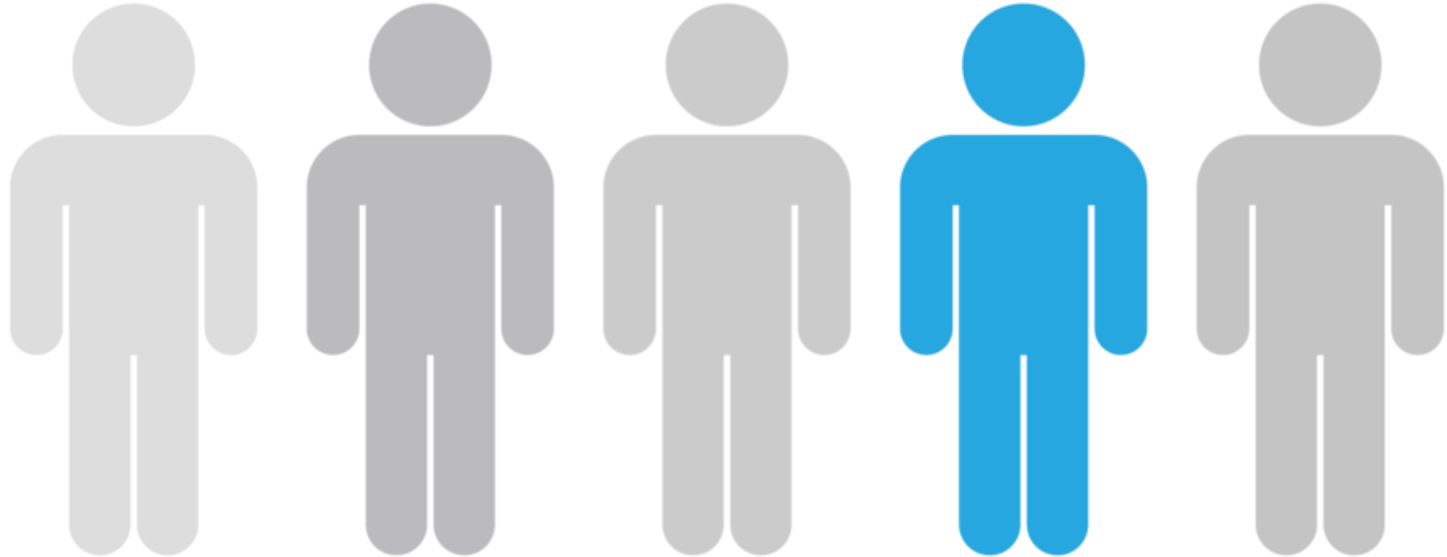
# The Get It Back Campaign

- National effort to connect eligible workers to tax benefits
- Promote the **Earned Income Tax Credit**, the **Child Tax Credit**, **free tax preparation**, and other tax benefits
- Work with a network of diverse partners
- Provide outreach tools, trainings, and resources to help you link eligible workers to the tax credits and free tax help



# Why?

- **1 in 5 eligible workers** doesn't claim the tax credits they've earned
- This money lifts **7 million families out of poverty**, keeps children healthy, improves school performance, and increases earnings in the next generation





# Why?

- Many workers struggle with taxes, and tax preparation services cut into their refund



"The good news is that you'll be getting a \$500 refund. The bad news is that our tax preparation fee is \$499."

# Who's Missing Out?

- **People with disabilities** may worry that tax credits endanger their Medicaid eligibility
- Claiming these credits **will not affect your eligibility for other benefits** like SNAP (food stamps), SSI, Medicaid, cash assistance, or public housing
- If you save your tax refund, it will not count against federally-funded benefit program resource/asset limits for 12 months after the refund is received
- <http://www.eitcoutreach.org/outreach-strategies/disabilities/>

# Six Steps You Can Take

## 1. Distribute information

## 2. Enlist partners

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

## 3. Conduct outreach events

## 4. Make sure tax sites are accessible

## 5. Use the media

## 6. Sustain efforts

# Resources

## TAX CREDIT OUTREACH KIT



[www.eitcoutreach.org/outreach-kit](http://www.eitcoutreach.org/outreach-kit)

# Outreach Strategies

## STRATEGIES FOR COMMUNITIES



**Foster Parents and  
Grandparents**



**Workers with  
Disabilities**



**Workers Who Are  
Homeless**



**Immigrant Families**



**Rural Communities**



**Tribal and Native  
Communities**



**Military Personnel  
& Returning  
Veterans**



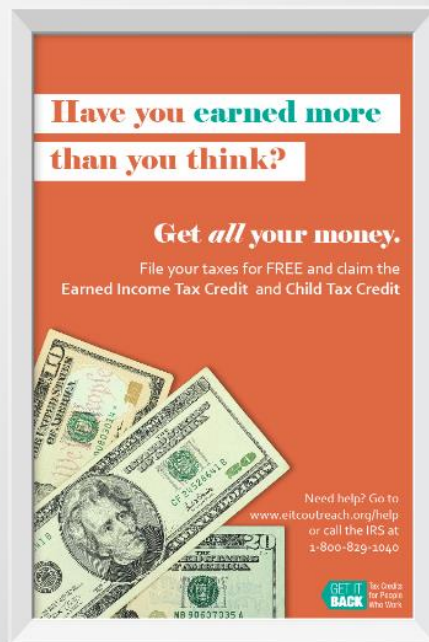
**Workers Not Living  
with Children**

[www.eitcoutreach.org/outreach-strategies/](http://www.eitcoutreach.org/outreach-strategies/)



# Printable Materials

## POSTERS



## FACT SHEETS

## FLYERS

in 24 languages



[www.eitcoutreach.org/outreach-strategies/materials/](http://www.eitcoutreach.org/outreach-strategies/materials/)

# Video



[youtu.be/TXsdp6SDKcY](https://youtu.be/TXsdp6SDKcY)



# Social Media



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



# Blog



## Americans Don't Hate Filing Taxes

April 14, 2016

It's almost Tax  
returns, many e  
conducted by t  
of Americans e  
their taxes. Re



## How to Throw an Awesome Tax Filing Event

March 9, 2016

The team at Prepare + Prosper (P+P), an organization that provides free tax and financial services in Minnesota, injects uniquely energetic tactics into their work. They are an enthusiastic bunch committed to helping people build a better

to them about their statewide Claim  
on, it's clear they're passionate—  
about taxes, savings, and talking



## Post This on Social Media, Part I

March 23, 2016

Here are seven images and Tweets you can use to promote tax credits and free tax filing on social media. Be sure to use the square image on Facebook, and the long, horizontal image on Twitter. Please link to this post (<http://bit.ly/1nRo0GY>) when you post any of



## Top Six Reasons to File Your Taxes for FREE

January 8, 2016

Tax time is right around the corner. A lot of people feel confused or intimidated and often turn to costly paid tax preparers for help. Luckily, there's an alternative. VITA — Volunteer Income Tax Assistance — is a program sponsored by the IRS that provides FREE tax filing! [Read more →](#)

[eitcoutreach.org](http://eitcoutreach.org/blog)  
[/blog](#)

# Webinars and Trainings



## VITA Volunteer Recruitment and Retention Training

September 27, 2016

As you prepare for the tax season, the Get It Back Campaign will present a training series on how VITA sites can effectively recruit and retain tax prep volunteers. [Read more →](#)



## Navigating FAFSA and the EITC

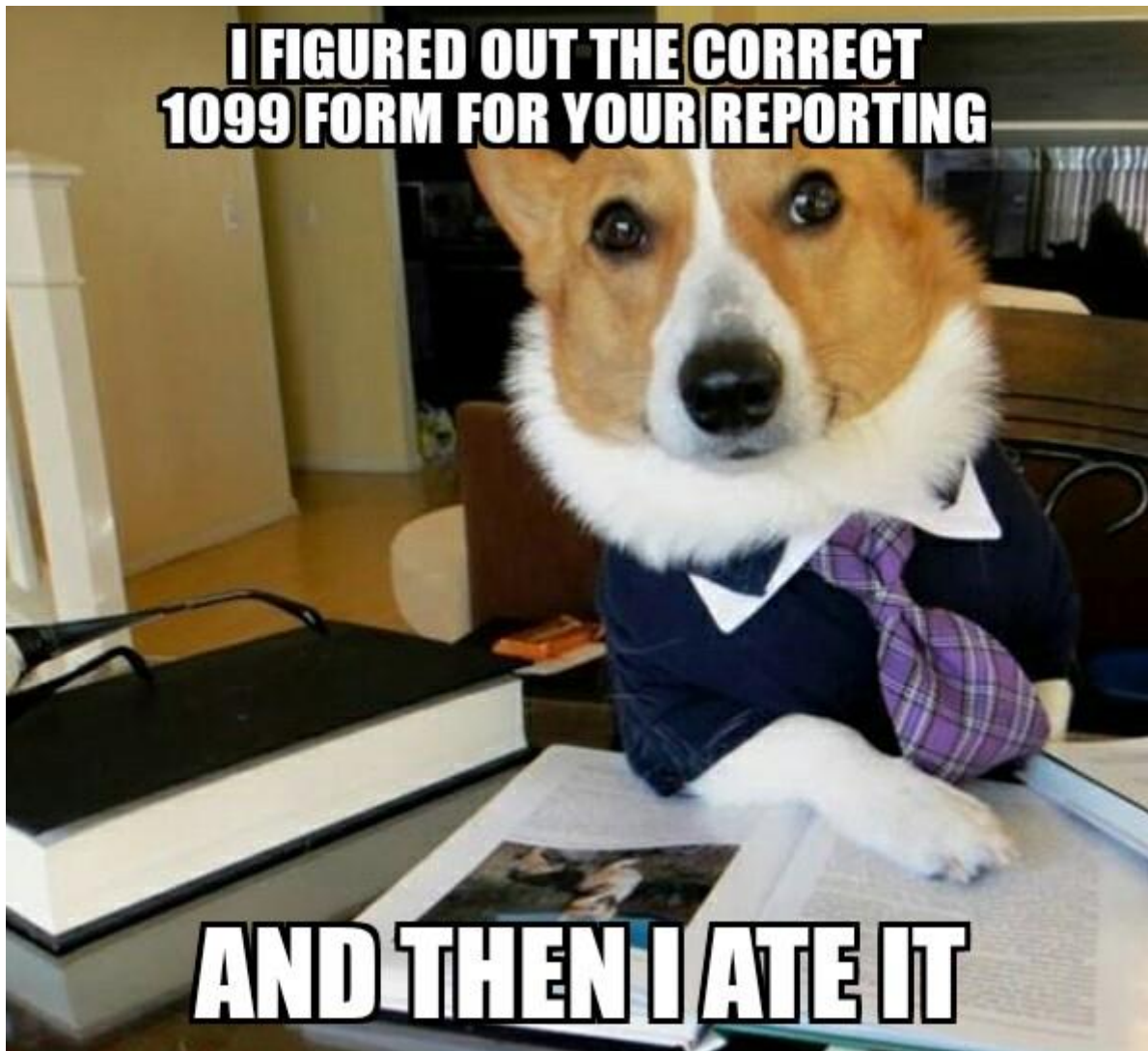
December 17, 2015

Uncertainty about how to pay for college shouldn't prevent students and families from applying from the beginning. Unfortunately, the Free Application for Federal Student Aid (FAFSA) can be an intimidating process. Like claiming the EITC, a tax return is required...

[Read More →](#)

[www.eitcoutreach.org/category/blog/events/](http://www.eitcoutreach.org/category/blog/events/)

**I FIGURED OUT THE CORRECT  
1099 FORM FOR YOUR REPORTING**



**AND THEN I ATE IT**

# Thank You for Joining!

## Stay Connected

- Website: [www.eitcoutreach.org](http://www.eitcoutreach.org)
- Partner: [www.eitcoutreach.org/partner](http://www.eitcoutreach.org/partner)
- Blog: [www.eitcoutreach.org/blog](http://www.eitcoutreach.org/blog)  
<http://www.realeconomicimpact.org/taxes-and-tax-preparation/virtual-toolkit>
- Facebook: [www.facebook.com/getitbackcampaign](http://www.facebook.com/getitbackcampaign)
- Email: [eitcoutreach@cbpp.org](mailto:eitcoutreach@cbpp.org) or [jhuang@cbpp.org](mailto:jhuang@cbpp.org)



# CA\$H Coalition of Greater Capital Region – Albany, New York

- The CA\$H Coalition serves an eight county region with over 20 VITA sites.
- Approximately 10% of the taxpayers served have disabilities.
- Tax prep for PWD is offered at all levels- full support at a regular community-based VITA site, partial support at a VITA site, support to schedule appointments at and transportation for community-based VITA sites, and ad hoc sites at disability organizations.

# CA\$H Coalition of Greater Capital Region – Albany, New York

- Tax sites on bus lines
- Tax sites have been evaluated for accessibility- Sites are 100% accessible.
- Tax preparers receive annual disability awareness training
- Interpreters are provided for any deaf taxpayers who request services
- PWD serve as volunteers at tax sites- greeters and intake specialists
- CA\$H Disability Initiative Committee provides outreach, promotion and education to PWD, and supports growth and development of tax sites

# Additional Resource

- National Disability Institute's Website

- Tax Time Tools

[www.realeconomicimpact.org/taxes-and-tax-preparation/virtual-toolkit](http://www.realeconomicimpact.org/taxes-and-tax-preparation/virtual-toolkit)

# QUESTIONS?



**DISABLE POVERTY** is a grassroots campaign which aims to increase awareness about the nearly one in three Americans with disabilities that live in poverty and remain outside the economic mainstream.

THE TWO OVERARCHING GOALS OF THE CAMPAIGN,  
TO BE ACHIEVED IN THE NEXT 10 YEARS, ARE TO:



**50** ▼

**DECREASE** the number of working-age adults with disabilities living in poverty **by 50%**



**50** ▲

**INCREASE** the use of mainstream banking products and services among Americans with disabilities **by 50%**

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**TAKE THE PLEDGE AT  
DISABLEPOVERTY.ORG**

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**DISABLE POVERTY**

National Disability Institute | realeconomicimpact.org

# Join the Movement!

## NDI's Real Economic Impact Network

Sign-up at [bit.ly/NDI-sign-me-up](http://bit.ly/NDI-sign-me-up)

**If you have questions on strategies to build the financial wellness of persons with disabilities, you can send your question to [ask@ndi-inc.org](mailto:ask@ndi-inc.org).**

# Wrap-Up & Thank You

**Join us for our next webinar:**

Wednesday, February 8, 2017 at 3 pm ET

*Guiding Individuals Towards a  
Savings Behavior*

*More information about this webinar will be sent out  
the the REI Network list via email in the coming  
weeks.*

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(such as today's recording),  
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