VITA Programs: Boost Capacity to Serve Taxpayers with Disabilities

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Building a Better Financial Future

December 1, 2022

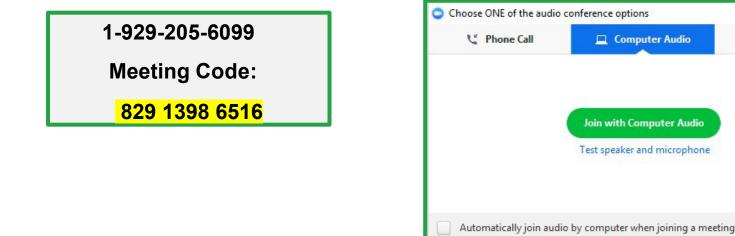


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Welcome (1)



Michael R. Roush, M.A., AFC® Director, Center for Disability-Inclusive Community Development (CDICD) National Disability Institute mroush@ndi-inc.org

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National Disability Institute (NDI)

- NDI is a national nonprofit organization dedicated to building a better economic future for people with disabilities.
- NDI is the first national organization committed exclusively to championing economic empowerment, financial education, asset development and financial stability for all persons with disabilities. NDI affects change through public education, policy development, training, technical assistance and innovative initiatives.
- Visit NationalDisabilityInstitute.org.



This webinar is hosted with support from

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SHARE OUR STRENGTH

Welcome (2)



Ana Maria Rivera Program Manager Family Economic Mobility

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SHARE OUR STRENGTH

 Does your free tax preparation/VITA program currently serve taxpayers with disabilities?

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o Yes

- o No
- Not applicable

- If you are with a free tax preparation/VITA program, how confident are you in your outreach efforts to taxpayers with disabilities?
 - Very confident
 - Somewhat confident
 - Not confident at all
 - Not applicable

- If you are with a free tax preparation/VITA program, how confident are you in making accommodation requests for taxpayers with disabilities?
 - Very confident
 - Somewhat confident
 - Not confident at all
 - Not applicable

 If you are a person with a disability, a family member or a disability service provider, have you used a VITA/free tax preparation service in the past?

o Yes

- \circ No
- Not sure
- Not applicable

NEW Resources and Tools to Boost Capacity to Serve Taxpayers with Disabilities

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Updated Tax Pages



FINANCIAL WELLNESS EMPLOYMENT CAPACITY BUILDING RESOURCES Q

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TAXES & TAX PREPARATION

Tax preparation is a way to engage taxpayers with disabilities in a larger conversation about financial wellness and economic advancement, including the Earned Income Tax Credit (EITC). National Disability Institute continues to work to increase Volunteer Income Tax Assistance (VITA) awareness and to build the capacity of tax coalitions to better serve taxpayers with disabilities, both in person and online.

FREE TAX PREPARATION

WHAT ARE THE OPTIONS AND WHO IS ELIGIBLE?

There are many free tax preparation options available. On average, households with an adjusted gross income (AGI) of \$66,000 or less may qualify for free tax preparation and filing using many different free tax preparation options both online and in person. Eligibility criteria can change from year to year, so be sure to check the options for eligibility with the service you choose.

RECENT WEBINARS:

TAXPAYERS WITH DISABILITIES AND FAMILIES: IT'S NOT TOO LATE TO MAXIMIZE YOUR 2021 TAX CREDITS



Taxes and Tax Preparation

COMMUNITY ORGANIZATIONS, SERVICE PROVIDERS AND EMPLOYERS ARE ENCOURAGED TO USE THESE FREE RESOURCES TO HELP INCREASE AWARENESS OF FREE TAX PREPARATION OPTIONS AND SERVICES.

DEVELOP FREE TAX PREPARATION PARTNERSHIPS

- Partner with the IRS and make a difference in your community
 - Utilize IRS Partner and Volunteer Resource Center
 - <u>Visit</u> the IRS Partner Outreach Corner for shareable content
- Locate a VITA site near you
- Become an IRS VITA Volunteer
- Contact AARP Foundation Tax Aide to volunteer
- Register as a partner with MyFreeTaxes.com
- · Call or visit 211 for expert essential services in the community

LOOKING FOR LOCAL PARTNERSHIP OPPORTUNITIES?

Download our Quick Reference Guide: Identifying Disability Partners in Your Community

Download



Informing Others About Free Tax Preparation

Website: Importance of Spreading the Word

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DOWNLOAD SHAREABLE OUTREACH MATERIALS

- You Earned It
- Prepare & File Your Taxes for Free
- <u>Mythbusters: Your Earned Income Tax Credit</u>
- IRS Partner Toolkit
- MyFreeTaxes Partner Portal
- EITC Awareness Day (January) Marketing Materials
- Get it Back campaign EITC and Child Tax Credit Outreach
- Outreach Connection free tax content from IRS
- IRS social media channels
- Social Media toolkit from IRS

DESIGNATE RESOURCES FOR FREE TAX PREP AWARENESS

- Provide staff training about free tax preparation services.
- Leverage company electronic and print newsletters and include downloaded information about free tax prep partners in the community.
- Allow employees extra time during or after work hours to prepare returns using online tax preparation software at work.
- Design a marketing plan

Helping others

DEVELOPING FREE TAX PREPARATION PROGRAMS

Understanding what free tax preparation is and promoting it are a great first step. But you may want to expand your outreach to include providing free in-person tax prep services on site. Doing this can be as simple as providing computer access for customers or as involved as hiring and training tax coaches to assist customers. Learn more about the options for developing your own free tax preparation program.

GETTING STARTED

The Volunteer Income Tax Assistance (VITA) grant program is an IRS initiative designed to support free tax preparation services for the underserved populations through various partner organizations. This service enables persons with disabilities, the elderly, low-to moderate-income individuals, and limited English speakers to file their taxes each year. IRS awards matching funds to organizations that offer free tax preparation services during the tax filing season.

HOW TO HELP IN YOUR COMMUNITY

Apply for a VITA grant

Become a VITA volunteer

Become an IRS Partner

- Offer space within your facility for free tax prep by trained volunteers on site
- Encourage employees to become VITA volunteers
- · Provide a tax coach or other trained volunteer onsite

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YOU CAN BECOME A VITA VOLUNTEER!

Volunteer to help your community with the Volunteer Income Tax Assistance Program! You will receive training to provide free tax help for low-to-moderate income families who need assistance preparing their tax returns. As a volunteer, you will join the thousands of others who each year prepare millions of tax returns at thousands of tax sites nationwide.



EXPANDING FREE TAX PREPARATION IN THE DEAF COMMUNITY

One of the best ways an organization can work towards effective communication access to the Deaf and hard-of-hearing community is to partner with the Deaf community. Through this collaboration, your organization doesn't have to be the expert, but rather can learn about the diversity of the Deaf community, how/when to hire sign language interpreters and how your agencies may work together to leverage resources. Below is a list of tips on how to ensure your agency is inclusive of the Deaf community in free tax preparation and other services.

- Use 'Deaf' alongside 'disability' in messaging and include Deaf partners on any listserves your agency sends out
- Use symbols and pictures in handouts, PPTs, resources
- Nominate Deaf partners to serve on local/state committees
- Encourage partnership between your network and Deaf partners
- Connect with Vocational Rehabilitation Counselors for the Deaf (RCD)

- Connect with Schools/College Programs for the Deaf
- Connect with Centers for Independent living with Deaf Programs/Staff
- Connect with Mental Health and Developmental Disability Programs for Deaf
- Promote and use Video Relay Services with your Deaf partners
- Recommend/Initiate Deaf Taskforces for deeper collaboration and more complex challenges

For other resources on Serving d/Deaf Taxpayers, check out <u>Statewide Services for Individuals who are Deaf and Hard of Hearing</u> and <u>IRS</u> <u>Videos in American Sign Language (ASL)</u>.

Free Tax Prep For People With Disabilities

Resources for Taxpayers with Disabilities

FREE TAX PREPARATION SERVICES & RESOURCES



PEOPLE WITH DISABILITIES

Free tax preparation introduces financial education to the disability community to help individuals build a more stable financial future.





JOB SEEKERS

Free tax preparation expands services in organizations who help job seekers in an easy and cost-effective way.

Learn More

WHY FREE TAX PREPARATION IN AN ORGANIZATION SERVING PERSONS WITH DISABILITIES?

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MORE INFORMATION FOR TAXPAYERS WITH DISABILITIES

- Quick Reference Guide ABLE Accounts and Tax-Time Savings
- Quick Reference Guide Taxes & Free Tax Prep: "I can't afford to file my taxes..."
- Quick Reference Guide Managing Money: "Other people manage my money; I don't know where to start...."
- Quick Reference Guide <u>Medical Benefits: "I can't afford to lose my medical benefits if I work...."</u>
- FAQs about Taxes and SSA Disability Programs
- Information for <u>Taxpayers with Disabilities</u>
- IRS offers information for people with disabilities and their families
- Disability and Earned Income Tax Credit

Free Tax Prep For People With Disabilities

Ensure Your Free Tax Prep Site is Accessible to All

ENSURE YOUR FREE TAX PREP SITE IS ACCESSIBLE TO ALL INCLUDING PERSONS WITH DISABILITIES

Effective Strategy Handouts

- Examples of People First Language
- Selecting an Interpreter
- Making Accommodation Requests for Taxpayers with Disabilities
- Why Ask the Disability Question at VITA Sites? | Asking the Disability Question A Script for VITA Preparers
- Technology Accessibility Resources Making Sure Your Website and Technology is Accessible

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Disability Script

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Why Ask the Disability Question at VITA Sites?

A Script for VITA Tax Preparers

Tax sites have shared that some volunteers are uncomfortable asking the disability question because they do not know why it is important and are afraid to offend someone by asking the question. The script allows VITA tax preparers to show this card to taxpayers or to read the information aloud.

This card would be most useful if copies could be placed at each VITA computer to allow the tax preparer to read it should they have any questions.

The cards are available for download at: bit.ly/disability-guestion.

How will the disability question script be beneficial to volunteers?

- It will provide volunteers the information they need to discourage fears of
 offending someone by asking this guestion.
- It will provide volunteers guidance on how to respond if the taxpayer asks them why they are asking.
- · It provides volunteers with the importance of the survey questions.

Where can I find the disability question?

- IRS Form 13614-C Intake/Interview & Quality Review Sheet (rev 10-2022)
- Question #6b "Last year, were you: Total and permanently disabled?" and/or
 - Question #9b "Last year, was your spouse: Totally and permanently disabled?"

Why is this question important?

- · Provides information on demographics being served at your VITA site.
- Expands research efforts on VITA customers with disabilities.
- Information collected is often used to report back to funders and potential funders
- Assists the IRS in determining their need to serve persons with disabilities through Outreach, Free Tax Preparation, and Financial Education

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Why the Disability Question? A Script for VITA Tax Preparers

- It provides information on demographics being served at your VITA site which includes people with disabilities who are often not counted.
- · It expands research efforts on VITA customers with disabilities.
- Data collected is often used to report back to current and potential funders so we may continue to provide this valuable free service.
- This information assists the Outreach and Education Department of the IRS which is committed to assisting people with disabilities on Tax Education, Free Tax Preparation, Financial Education and Asset Building opportunities.

Please note: All information collected is confidential. There are potential tax credits you might be eligible for if you or a person in your family does have a disability.

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bit.ly/Disability-Question

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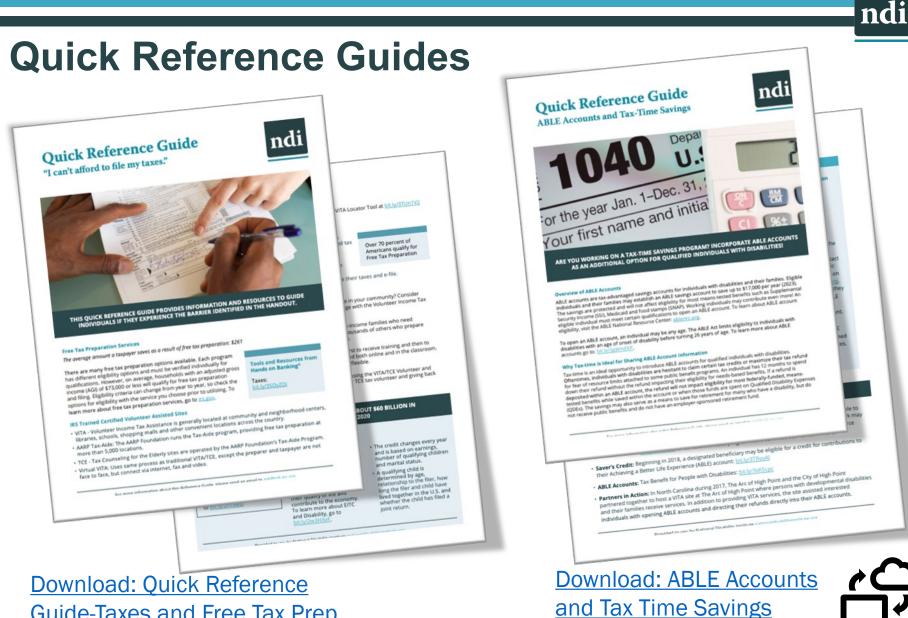
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Download: Why Ask the Disability Question at VITA Sites



Guide-Taxes and Free Tax Prep

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Resource: Person-First Language



Examples of Person-First Language

"People-first" language helps us remember that people are unique individuals and that their abilities or disabilities are only part of who they are. When writing or speaking about people with disabilities, it is important to put the person first. Group designations such as "the bilnd," "the retarded," or "the disabled" are inappropriate because they do not reflect the individuality, equality, or dignity of people with disabilities. Further, words like "normal person" imply that the person with a disability is not normal, whereas "person without a disability" is descriptive, but not negative. The accompanying chart shows examples of suggested alternative language to negative phrases.

Negative Phrases	Suggested Alternative Language		
Retarded, mentally retarded, mentally defective	Person with an intellectual or developmental disability		
Mentally ill, defective, nuts, crazy	Person with a mental health condition; Person living with a mental health condition or illness		
The blind, partially blind, vision impaired	Person who is blind; Person who has low vision; Person who has a vision impairment; Person whose vision is impaired		
The disabled, handicapped, physically challenged	Person with a disability		
The Deaf, Deaf and dumb, Deaf-mute	Person who is Deaf		
Suffers a hearing loss, hearing impaired, partially Deaf	Person who is hard of hearing		
Deaf and dumb, blind and mute	Deaf-Blind Person; Deafblind		
Afflicted by MS	Person who has multiple sclerosis		

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Download: Examples of Person-First Language

Negative Phrases	Suggested Alternative Language	
CP victim, CP person	Person with cerebral palsy	
Epileptic	Person with epilepsy; Person with seizure disorder	
Confined or restricted to a wheelchair, Wheelchair-bound person	Person who uses a wheelchair; Wheelchair user; Peron in a wheelchair	
Stricken by MD	Person who has muscular dystrophy	
Brain-damaged	Person with a traumatic brain injury; Person who has sustained a brain injury	
Downs person, mentally retarded, mongol	Person with Down Syndrome	
The autistic, autistic	Person who has autism; Person on the autism spectrum	
Crippled, lame, deformed, invalid, challenged	Person with a physical disability; Person who is physically disabled	
Dumb, mute	Unable to speak; Uses synthetic speech; Person who uses a communication device	
Normal, healthy, whole people	People without disabilities	

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Other Empowering Language:

If you are on a panel, be sure to ask which pronouns someone goes by. Don't make any assumptions about a person's pronouns.

Examples of Pronouns:

- She/her/hers
- He/him/his
- They/Them/Theirs
- · Zim/Zir/Zirs (Zim rhymes with them, Zir rhymes with their)

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Resource: Accommodation Requests

Making Accommodation Requests According to the Americans with Disabilities Act, any business open to the public shall make reasonable monitorial manimum an encodurate when the According to the American's with Uisabilities Act, any business open to the puto make reasonable modifications in policies, practices, or procedures when the providerations are nenessary to attord nends, services, facilities, privilence, adva make reasonable modifications in policies, practices, or procedures when the modifications are necessary to afford goods, services, facilities, phylleges, advantages, accommodations to individuals with deablaties, unless the nublic accommodation can What is an accommodation? modifications are necessary to afford goods, services, facilities, privileges, advantages, of accommodations to individuals with disabilities, unless the public accommodation can demonstrate that making the model accome works fundementativ alor the nation of the or accommodations to individuals with disabilities, unless the public accommodation can demonstrate that making the modifications would fundamentally alter the nature of the nords services facilities normanes anonexame or accommodations demonstrate that making the modifications would tundamentary atter to goods, services, facilities, phylleges, advantages or accommodations. Why should the organization include accommodation statements? Accommodation statements are necessary to ensure that persons with disabilities have facility access and effective communication (atternate formate internatione ato) for Accommodation statements are necessary to ensure that persons with disabilities ha facility access and effective communication (alternate formats, interpreters, etc.) for recomme and services. It uses take beneave with disabilities to our with your emanipair facility access and effective communication (alternate formats, interpreters, etc.) for programs and services. It also tels persons with disabilities know that your organization is willing and ready to service individuals with disabilities, and informer from of the evolution is willing and ready to service individuals with disabilities, and informer from of the evolution. programs and services. It also lets persons with disabilities know that your organization is willing and ready to serve individuals with disabilities, and informs them of the policies and procedures for requestion reasonable accommodations. is willing and ready to serve individuals with disabilities, and it and procedures for requesting reasonable accommodations. What content should be included in the accommodation statement? Step 1: Create Accommodation Statement Who to contact for an accommodation
 What the accommodation statement is intended for ... "in need of Where does the perion with the disability go to receive assistance: "Please cai 305-200-2005 of email 3002@2000X ..." (Ensure you are providing methods for different types of disabilities. For example, it your chone is not TTY compatible different types of disabilities. For example, if your phone is not TTY comp ensure you also provide email address and ensure your theriveballe is ensure you also provide email address and ensure your hyerwebsite is compatible with a screen reader for persons who may be blind or have low

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vision.) • When should the person with the disability request by ... *4-5 business days* www.nationaldisabilityinstitute.org

National Disability Institute Examples of Posted Notification from a covered entity The National Disability Institute encourages persons with disabilities to The National Disability institute encourages parsons with disabilities to participate in its programs and activities. If you anticipate needing any type of participate in its programs and activities. If you anticipate needing any type of accommodation or have a question about the physical access provided, please contact Name. Take takenhouse number should include TTV number if available. accommodation or have a question about the physical access provided, please contact (Name, Tille, telephone number, should include TTY number if evaluable). Please allow at least 3-5 business dave advance noise: test remute requests wa

- contact (Name, Title, lefeptone number, should include 11Y number is available). Pleade allow at least 35 business days', advance notice; last minute requests will be encoded to be inneu to inneuristic to busin. be accepted, but may be impossible to fulfill. Accommodations for persons with disabilities are available upon request. Please allow at least 3-5 business daw's advance online last minute reconcise will be Accommodations for persons with disabilities are available upon request. Plea Blow at least 3-5 business days advance notice: last minute requests will be allow at least 3-5 business days' advance notice; last minute requests will be accepted, but may be impossible to futfill. Call (Applicable number) (voice) or
- On a common fiver or where space is limited: "For more information or to make a insurantial accommodation material places contexts." Dir a common ther or where space is limited: "For more intomason or (basonable accommodation request, please contact ... (phone/email)"
- When: Post an accommodation statement anytime you are promoting services or activities. Step 2: Post Accommodation Statement

- activities. Where: Anywhere you are providing information (e.g. notice for special events
- Where: Anywhere you are providing information (e.g., holice for special events flyers, organization brochures, bulletin boards, websites, places where known barners exist). What: Providing a method of communication between persons with disabilities and your coalition to ensure services are available to everyone. Why: So that persons with disabilities know they are welcome to participate in What: Providing a method of communication between persons w and your coalition to ensure services are available to everyone.
- vor services and you will work to ensure their needs are met. Who is making the request? Consult the individual with a disability FIRST. Step 3: Fulfilling an Accommodation Request Who is making the request? Consult the individual with a disability FIRST. What do they need as an individual? Don't be afraid to ask questions to find with above their execute reserve. Consider their individual references to a due to re-What do they need as an individual? Don't be afraid to ask questions to rind out about their specific needs. Consider their individual preference, but don't be then it to the memory automaticate transmission. Used ensure mean ensure are not a
- out about their specific needs. Consider their individual preference, but don't be afrait to also make alternative suggestions, just ensure their needs are met as the and result.
- the end result. When? As soon as you receive the request, to allow time to adjust or make
- arrangements to fulfill it. www.nationaldisabilityinstitute.org

mitty who on your team will be responsible for fulfilling accommodation requests. ep 4: Other miscellaneous important tips Millify who on your learn will be responsible for fulfilling accommodation requests were everyone is aware of where to orient any advance or last-minute requests s with a "team" adjude, ensuring everyone in the organization knows this is Suborate with a "team" attitude, ensuring everyone in the organization knows this is wetning to be done to guarantee inclusiveness and should never be thought of as a proporate into your VITA training.)

are many services available to assist persons with disabilities. Some of the most

the are many services available to assist persons with t minor types of accommodations include the following:

Physical changes, such as installing a ramp or rearranging furniture for better sign language interpreters for people who are Deal A guideler workspace or other changes to reduce noisy distractions for someone work on interpreters december Sign language interpreters for people who are Deal With an intellectual disability Withou materials in an accessible format for individuals who are visually impaired Written materials in an accessible format for individuals who are visually im (e.g., Braile, audio tape, computer das or reading aloud to the individual)

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Download: Making Accommodation Requests and What is an Accommodation?



Customizable Promotional Flyers



Downloadable flyer: Your Earned Income Tax Credit Mythbusters Downloadable flyer: Prepare and file your taxes for free

Social Media Posts & Toolkit (1)

NDI/Share our Strength Social Media Messages

A	В	С	D	
TOPIC	AUDIENCE KEY MESSAGE		SOURCE	
DISABILITY SPECIFIC	Families with children with disabilities	#Parents of kids with #disabilities: If you qualify, an #IRS credit can mean < #tax refund #EITC https://go.usa.gov/xRFAk	IRS	
DISABILITY SPECIFIC	Individuals with disabilities	Special rules help people with #disabilities qualify for #EITC https://go.usa.gov/xRFAk #InclusionWorks	IRS	
DISABILITY SPECIFIC	Individuals with disabilities	Millions of #PeopleWithDisabilities miss out on #EITC because they don't file an #IRS #tax return https://go.usa.gov/xRFAk	IRS	
DISABILITY SPECIFIC	Individuals with disabilities	#PeopleWithDisabilities: Even if not required, filing a tax return with #IRS is only way to receive the #EITC #tax credit. Find out if eligible at https://go.usa.gov/xRFAk	IRS	
DISABILITY SPECIFIC	Individuals with disabilities	#PeopleWithDisabilities: #EITC #tax credit isn't counted as income for SS #disability benefits for 12 months https://www.irs.gov/credits-deductions/individuals/earn ed-income-tax-credit/disability-and-the-earned-income -tax-credit-eitc		



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Social Media Posts & Toolkit (2)

 How to use the document, News Articles, Hashtags and Accounts to Follow

OTHER CREDITS	All audiences	Qualify for #EITC? See what other tax credits are available - https://go.usa.gov/xRFGK		
EITC- Earned Income Tax Credit	Everyone	#EITC: Get it and Get it Right. Visit #IRS.gov - https://go.usa.gov/xRFGm	IRS	LINK TO IRS SOCIAL MEDIA GRAPHICS
EITC- Earned Income Tax Credit	Everyone	Single? No children? See if #EITC works for you - https://go.usa.gov/xRFGE	IRS	LINK TO IRS SOCIAL MEDIA GRAPHICS
EITC- Earned Income Tax Credit	Everyone	You earned it. Now file, claim it and get it- https://go.usa.gov/xRFGm	IRS	LINK TO IRS SOCIAL MEDIA GRAPHICS
EITC- Earned Income Tax Credit	Everyone	Ask your #tax preparer about #EITC, you may be eligible - #IRS https://go.usa.gov/xRFGE		
EITC- Earned Income Tax Credit	Everyone	Tax knowledge is freedom. Find out if you qualify for the Earned Income Tax Credit. What will you do with the extra money in your pocket? https://www.irs.gov/credits-deductions/individuals/earn ed-income-tax-credit-eitc	NDI	
FREE TAX PREPARATION + EITC	Everyone	Free tax preparation and help is available. Find out if you quality for #EITC and other #taxcredits - htts://go.usa.gov/xRFGV	IRS	LINK TO IRS SOCIAL MEDIA GRAPHICS
FREE TAX PREPARATION + EITC	Everyone	Free tax preparation help is available online and through a volunteer organization near you- htts://go.usa.gov/xRFGV #EITC #Get it Right.	IRS	LINK TO IRS SOCIAL MEDIA GRAPHICS





Previous NDI Tax-Related Webinars

- <u>Creating a Plan to Promote Free Tax Preparation Services</u> to Taxpayers with Disabilities - November 2, 2022
- <u>Taxpayers with Disabilities and Families: it's Not Too Late to</u> <u>Maximize Your 2021 Tax Credits</u> - October 6, 2022

Guest Presenter



Don Dill

Senior Tax Analyst SPEC HQ – National Partnerships Internal Revenue Service ndi



Resources

- Accessible Forms & Publications
- IRS ASL Videos
- Disability Related Products
- More Information for People with Disabilities

Special Guest



Sara Johnson Co-Founder and COO ndi



Creating Assets, Savings and Hope



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EVALUATION

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Please complete post-webinar evaluation upon sign-off



Additional Questions or Need Technical Assistance for Your Tax Outreach

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ask@ndi-inc.org

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Contact Information

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