

# All Hands on Deck: Local Strategies for Reaching All Families Eligible for the Child Tax Credit (CTC)

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[www.taxoutreach.org](http://www.taxoutreach.org)

# Center on Budget and Policy Priorities

Nonpartisan research and policy institute

We pursue federal and state policies designed both to reduce poverty and inequality in equitable and effective ways.

[www.cbpp.org](http://www.cbpp.org)

# Get It Back Campaign

National effort to connect eligible people 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

[www.taxoutreach.org](http://www.taxoutreach.org)

# Today

CTC Overview

Building the Case for Outreach

Local CTC Outreach Strategies

Resources

Q&A

# Check-in Question

Name

Organization

Tell us where you're joining from!

# Child Tax Credit Expansion Overview

# CTC Basics



- Under the American Rescue Plan, **almost every family can receive money from the Child Tax Credit**. This includes families:
  - That haven't filed a tax return
  - Without recent income
  - With a child with a social security number, even if they do not have one themselves
- Qualifying households will receive:
  - \$3,600 for each child under 6 years old
  - \$3,000 for each child between 6 and 17 years old
- Families can receive half of the payments in 2021 and the other half in 2022 after filing a tax return.
- The credit is not a loan. It does not impact public benefits.



## Impact

- Reduce child poverty by more than 40%.
  - Larger reductions for Black, Hispanic, & Native American children and children in deep poverty
- Advocates working to make expansion permanent





# The Portals

## Non-filer Portal

This portal allows you to:

- Sign up for advance CTC payments
- Claim the first and second stimulus checks as the Recovery Rebate Credit
  - If you didn't get the stimulus checks at all or didn't get the full amount you are eligible for
- Sign up for the third stimulus check

## Child Tax Credit Update Portal (CTC UP)

This portal allows you to:

- Opt-out of advance payments
- Change or add bank account information
- Eventually, you will be able to update your:
  - Income
  - Marital status
  - # of children
- **Note**: to use CTC UP, you must create an account through the IRS or ID.me

# The Challenge

## States, SNAP and Medicaid Agencies, Community Groups Well-Placed to Reach Families Who Need to File for Child Tax Credit

### ✓ Receiving automatic payments

Roughly 60 million children have already received payments

- Families who filed taxes in 2019 or 2020
- Families who used the EIP non-filer portal to claim an EIP for their dependent child

### ⊘ Not receiving automatic payments

Roughly 4 million or more children

- Roughly **2.3 million** children who do not appear on an existing tax return but have health insurance
- Approximately **1.6 million** children expected to be born in 2021 with Medicaid coverage
- **Uninsured children** who do not appear on an existing tax return

The groups above include, among others:

- **Immigrant parents** whose children have SSNs but have been hesitant or unable to file their tax returns
- Recipients of Social Security, Supplemental Security Income, Veterans Affairs pension or disability, or railroad retirement benefits who did not use the EIP non-filer portal to claim an EIP for their dependent child

[Report includes state by state numbers](#)

Notes: IRS issued automatic payments to 59.3 million children in July; that number is expected to rise in subsequent payment months. In addition to approximately 1.6 million newborns with Medicaid coverage, other children expected to be born in 2021 will also not receive automatic payments. EIP = Economic Impact Payment. SSN = Social Security Number.

Source: Data from U.S. Treasury, Medicaid and CHIP Payment Access Commission; see <https://www.cbpp.org/research/federal-tax/state-and-local-child-tax-credit-outreach-needed-to-help-lift-hardest-to-reach>

# CTC Non-filer Outreach

- The following groups are useful to prioritize for outreach.

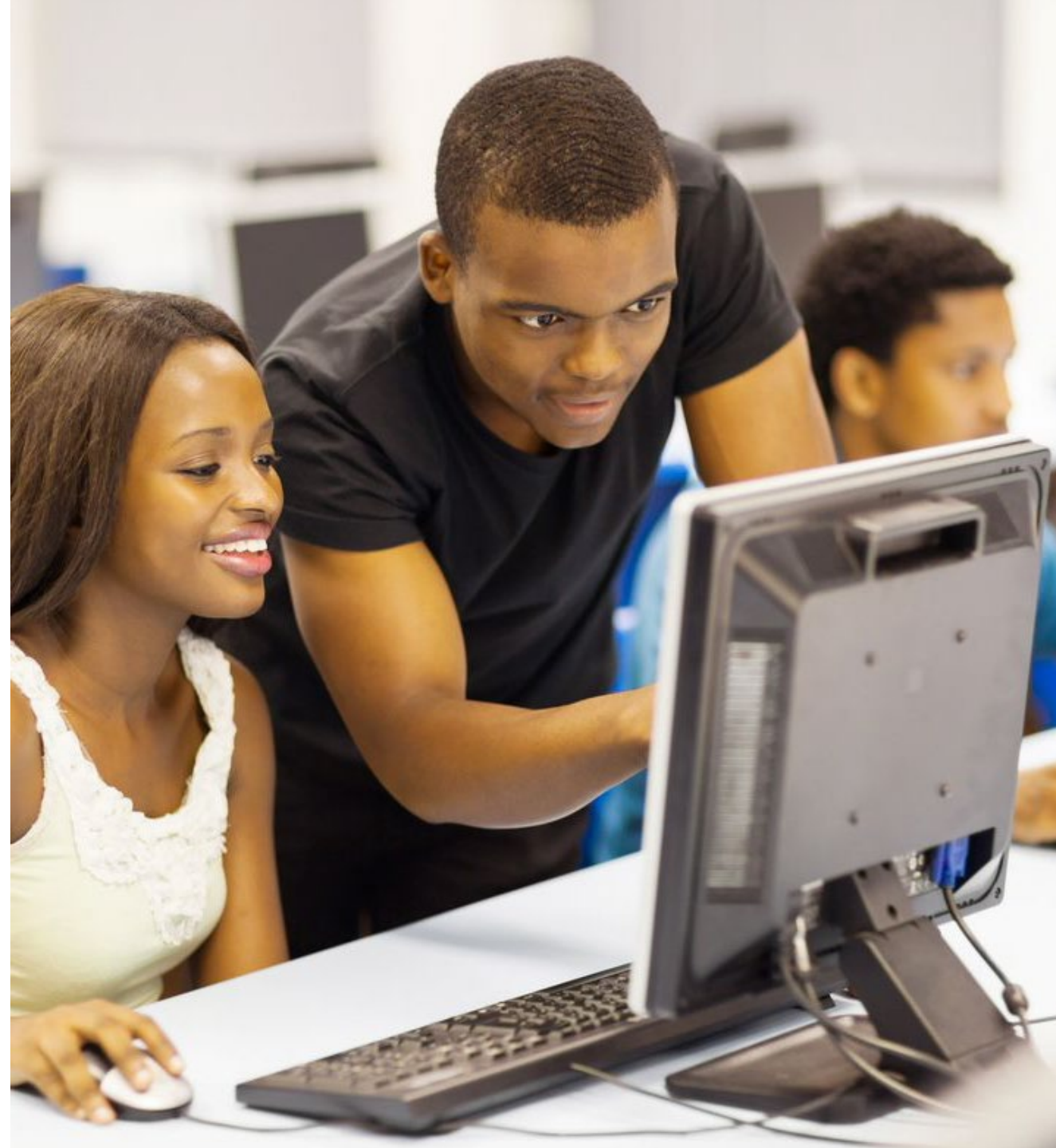
## **Parents and caregivers:**

- With very low incomes, including those who are self-employed
- With lower education levels
- With disabilities
- With limited internet access, or smartphone-only internet access
- Who are housing insecure
- Who are Black or American Indian or Alaska Native and other groups of color
- Who lack SSNs but whose children have SSNs
- Who don't speak English as their first language



## The Opportunity

- Help non-filers navigate challenges so they can submit their info to the IRS.



# **Funding and building the case for outreach**





# Child Tax Credit Outreach in Philadelphia

Contact: [beth.mcconnell@phila.gov](mailto:beth.mcconnell@phila.gov)

@PHL\_CEO



Office of

**Community Empowerment and Opportunity**

CITY OF PHILADELPHIA



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# 75,000 Philadelphians

lifted out of poverty





# 1: Boost Capacity of Tax Prep Partners

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**CAMPAIGN FOR WORKING FAMILIES**



Ceiba is a non-profit organization in Philadelphia that promotes the economic development and financial inclusion of the Latino community through collaborations and advocacy aimed at ensuring their access to quality housing



## 2: Craft a communications campaign

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**fact sheets &  
social media  
shareables in 9  
languages**

**KHÔNG CÓ THU  
NHẬP, KHÔNG  
PHẢI LÀ VẤN ĐỀ!**

**\$250** hoặc  
**\$300** cho mỗi  
trẻ em,  
mỗi tháng

Khai thuế để nhận \$250  
hoặc \$300 cho mỗi trẻ  
em, mỗi tháng từ IRS!

Tìm hiểu thêm:

**[phila.gov/childtaxcredit](https://phila.gov/childtaxcredit)**





# PHILLY PARENTS!

**\$250 or  
\$300  
per child  
per month**


Get \$250 or \$300 per child,  
per month from the IRS just by  
filing your taxes! Learn more:  
**[phila.gov/childtaxcredit](https://phila.gov/childtaxcredit)**

# DON'T HAVE AN SSN BUT YOUR KIDS DO?

**\$250 or  
\$300  
per child  
per month**

File your taxes to get \$250  
or \$300 per child, per month  
from the IRS! Learn more:  
**[phila.gov/childtaxcredit](https://phila.gov/childtaxcredit)**

- **Street teams**
- **Digital bus shelters & kiosks**
- **Door to door with vaccine outreach**
- **Mail to foster care providers**
- **More to come....**



**Good News For Parents** | **\$250 to \$300**  
PER CHILD, PER MONTH



**Claim the new child tax credit**  
from the IRS just by filing your taxes. Payments start as soon as July 2021.

**MOST PHILADELPHIA FAMILIES ARE ELIGIBLE.**

- Single income under \$75,000
- Single, file as head of household income under \$112,500
- Married combined income under \$150,000
- Income is \$0

Children under 6 <b>\$3,600 each year</b>	Children ages 6-17 <b>\$3,000 each year</b>
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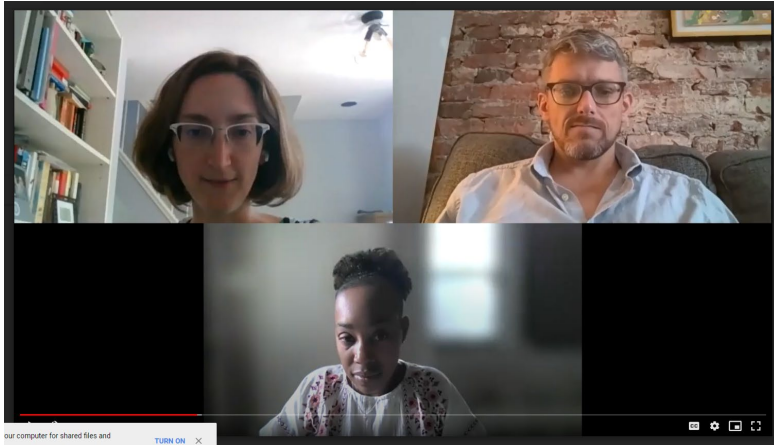
**Payments will not affect your other benefits like SNAP or Medicaid.** It's not too late to file your taxes to claim the payments for your children.  
**For free tax preparation, call 215-454-6483.**

  For more, visit **[phila.gov/childtaxcredit](https://phila.gov/childtaxcredit)**



### 3: Resource & train community partners

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- **CTC portal navigator training with Community Legal Services and Campaign for Working Families**
- **Grassroots grants coming soon**


watch training & download  
presentation:

[CTC Navigator Training 7-28-21 - Google Drive](#)



## 4: Data for outreach & evaluation

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- **Social service data to target kids in the lowest income households, plus Treasury zip code data**
  - **Upcoming: Test & evaluate outreach strategies (phone, text, mail, etc)**
  - **Upcoming: Service Design Studio (customer experience filing)**
  - **Upcoming: Focus Groups (non-claimers/non-filers)**
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## Highlights

- Connecting City-led initiatives
  - Outreach
- Bank On
  - Safe and Affordable Checking Accounts
- Child Tax Credits + Bank On Burque
- IRS and Bank On Burque Collaboration

# Connecting at the City of Albuquerque



<http://www.cabq.gov/consumer-financial-protection-initiative>



**Financial  
Navigators**

<https://www.cabq.gov/legal/financial-navigators>





## Ley del Plan de Rescate Estadounidense Iniciativa de protección financiera del consumidor

ALERTA:

### Anticipo de crédito fiscal por hijos

Las familias elegibles recibirán pagos mensuales del parte de la Ley del Plan del Rescate Estadounidense hijos y se harán llegar directamente a las personas a débito por parte del Servicio de impuestos interior.

Las personas elegibles recibirán hasta la mitad de mitad cuando presenten sus declaraciones de im día 15 de cada mes.

Tengan en cuenta que siempre hay estafadores.  
Deben tener presente que:

- Será únicamente el IRS quien
- NUNCA nadie del gobierno le
- mensajes directos para pedir
- NO comparta números del
- nadie que se ponga en con
- ¡Conserve su dinero! Los
- bancaria o criptomoneda
- Si alguien intenta estafa
- por su sigla en inglés) er

Las personas que no han devengado ir  
obtener más información sobre quien  
ingrese a: [www.irs.gov/credits-deductions](http://www.irs.gov/credits-deductions)

Se puede actualizar la información l  
pagos de agosto. Ingrese a este en/  
[deductions/child-tax-credit-update](http://deductions/child-tax-credit-update)

Si no tiene una cuenta bancaria c  
cuenta corriente segura y asequi

Si desea obtener más informac  
contactarse con otros recursos  
través de: [www.cabq.gov/legal](http://www.cabq.gov/legal)

Para conocer otras alerta  
[initiative](http://initiative)  
Julio de 2021

## 《美国救援计划法案》

消费者金融保护倡议

警告:

### 预付儿童税收抵免

《美国救援计划法案》的一部分，符合条件的家庭将从2021年7月15日到12月期间每月从政府领取款项。  
款项是家庭儿童税收抵免的预付款，将由美国国家税务局（IRS）通过直接存款、纸质支票或借记卡方式

## American Rescue Plan Act Consumer Financial Protection Initiative

ALERT:

### Advance Child Tax Credits

Eligible families will receive monthly payments from the government from July 15 through December 2021 as part of the American Rescue Plan Act. Monthly payments are an advance on families' child tax credit and will be sent directly to people through direct deposit, paper checks, or debit cards by the Internal Revenue Service (IRS).

People who are eligible will get up to half of their child tax credit in these monthly payments and the other half when they file their 2021 taxes. Payments will be received by families on about the 15<sup>th</sup> of each month.

Be aware that scammers are always on the rise when money from the government is in the news. Keep in mind:

- Only the IRS will be sending payments.
- The government will NEVER call, text, email, or DM you asking for money or information.
- Do NOT share Social Security, bank account, or debit and credit card numbers with anyone who contacts you.
- Keep your money! Requests to pay for assistance by gift card, wire transfer or cryptocurrency is not legitimate.
- If someone tries to scam you out of these payments report it to the Federal Trade Commission (FTC) at: [reportfraud.ftc.gov/](http://reportfraud.ftc.gov/)

People with no earned income in 2019 or 2020 can receive the Child Tax Credit. For more information on who can receive the Child Tax Credit including non-filers go to: [www.irs.gov/credits-deductions/advance-child-tax-credit-payments-in-2021](http://www.irs.gov/credits-deductions/advance-child-tax-credit-payments-in-2021)

Bank account information can be updated for receiving payments faster and safely starting with August payments. Go to this government link for more information: [www.irs.gov/credits-deductions/child-tax-credit-update-portal](http://www.irs.gov/credits-deductions/child-tax-credit-update-portal)

If you do not have a bank or credit union account and would like to find out more for setting up a safe and affordable checking account visit [www.cabq.gov/bankonburque](http://www.cabq.gov/bankonburque)

If you would like more information about the Advance Child Tax Credit or assistance with connecting to other resources contact a financial navigator at 505-768-4242 or online at: [www.cabq.gov/legal/financial-navigators](http://www.cabq.gov/legal/financial-navigators)

To see other Scam & Fraud Alerts visit [www.cabq.gov/consumer-financial-protection-initiative](http://www.cabq.gov/consumer-financial-protection-initiative)  
July 2021

## Đạo luật Kế hoạch Cứu trợ Người dân Mỹ Sáng Kiến Bảo Vệ Tài Chính Người Tiêu Dùng

CẢNH BÁO:

### Khoản Ưng Trước Tín Thuế Trẻ Em

gia đình đủ điều kiện sẽ nhận được các khoản thanh toán hàng tháng từ chính phủ từ ngày 15 tháng 7 đến tháng 12 năm 2021 như một phần của Đạo luật Kế hoạch Cứu trợ Người dân Mỹ. Các khoản thanh toán hàng tháng oản ứng trước tín thuế trẻ em của gia đình và sẽ được Sở Thuế vụ (IRS) gửi trực tiếp cho mọi người thông qua gửi trực tiếp, séc giấy hoặc thẻ ghi nợ.

người đủ điều kiện sẽ nhận được tối đa một nửa khoản tín thuế trẻ em của họ với các khoản thanh toán hàng này và nửa còn lại khi họ khai thuế năm 2021. Các gia đình sẽ nhận được tiền thanh toán vào khoảng 5 hàng tháng.

lời cảnh giác bởi những kẻ lừa đảo luôn gia tăng khi có tin tức về tiền chi trả từ chính phủ. Hãy nhớ

- Chỉ IRS mới gửi các khoản thanh toán.
- Chính phủ KHÔNG BAO GIỜ gọi điện, nhắn tin, gửi email hoặc gửi tin nhắn trực tiếp cho quý vị để yêu cầu cung cấp tiền hoặc thông tin.
- KHÔNG chia sẻ số An sinh Xã hội, tài khoản ngân hàng hoặc số thẻ ghi nợ và thẻ tín dụng với bất kỳ ai liên hệ với quý vị.
- Hãy bảo vệ tiền của quý vị! Các yêu cầu thanh toán để đổi lấy hỗ trợ bằng thẻ quà tặng, chuyển khoản ngân hàng hoặc tiền điện tử là bất hợp pháp.
- Nếu ai đó cố gắng lừa quý vị để lấy các khoản thanh toán này, hãy báo cáo cho Ủy ban Thương mại Liên bang (Federal Trade Commission, FTC) tại: [reportfraud.ftc.gov/](http://reportfraud.ftc.gov/)

li không có thu nhập tự kiểm được vào năm 2019 hoặc 2020 có thể nhận được Tín Thuế Trẻ em. Để biết tin về những ai có thể nhận được Tín Thuế Trẻ em, kể cả những người không nộp hồ sơ thuế, hãy truy [www.irs.gov/credits-deductions/advance-child-tax-credit-payments-in-2021](http://www.irs.gov/credits-deductions/advance-child-tax-credit-payments-in-2021)

khoản ngân hàng có thể được cập nhật để nhận thanh toán nhanh hơn và an toàn bắt đầu từ các loán của tháng 8. Quý vị hãy truy cập liên kết chính phủ này để biết thêm thông tin: [www.irs.gov/credits-deductions/child-tax-credit-update-portal](http://www.irs.gov/credits-deductions/child-tax-credit-update-portal)

ng có tài khoản ngân hàng hoặc công đoàn tín dụng và muốn tìm hiểu thêm để thiết lập tài khoản và giá cả phải chăng, hãy truy cập [www.cabq.gov/bankonburque](http://www.cabq.gov/bankonburque)

n biết thêm thông tin về Khoản Ưng trước Tín Thuế Trẻ em hoặc hỗ trợ kết nối với các nguồn lực với nhân viên điều hướng tài chính theo số 505-768-4242 hoặc trực tuyến tại: [www.cabq.gov/legal/financial-navigators](http://www.cabq.gov/legal/financial-navigators)

báo Lừa đảo & Gian lận khác, hãy truy cập [www.cabq.gov/consumer-financial-protection-initiative](http://www.cabq.gov/consumer-financial-protection-initiative)

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legal  
Contacte  
cabq.gov/finnav | 311

Navegadores  
Financieros



¿Le preocupa el dinero  
por causa de COVID-19?

Nuestros Navegadores Financieros  
trabajan con más de 100 socios para ayudar a las  
familias con lo que necesitan.

VISITE CABQ.GOV/FINNAV O  
CONECTARSE CON EL 311



Financial  
Navigators

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pháp lý  
Liên hệ  
cabq.gov/finnav | 311

Hướng Dẫn  
Tài Chính



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Contact  
cabq.gov/finnav | 311

Financial  
Navigators



Worried about money  
because of COVID-19?

Our Financial Navigators are working with  
more than 100 partners to help families get  
what they need.

CALL 311 OR VISIT CABQ.GOV/FINNAV TO GET  
CONNECTED TO RESOURCES

ONE  
ALBUQUE  
RQUE

法律  
联系  
cabq.gov/finnav | 311

财务导航员



是否因 COVID-19 而为  
金钱担忧？

财务导航员与 100 多个合作伙伴合作，  
帮助家庭获得所需援助。

拨打 311 或访问 CABQ.GOV/FINNAV 以获取资源

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With a nationally certified **BankOn** account,  
get your federal **Child Tax Credit** payment  
safer, faster + without fees

Join the Bank On movement

Learn how:  
[cabq.gov/bankonburque](https://cabq.gov/bankonburque)

Getting the Child Tax Credit? Get your money faster + safer, without  
fees – open a #BankOn certified account today!



Learn how:  
[cabq.gov/bankonburque](https://cabq.gov/bankonburque)





## Bank On National Account Standards Designed with Consumers in Mind



Bank On National Account Standards provide local programs with a benchmark for account partnerships with financial institutions.



### Safe

No overdraft, non-sufficient funds, or dormancy fees



### Affordable

Monthly fees of \$5 or less with a low minimum opening deposit



### Functional

Pay bills, make deposits and withdrawals, and transfer money

<https://joinbankon.org/accounts/>

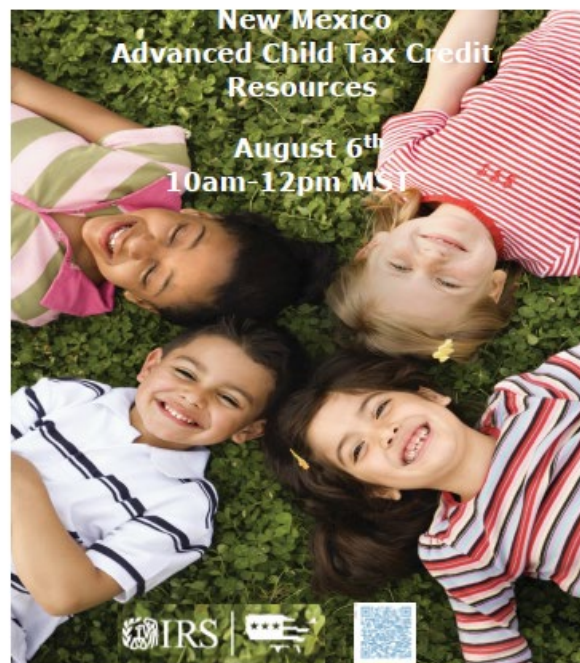
## **Child Tax Credit + Bank On Burque**

- Filers can now add or change their bank or credit union account information on the IRS's Child Tax Credit Update Portal: <https://www.irs.gov/credits-deductions/child-tax-credit-updateportal>
- Receive Child Tax Credit monthly payments and other emergency benefits by direct deposit. Direct deposit is faster, safer, and cheaper



# ONE ALBUQUE RQUE

You Are Invited to Join a Collaboration between:  
Internal Revenue Service  
and  
City of Albuquerque's Bank On Burque



Find out who qualifies for the Advanced Child Tax Credit,  
and how to enroll if they aren't already receiving payments.



Also learn about safe and affordable checking accounts  
that can help with receiving Advanced Child Tax Credit  
payments by direct deposit.

Register in advance for this meeting:

<https://irs.zoomgov.com/meeting/register/vJltceCupzoqHj76bGDTiwuNJUpoWCA-x-8>

After registering, you will receive a confirmation email containing information about joining the meeting.

<https://irs.zoomgov.com/meeting/register/vJltceCupzoqHj76bGDTiwuNJUpoWCA-x-8>





# THANK YOU!



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Bank On/Outreach  
Project Manager  
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Website: [www.cabq.gov/BankOnBurque](http://www.cabq.gov/BankOnBurque)

# Detroit's 2021 Child Tax Credit Campaign





# Campaign Activities

## 1. Public Events

## 2. Fund and Train CBOs to Conduct Individual Outreach

- Doorknocking, text/phone banking, in-person events, virtual events
- Canvassing script, FAQs, data collection tool

# Campaign Activities

- 1. Public Events**
- 2. Fund and Train CBOs to Conduct Individual Outreach**
- 3. Collaborate with Mass Outreach Partners**
  - School district, workforce development org, Head Starts, etc.

# Campaign Activities

1. Public Events
2. Fund and Train CBOs to Conduct Individual Outreach
3. Collaborate with Mass Outreach Partners
4. Comms Tools: Website, Flyer, Ads, Text Bot
5. Data Collection and Analysis



# Campaign Logistics

- ✓ Weekly Coalition Meetings
- ✓ Funding: \$750k
- ✓ Central data collection
- ✓ One website, one flyer

¿QUÉ SIGNIFICARÍAN \$250 (O MÁS)  
AL MES PARA SU FAMILIA?



A partir del 15 de julio, el nuevo crédito fiscal por hijo ofrece pagos mensuales en efectivo a las familias con hijos: ¡hasta \$300 por hijo!  
Si tiene hijos menores de 18 años, puede ser elegible incluso si no suele declarar impuestos o tiene ingresos bajos o nulos.

¿Ya ha presentado sus impuestos o ha completado el formulario del portal para no contribuyentes?  
Los pagos se depositarán en su cuenta bancaria o se le enviarán por correo automáticamente.

No podrá recibir sus pagos si no declara sus impuestos. No es demasiado tarde. Presente la declaración ahora.

## ¿CUÁNTO RECIBIRÁ MI FAMILIA DEL CRÉDITO FISCAL POR HIJOS?

Niños menores de 6 años: Hasta \$3,600 por niño

Niños de 6 a 17 años: Hasta \$3,000 por niño

Obtenga la primera mitad en pagos mensuales, de julio a diciembre de 2021.

Obtenga la segunda mitad -un pago único- después de presentar la declaración de impuestos de 2021.

## ¿NO TIENE HIJOS?

¡Aún puede ser elegible para otros créditos fiscales y pagos de alivio de COVID-19! Presente su declaración de impuestos para no perderse nada.

¿PREGUNTAS? ¿NECESITA AYUDA PARA DECLARAR SUS IMPUESTOS?  
LLAME AL 2-1-1 | ENVÍE UN MENSAJE DE TEXTO AL 313-450-9168 |  
INGRESE A [GETTHETAXFACTS.ORG](https://getthetaxfacts.org)

GetTheTaxFacts.org es posible gracias al apoyo de una coalición de socios y financiadores.





# ADDITIONAL RESOURCES FOR YOUR FAMILY

## GET HELP WITH PROPERTY TAX RELIEF

The Detroit Tax Relief Fund can eliminate the current year's property taxes and pay off property tax debt for homeowners at no cost.

Call 313-244-0274 or visit [WayneMetro.org/propertytax/](http://WayneMetro.org/propertytax/)

## GET INTERNET ACCESS

Receive a discount of up to \$50 per month toward broadband service and a one-time discount of up to \$100 to purchase a digital device.

Call 313-241-7618.

## GET HELP WITH PAYING RENT OR UTILITIES

Renters in Detroit may be eligible for rental assistance and utility assistance.

Go to [DetroitEvictionHelp.com](http://DetroitEvictionHelp.com) or call (866) 313-2520.

## GET HELP WITH FOOD EXPENSES

Detroiters can access food assistance services and programs.

To get connected to a food pantry, food benefits and more, call 2-1-1.

To find a summer children's meal program near you, text FOOD to 877-877.

## GET ACCESS TO QUALITY CHILD CARE, SCHOOLS OR AFTER-SCHOOL PROGRAMS

You can enroll your child in high-quality child care and educational opportunities.

For children under 5, visit [Connect4CareKids.org](http://Connect4CareKids.org).

For school-aged children, visit [DetroitSchoolsGuide.com](http://DetroitSchoolsGuide.com).

For after-school programs, visit [DiscoverYourSpark.org](http://DiscoverYourSpark.org).

## GET HELP OPENING A NO- OR LOW-FEE BANK ACCOUNT

Directly depositing money into your account is faster and safer than getting a check. Update your account information at [IRS.gov/ChildTaxCredit](http://IRS.gov/ChildTaxCredit).

Open a Bank On certified account at [CovidBanking.JoinBankOn.org](http://CovidBanking.JoinBankOn.org).

## GET ACCESS TO STATE BENEFITS

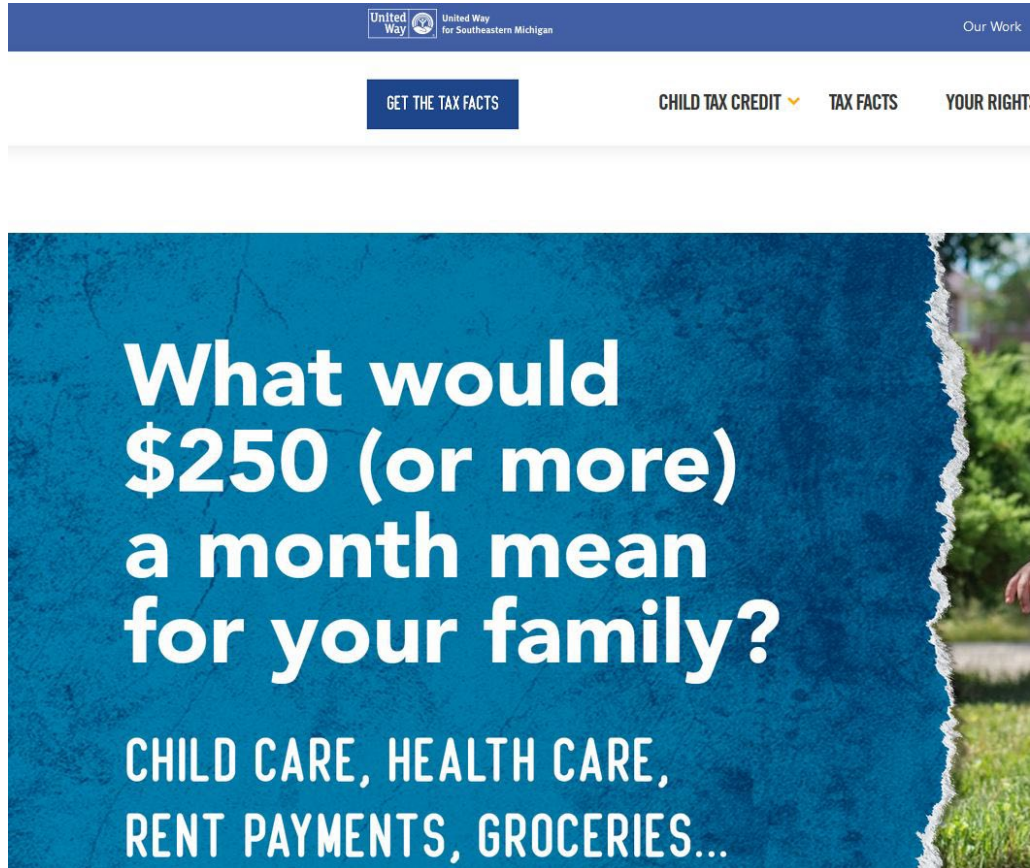
Access state benefits such as WIC, food assistance, child care subsidies and more through MiBridges.

FOR ALL OTHER NEEDS,  
CALL 2-1-1.

# Campaign Messages

- ✓ **The Child Tax Credit could put \$250+ per child in your pocket each month this year.**
- ✓ **You qualify even if you have low/no income.**
- ✓ **The only way to get your payments is to file your taxes. Get free help at [GetTheTaxFacts.org](https://www.getthetaxfacts.org).**

# GetTheTaxFacts.Org



The screenshot shows the top of the website. A dark blue header contains the United Way logo and the text "United Way for Southeastern Michigan" on the left, and "Our Work" on the right. Below the header is a navigation bar with a dark blue button labeled "GET THE TAX FACTS" and three links: "CHILD TAX CREDIT", "TAX FACTS", and "YOUR RIGHT". The main banner features a blue textured background with a torn paper effect on the right side, revealing a photo of a child. The text on the banner reads: "What would \$250 (or more) a month mean for your family?" followed by "CHILD CARE, HEALTH CARE, RENT PAYMENTS, GROCERIES..."

United Way for Southeastern Michigan Our Work

GET THE TAX FACTS CHILD TAX CREDIT TAX FACTS YOUR RIGHT

What would \$250 (or more) a month mean for your family?

CHILD CARE, HEALTH CARE, RENT PAYMENTS, GROCERIES...

**UNDER AGE 6**

**UP TO \$3,600**

**TOTAL POSSIBLE ANNUAL BENEFIT PER CHILD**

That breaks down to:

**\$300 per month per child from July – December 2021**, totaling up to \$1,800 in 6 months for the first half of the payment

plus

**\$1,800 per child in a one-time payment** after filing 2021 taxes. Payment will be made after April 2022.

**You can't get your payments if you don't file your taxes. File now. It's not too late.**



**I FILED MY 2020 OR 2019  
TAX RETURN. NOW WHAT?**

**LEARN MORE**



**I HAVEN'T FILED YET.**

**FILE ONLINE FOR FREE NOW**

**LEARN MORE**



**I NEED HELP FILING.**

**MAKE AN IN-PERSON APPOINTMENT**

**MAKE A NO-CONTACT APPOINTMENT**

**LEARN MORE**



**I'VE NEVER FILED MY TAXES BEFORE. I DON'T MAKE ENOUGH MONEY (OR MY INCOME IS NOT TAXED). AM I ELIGIBLE? WHAT DO I NEED TO DO TO FILE MY TAXES NOW?**



**I DON'T WANT TO FILE A TAX RETURN. I'VE HEARD THAT THE IRS IS OFFERING A NEW NON-FILER TOOL TO CLAIM THE CHILD TAX CREDIT. CAN I USE THAT INSTEAD?**



**I HAVEN'T FILED TAXES IN A LONG TIME, BUT I DID REGISTER FOR THE STIMULUS PAYMENTS LAST YEAR. WHAT ARE MY OPTIONS?**





## SEARCH FOR RESOURCES NOW

From child care and education resources to free tax prep and financial coaching, United Way works with hundreds of partners to provide services that help families become stable and ensure their children can thrive.

Explore our resources, or call 2-1-1 for help.

[EXPLORE RESOURCES](#)

# Thanks!





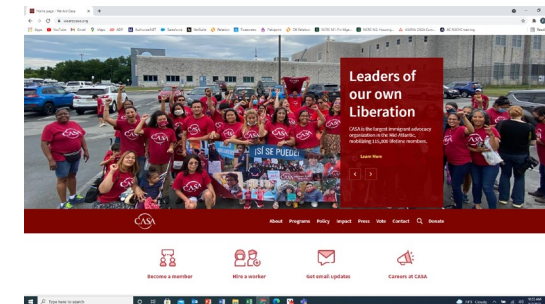
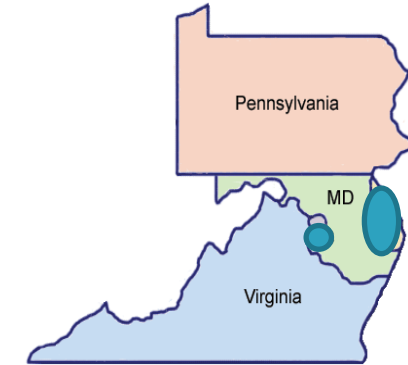
# All Hands on Deck: Local Strategies for Reaching All Families Eligible for the CTC

Awareness and Accessibility for  
Taxpayers filing with an ITIN

August 2, 2021  
Webinar



- ✓ **CASA is the largest immigrant's rights organization in the mid-Atlantic Region.**
- ✓ **We have over 120,000 members, now in 43 states.**
- ✓ **We have offices in Maryland, Pennsylvania, and Virginia.**
- ✓ **CASA combines services and organizing and political action (CASAinAction –c4 org)**
- ✓ **Services include citizenship preparation and application, ESOL classes, workforce development and day labor centers, legal services in immigration, housing, and employment, health navigation and COVID-19 response.**
- ✓ **We also run four VITA Sites (Volunteer Income Tax Assistance) in York (PA), Baltimore (MD), Langley Park/Rockville (MD), and Woodbridge (VA).**
  - ✓ **We served 2,000 taxpayers every year.**
  - ✓ **We process over 500 new/renew ITIN applications.**
  - ✓ **We offer CAA (Certified Acceptance Agent) services in Langley Park/Rockville.**
- ✓ **CASA members filed lawsuits against the Trump Administration for leaving out of the first economic stimulus check those parents of USC children who file taxes with ITIN.**





### **Immigrants confront many barriers to access this benefit**

- ✓ **Awareness**
- ✓ **Accessibility**





## **Immigrants confront many barriers to access this benefit**

- ✓ **Awareness**
  - ✓ **Many do not know about this benefit**
  - ✓ **Many do not know they qualify to get this benefit**

**(Yes! If your kid has a SSN, you will receive the CTC regardless of you filing taxes with an ITIN!)**



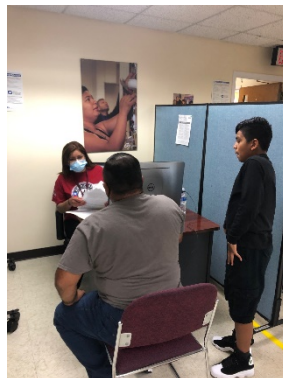
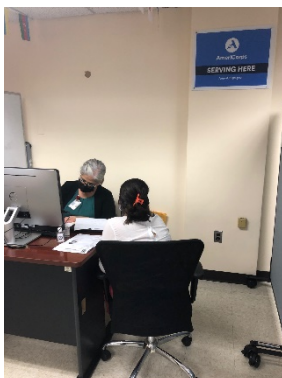
## **Immigrants confront many barriers to access this benefit**

- ✓ **Accessibility**
  - ✓ **Many do not know how to file taxes**
  - ✓ **Many do not have the money to pay for a tax preparer**
  - ✓ **Many do not know how to use the IRS non-filer portal**
  - ✓ **Many ITIN filers have trouble to get required documents from schools and doctors to prove children's residence.**
  - ✓ **IRS backlog in processing ITIN applications**
  - ✓ **Language is a barrier.**
    - ✓ **Just this year the IRS 1040 form was translated into Spanish (in paper)**
    - ✓ **The IRS non-filer form is only in English**



## Our ACTC Campaign

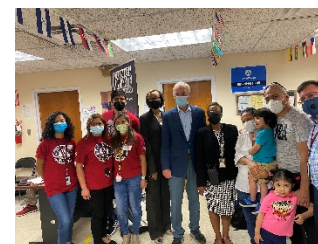
- ✓ We are partnering with the IRS to re-open our VITA Site



Taxpayers Advocates Services



DOT Tax Fraud Prevention



MD's Comptroller



Recognized by IRS Commissioner  
at the SPEC Ceremony



### Our ACTC Campaign

- ✓ We had interviews with media outlets such as NPR, Univision, Telemundo, to explain the CTC benefit, how to apply, and how to avoid fraud.



- ✓ Together with national partners and attorneys, we are tracking IRS's ITIN processing policies and their implementation.





## The ITIN myths!

- ✓ It is too complicated to file,
- ✓ We do not speak Spanish,
- ✓ We are not Certified Acceptance Agents

## How to file an ITIN application?

- ✓ Complete a 1040 form (tax declaration)
- ✓ Complete a W7 form (Application for ITIN)
- ✓ Paper-file both forms together with your original ID document. (mailing it to the IRS)

**W-7** Application for IRS Individual Taxpayer Identification Number

Form (Rev. August 2018)  
Department of the Treasury  
Internal Revenue Service

OMB No. 1545-0074

For use by individuals who are not U.S. citizens or permanent residents.  
See separate instructions.

An IRS individual taxpayer identification number (ITIN) is for U.S. federal tax purposes only.

Before you begin:  
• Don't submit this form if you have, or are eligible to get, a U.S. social security number (SSN).  
• Reason you're submitting Form W-7: Read the instructions for the box you check. Caution: If you check box b, c, d, e, f, or g, you must file a U.S. federal tax return with Form W-7 unless you meet one of the exceptions (see instructions).

a ☐ Nonresident alien required to get an ITIN to claim tax treaty benefit  
b ☐ Nonresident alien filing a U.S. federal tax return  
c ☐ U.S. resident alien (based on days present in the United States) filing a U.S. federal tax return  
d ☐ Dependent of U.S. citizen/resident alien  
e ☐ Spouse of U.S. citizen/resident alien  
f ☐ Nonresident alien student, professor, or researcher filing a U.S. federal tax return or claiming an exception  
g ☐ Dependent/spouse of a nonresident alien holding a U.S. visa

Additional information for a and f: Enter treaty country: \_\_\_\_\_ and treaty article number: \_\_\_\_\_

**Name**  
(see instructions)  
Name at birth if different: \_\_\_\_\_

**Applicant's Mailing Address**  
2 Street address, apartment number, or rural route number. If you have a P.O. box, see separate instructions.  
City or town, state or province, and country. Include ZIP code or postal code where appropriate.

**Foreign (non-U.S.) Address**  
(see instructions)  
3 Street address, apartment number, or rural route number. Don't use a P.O. box number.  
City or town, state or province, and country. Include postal code where appropriate.

**Birth Information**  
4 Date of birth (month / day / year) Country of birth City and state or province (optional) Sex ☐ Male ☐ Female

**Other Information**  
5a Country(ies) of citizenship 5b Foreign tax I.D. number (if any) 5c Type of U.S. visa (if any), number, and expiration date  
6a Identification document(s) submitted (see instructions) ☐ Passport ☐ Driver's license/State I.D.  
☐ USCIS documentation ☐ Other \_\_\_\_\_ Date of entry into the United States MM/DD/YYYY / /  
Issued by: No: Exp. date: / /  
6b Have you previously received an ITIN or an Internal Revenue Service Number (IRSIN)?  
☐ No/Don't know. Skip this set.  
☐ Yes. Complete this set if more than one, list on a sheet and attach to this form (see instructions).  
6c Enter ITIN and/or IRSIN: ITIN: \_\_\_\_\_ IRSIN: \_\_\_\_\_ and name under which it was issued: First name Middle name Last name  
6d Name of college/university or company (see instructions) \_\_\_\_\_ Length of stay: \_\_\_\_\_  
City and state: \_\_\_\_\_

**Sign Here**  
Under penalties of perjury, I (signer/acceptance agent) declare that I have examined this application, including accompanying documentation and statements, and to the best of my knowledge and belief, it is true, correct, and complete. I authorize the IRS to share information with my acceptance agent in order to process this Form W-7, Application for IRS Individual Taxpayer Identification Number.

Keep a copy for your records.

Signature of applicant (if overseas, see instructions) Date (month / day / year) Phone number  
Name of delegate, if applicable (type or print) \_\_\_\_\_ Date (month / day / year) \_\_\_\_\_  
Signature of delegate to applicant \_\_\_\_\_ Date (month / day / year) \_\_\_\_\_  
Signature \_\_\_\_\_ Date (month / day / year) \_\_\_\_\_  
Name and title (type or print) \_\_\_\_\_ Name of company \_\_\_\_\_ EIN \_\_\_\_\_ PTIN \_\_\_\_\_  
Office code \_\_\_\_\_

For Paperwork Reduction Act Notice, see separate instructions. Form W-7 (Rev. 8-2018)



**Thank you**

Pablo Blank  
CASA  
Director of Immigrant Integration  
[pblank@wearecasa.org](mailto:pblank@wearecasa.org)  
240-491-5705

## 2021 Child Tax Credit Outreach Resources

[Home](#) > [Tax Filing Resources](#) > [Stimulus Payments Outreach Resources](#) > 2021 Child...

The 2021 Child Tax Credit (CTC) expansion provides a historic opportunity to reduce child poverty in the United States by more than 40 percent.

While most children in the US are in families that will get advance CTC payments automatically, some children are in families that are considered non-filers and will need help signing up for them.

Your efforts to help people get advance CTC payments are essential. Many people will need help to understand their eligibility and to use the IRS Non-filer portal.

### Key Dates:

- **July 15:** Advance payments start.
- **Mid-August/Early September:** Back to school provides a key outreach opportunity.
- **Late fall:** IRS Non-filer Form closes.

### CTC Eligibility 101

- **No recent income needed**
- Up to **\$300 per month** per child starting July 15
- Credit is **not a loan**
- Any **child with a valid SSN** is eligible
- Provide your info to the IRS to get the credit

[CTC FAQs](#)

[GET STARTED GUIDE](#)

# Outreach Materials

## OUTREACH TOOLKIT

- Messaging and earned media materials
- Social media toolkit
- Call and text scripts and newsletter copy
- Flyer and postcard

[DOWNLOAD TOOLKIT](#) 

## NAVIGATOR TRAINING AND RESOURCES

Navigators are trusted, community-based guides that help marginalized people get their payments.

- Non-filer Form guide
- CTC Update Portal guide
- Navigator training

[NAVIGATOR RESOURCES](#) 

## RESOURCES FOR IMMIGRANT OUTREACH

Immigrants and their families face some of the biggest barriers to getting the Child Tax Credit, stimulus checks, and other benefits. This page has links to various outreach resources for immigrants and their families.

[IMMIGRANT OUTREACH](#) 



# Social Media Toolkit

## Have You Gotten Your Child Tax Credit Yet?

You could get up to

**\$3,600**  
**per child**  
under age 6



**\$3,000**  
**per child**  
ages 6-17

from the IRS



**New Child Tax Credit  
Available for Non-Filers**

# Flyer



## Have you gotten your Child Tax Credit yet?

You could get up to \$3,600 per child under 6 years old and up to \$3,000 per child between 6 and 17 years old from the IRS.

**The Child Tax Credit is not a loan.**

### Who qualifies?

Almost all families qualify for the Child Tax Credit. Even families that haven't filed a tax return or don't have recent income.

Anyone with a child who has a Social Security number can get the Child Tax Credit, even if they don't have one themselves. Receiving this tax credit has no impact on other public benefits you receive.

### When will I get the money?

Payments will be issued monthly July – December 2021 through monthly payments of up to \$250. You will receive the other half in 2022 after filing a tax return.

### How do I get the credit?

**You'll need to send your info to the IRS. Visit [GetCTC.org](https://getctc.org), call 211 or use the QR code** to learn more about how to get your money!



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You could get up to \$3,600 per child under 6 years old and up to \$3,000 per child between 6 and 17 years old from the IRS.

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### Who qualifies?

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### When will I get the money?

Payments will be issued monthly July – December 2021 through monthly payments of up to \$250. You will receive the other half in 2022 after filing a tax return.

### HOW DO I GET THE CREDIT?

**You'll need to send your info to the IRS. Visit [GetCTC.org](https://getctc.org), call 211 or use the QR code** to learn more about how to get your money!



# Links!

CTC Outreach Resources Hub: [www.taxoutreach.org/coronavirus](http://www.taxoutreach.org/coronavirus)

## RESOURCES:

[What's New about the Child Tax Credit in 2021?](#)

[Getting Started with Outreach](#)

[Multilingual Child Tax Credit Outreach Materials](#)

[CBPP paper \(non-filer data\)](#)

## NAVIGATOR RESOURCES

[Navigator Training](#)

[How to Fill out the IRS Non-filer Form](#)

[How to use the IRS Child Tax Credit Update Portal \(CTC UP\)](#)

[CfA Materials](#)

## [OUTREACH TOOLKIT:](#)

Messaging and earned media materials, social media toolkit, call and text scripts and newsletter copy, flyer and postcard

# Where should I refer people for help?

The best place to refer someone for help is a local organization. Here are some of the national services that can support your outreach

**GetCTC.org:** This site explains the credit, eligibility, and how to get the credit. It directs people to the IRS non-filer form, virtual free tax filing services and the Child Tax Credit Update Portal.

**211:** This hotline service from United Way connects people to local resources for support. It can answer basic questions about the CTC and direct callers to any free tax filing services.

**ChildTaxCredit.com:** This website features FAQs and a wonderful CTC eligibility calculator that can help people understand how much they can get from the credit.

**LetsGetSet.co:** This website offers tools and resources to help new parents making less than \$40k access and save tax credits. New and expecting parents can sign up for texts via this link: [letsgetset.link/getitback](https://letsgetset.link/getitback) or by texting "CTC" to 844-921-5747 to stay informed about key updates in the portals (like when the feature to add a child born in 2021 goes live), get links to resources, and text-in questions.



## Contact Info

Get It Back Campaign  
Center on Budget and  
Policy Priorities

[eitcoutreach@cbpp.org](mailto:eitcoutreach@cbpp.org)

(202) 408-1080

[www.taxoutreach.org](http://www.taxoutreach.org)

### Let's keep in touch

Tax credits help working families and their communities thrive. Sign up to help spread the word about these important tax credits and free tax filing. We send occasional emails with resources to help your work.

email

Subscribe

<http://eepurl.com/gdIHn1>