



PIH

OFFICE OF PUBLIC & INDIAN HOUSING

Helping Tenants Access Their Economic Impact Payments

August 26, 2020



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OFFICE OF PUBLIC & INDIAN HOUSING



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Presenters

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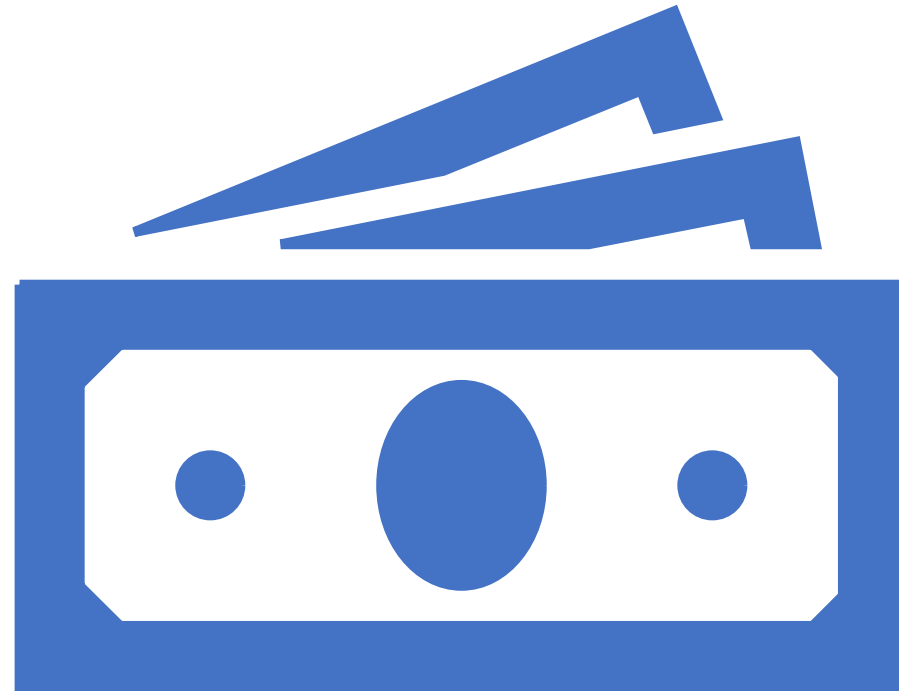
Manager of Community Impact & Economic Mobility, United Way Worldwide

Economic Impact Payments (EIP)

Roxy Caines

*Center on Budget & Policy
Priorities*

August 26, 2020



EIPs: The Basics

Why Are Economic Impact Payments (Stimulus Checks) Important?

- \$1,200 temporary tax credit
- Non-taxable money
- No minimum income needed to get the payment
- Will not impact federal benefit programs like SNAP, Medicaid or TANF



Who's Eligible for Economic Impact Payments & How Much are They Worth?

- **Payment Value**
 - \$1,200 for individuals or \$2,400 for married couples filing jointly
 - \$500 is provided for each qualifying child
- **Income**
 - No minimum income
 - Full payments for people with Adjusted Gross Income up to:
 - Individuals – \$75,000
 - Married filing jointly – \$150,000
- **Social Security Numbers**
 - Required for both spouses (one for military) and qualifying children
 - Adoption Taxpayer Identification Number (ATIN) is acceptable for a qualifying child
- **Dependency**
 - You cannot be claimed as a dependent on someone else's tax return
 - Qualifying children:
 - Must be a dependent under 17
 - If a child has an Individual Taxpayer Identification Number (ITIN), the family can still get the payment, but not the money for the child



EIPs:

How do People Get Payments?

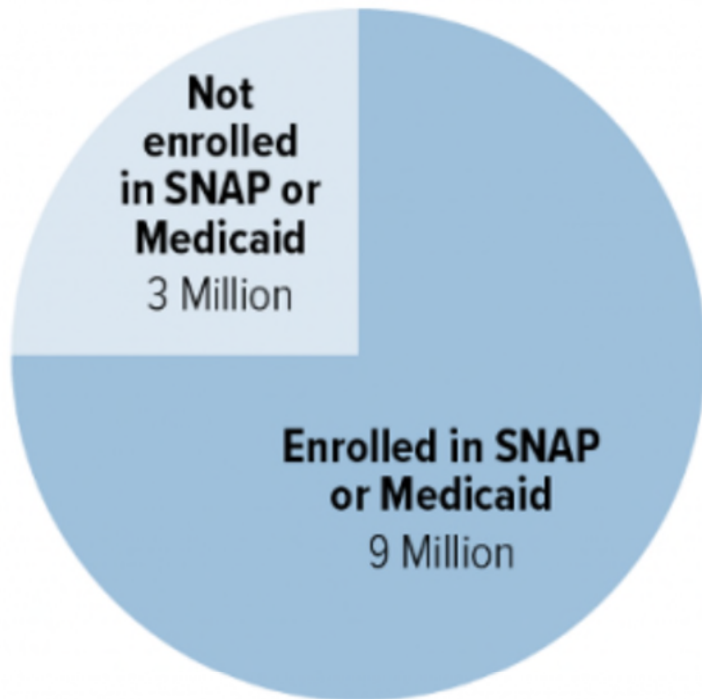
Who Automatically Receives an EIP Check?

- Those who filed taxes in 2018 or 2019
- Recipients of:
 - Social Security
 - SSI
 - Disability
 - Veteran's Pension
 - Railroad Retirement



Who DOES NOT Automatically Receive an EIP Check?

States Can Use SNAP and Medicaid to Reach Most of 12 Million People Not Receiving Automatic Stimulus Payments



- About 12 million non-tax filers or non-recipients of benefits.
- About 9 million of these eligible individuals receive SNAP and/or Medicaid, 3 million do not.

People Who Don't Get the Stimulus Automatically Need to Take Action

- Most will need to file an online form to get the payment
 - <https://www.irs.gov/coronavirus/non-filers-enter-payment-info-here>
- Some may be eligible for other tax credits and may want to file a 2019 tax return to get even more money.
 - Tax year 2019 filing threshold:
 - Single – income above \$14,200
 - Married filing jointly – income above \$24,400
- The IRS will deliver payments through direct deposit or mail a paper check



Who Are Non-Filers?

Through SNAP and Medicaid, States Can Reach Many Not Receiving Automatic Stimulus Payments

✓ Receiving automatic payments

- Tax filers in 2018 or 2019
- Social Security recipients
- Supplemental Security Income recipients
- Veterans Affairs pension or disability recipients
- Railroad Retirement recipients

⊘ Not receiving automatic payments

About 12 million people

- **9 million** didn't file tax returns for 2018 or 2019 or receive any benefits listed above, but do receive SNAP and/or Medicaid
- **3 million** didn't file tax returns for 2018 or 2019 or receive any benefits listed above, and don't receive SNAP or Medicaid

9 million non-filers likely participate in TANF, SNAP, and/or Medicaid.

Of the 9 million:

- 3.2 million are under age 17
- 40% are adults without minor children (many under 25 as well as those between 50-65)
- Many are likely people without secure housing

EIPs: Why Outreach Matters

Why is Stimulus Outreach Needed?

- Automatic payment delivery misses some people
- Answer questions that may prevent eligible people from signing up
- People need help completing the online form



Filing Deadline

Eligible individuals have until



to file for their EIP to receive payment this year.

People Who Automatically Receive an EIP Check Include:

- Those who filed taxes in 2018 or 2019
- Recipients of:
 - Social Security
 - SSI
 - Disability
 - Veteran's Pension
 - Railroad Retirement



Deadline for Benefit Recipients to Add Dependents

Use the IRS Non-filer tool to submit dependent info by



to get the additional EIP this year.

EIPs: Your Role

How Can You Engage in This Effort?

There are three roles:

1. Notifiers
2. Referrers
3. Assisters



Tools to Help You Help Others

Caseworker assets are available to download at:

<https://www.cbpp.org/stimulus-payments-outreach-research>

Caseworker Scripts

 [Caseworker FAQs →](#)

 [Caseworker Scripts for Assisters →](#)

 [Caseworker Scripts for Notifiers →](#)

 [Caseworker Scripts to Refer →](#)

EIPs: Outreach Toolkit

Outreach Toolkit

www.cbpp.org/stimulus-payments-outreach-research

Resources to Support State Outreach to Non-Filers Eligible for Stimulus Payments

About 12 million Americans risk missing out on the stimulus payments provided through the recent CARES Act because they, unlike millions of people who are receiving the payments automatically from the IRS, must file a form by October 15 to receive it this year, or file a 2020 tax return next year to receive it in 2021. This group includes very low-income families with children, people who have been disconnected from work opportunities for a long period, and many low-income adults not raising children in their home.

Governors and other state officials can play a vital role in reaching the 12 million eligible people, up to 9 million of whom – roughly 3 in 4 participate in SNAP or Medicaid. They can also play a role in reaching the other 3 million eligible people, who generally do not receive state or federal benefits. Public education efforts and partnerships with key stakeholder groups, such as service providers for people experiencing homelessness, will be critical to connecting people to the \$1,200 payments.

These resources can help support state outreach efforts.

CBPP Analysis



POLICY BRIEF
State Outreach Can Get Stimulus Payments to as Many Eligible Residents as Possible
JULY 16, 2020



REPORT
Aggressive Outreach Can Help Connect Medicaid Enrollees With Federal Economic Impact Payments
JUNE 22, 2020 | JENNIFER WAGNER



REPORT
State SNAP Agencies Can Help Connect SNAP Households With Federal Economic Impact Payments
JUNE 18, 2020 | STACY DEAN AND BRYNN KETH-JENNINGS



REPORT
State TANF Agencies Can Help Connect TANF Households With Federal Economic Impact Payments
JUNE 18, 2020 | LIZ SCHOTT



REPORT
Aggressive State Outreach Can Help Reach the 12 Million Non-Filers Eligible for Stimulus Payments
JUNE 22, 2020 | CHUCK NABE, KRIS COLE, KATHLEEN BRYANT, STACY DEAN, RORY CAINES, AND ARLDC SHERMAN

Toolkit: Resources to Support State Agency Outreach to Eligible Individuals

- [Sample Campaign Slide](#) —
- [Sample Campaign Plan](#) —
- [FAQ \(English —\) \(Spanish —\)](#)
- [Messaging \(English —\) \(Spanish —\)](#)

Social Media Assets

Sample Social Media and Shareable Graphics

Below are sample social media posts and downloadable social media graphics. Click on a graphic to download it.

English

Español

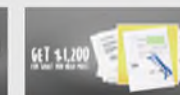
Twitter



✓ Your \$1,200 stimulus check could become cash in your pocket for groceries and more. Sign up for your economic impact payment now at [IRS.gov/EIP](https://www.irs.gov/eip).



✓ Your \$1,200 stimulus check could pay for urgent car repairs. Sign up for your economic impact payment now at [IRS.gov/EIP](https://www.irs.gov/eip).



✓ Your \$1,200 stimulus check could go toward credit card bills or rent. Sign up for your economic impact payment now at [IRS.gov/EIP](https://www.irs.gov/eip).

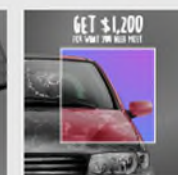
- ✓ You may be eligible for a \$1,200 stimulus check from the federal government. Payments start at \$1,200 and increase by \$500 for each eligible child. Sign up at [IRS.gov/EIP](https://www.irs.gov/eip). #COVIDreliefIRS #WhatYouNeedMost
- ✓ A \$1,200 #EconomicImpactPayment from the federal government could help cover bills and expenses during these tough times. Sign up to receive your payment at [IRS.gov/EIP](https://www.irs.gov/eip). #CARESEAct #COVIDreliefIRS #WhatYouNeedMost
- ✓ Get \$1,200 for #WhatYouNeedMost. To sign up for your economic impact payment, go to the "Non-Filers" page on the [IRS.gov/EIP](https://www.irs.gov/eip) website and scroll down to the blue "Enter Your Information" button. #COVIDreliefIRS #StimulusCheck

Hashtags

Facebook and Instagram



Your \$1,200 stimulus check could become cash in your pocket for groceries and more. Sign up for your economic impact payment now at [IRS.gov/EIP](https://www.irs.gov/eip).



Your \$1,200 stimulus check could pay for urgent car repairs. Sign up for your economic impact payment now at [IRS.gov/EIP](https://www.irs.gov/eip).




Your \$1,200 stimulus check could go toward credit card bills or rent. Sign up for your economic impact payment now at [IRS.gov/EIP](https://www.irs.gov/eip).

Sample Social Posts

Health Department
Today at 19:33 · 🌐

Your \$1,200 stimulus check could pay for urgent car repairs. Sign up for your economic impact payment now at [IRS.gov/EIP](https://www.irs.gov/eip).



GET \$1,200
FOR WHAT YOU NEED MOST.

Like Comment Share

1,035

Write something...

Department of Human Services
Today at 19:33 · 🌐

Your \$1,200 stimulus check could go toward credit card bills or rent. Sign up for your economic impact payment now at [IRS.gov/EIP](https://www.irs.gov/eip).



GET \$1,200
FOR WHAT YOU NEED MOST.


Like Comment Share

1,035

Write something...

State Example
Today at 19:33 · 🌐

Your \$1,200 stimulus check could become cash in your pocket for groceries and more. Sign up for your economic impact payment now at [IRS.gov/EIP](https://www.irs.gov/eip).



GET \$1,200
FOR WHAT YOU NEED MOST.

Like Comment Share

1,035

Write something...

Outreach Toolkit

- Launch event
- FAQs
- Talking points
- Flyer and one-pager
- Template web copy
- Template e-newsletter copy
- Template email copy
- SMS copy
- Mailer copy
- Template op-ed
- Template news release
- Caseworker FAQs
- Caseworker Scripts for Notifiers
- Caseworker Scripts for Referrers
- Caseworker Scripts for Assisters
- Radio reader
- PSA script
- Radio spot
- Videos (:30 and :15)
- Animated digital banner
- Social graphics/posts

EIPs: Additional Tools

EIP Outreach Materials Hub

MATERIALS:

[Stimulus Payments Outreach Resources](https://eitcoutreach.org/coronavirus) – eitcoutreach.org/coronavirus

GETTING STARTED:

[Getting Started with Economic Impact Payments Outreach](#)

FLYERS IN 5 LANGUAGES:

[8.5 x 11 Stimulus Payments Informational Flyer](#)

GUIDE TO Fill OUT THE IRS NON-FILER FORM GUIDE:

[How to Fill Out the IRS Non-Filer Form](#)

SEND PEOPLE HERE:

[Get Your Stimulus Check from the IRS](https://eitcoutreach.org/stimulus) – eitcoutreach.org/stimulus

FAQs:

[What to know about the Economic Impact Payments \(Stimulus Checks\)](https://eitcoutreach.org/stimulusfaq) – eitcoutreach.org/stimulusfaq

Sample social media graphics and posts, press release, blog template, talking points and more are also available on the website.

Stimulus Payments Outreach Resources

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


Did you know that [millions of eligible people could miss out on their Economic Impact Payments \(EIP\)](#) – commonly called “stimulus checks” – because they have to file an online form with the IRS to get it? While most people get their payments automatically after filing a tax return (or based on participation in certain federally administered programs), this group of “non-filers” must take action to get their money (worth \$1,200 for adults and \$500 for qualifying children).


Eligible individuals have until **October 15th** to file for their EIP this year, so there's a lot of work to do to get the word out. (People who miss this deadline can also file a 2020 tax return next year to receive the payment in 2021.)

Will you join efforts to help leverage the estimated \$12 billion EIPs available for 12 million eligible people?

EIP OUTREACH QUICK-START GUIDE

KEY INFO

 **October 15th**
Deadline to receive the payment in 2020

 Direct people to:
eitcouthreach.org/stimulus

Get started with the
[Quick Start Guide](#)

Individual Outreach Materials

Background

[Quick-start guide](#)

Get started with EIP outreach

[FAQ](#)

More information for advocates about stimulus payments

[Non-filer Form](#)

How to Fill out the IRS Non-Filer Form

[Virtual Training](#)

Kick-start your outreach with this recorded webinar

Outreach toolkit:

Use these resources to jump-start your outreach.

- [8.5x11 Informational Flyer](#)
- [Social Media](#) (graphics and posts)
- [Press Release Template](#)
- [Blog Template](#)
- [Sample Website Text](#)
- [Talking Points](#)
- [Email Templates](#)

 Direct people to:
eitcouthreach.org/stimulus

State Agency Outreach

- How [states](#) can help people get payments
- How [state TANF agencies](#) can help
- How [state Medicaid agencies](#) can help
- How [state SNAP agencies](#) can help

Outreach toolkit for state agencies

This [toolkit](#) includes a sample outreach campaign plan, messaging, social media, videos, and more!

Get Your Stimulus Check from the IRS

Economic Impact Payments, or "Stimulus Checks" help reduce the financial burden of COVID-19

eitc outreach.org/stimulus

Am I eligible?

You are eligible if:

- 1 Your income is under \$75,000 (single or married filing separately) or \$150,000 (married filing jointly). You also qualify if you have no income.
- 2 You and your spouse, if filing jointly, each have a valid Social Security number (one if military).
- 3 Someone else cannot claim you as a dependent on their tax return.

How do I get the payment?

You can check on the status of your payment on irs.gov/GetMyPayment.

Do nothing if you:

- Already filed taxes for 2018 or 2019; OR
- Receive Social Security, Social Security Disability Insurance (SSDI), or Supplemental Security Insurance (SSI); OR
- Are a railroad retiree or Veterans Affairs (VA) beneficiary.

The IRS will send your payment by direct deposit or mail. You will get a letter from the IRS stating when the payment was made and how.

Complete an Online Form if you:

- Earned less than \$12,200 (\$24,400 if married) in 2019*; AND
- Are not required to file a tax return; AND
- Don't plan on filing.

Go to www.irs.gov/eip and click the button for non-filers

Complete the form by October 15 so the IRS knows where to send your payment.

File your taxes now if you:

- Earned more than \$12,200 (\$24,400 if married) in 2019.

How to file for free by October 15:

Virtual Tax Prep

If you have access to a mobile phone or a computer connected to the internet, you can get help to file your federal and state taxes. Go to GetYourRefund.org.

Do-It-Yourself Taxes

File your own taxes at MyFreeTaxes.com or irs.gov/FreeFile.

Volunteer Income Tax Assistance (VITA)

While many sites are closed, some offer drop-off or virtual help. Find your local VITA site to call: irs.treasury.gov/freetaxprep/.

*If you had any earnings in 2019, you may qualify for other refunds. File your 2019 taxes to apply for the stimulus payment and claim any additional qualifying credits.

Beware of scams

The IRS will NOT contact you by phone, email, text message, or social media to request personal information – especially banking details – or ask you to provide a "processing" fee. The IRS will send written correspondence.

The IRS refers to this money as an "Economic Impact Payment." Communications that use phrases like "stimulus check" or "recovery rebate" probably aren't from the IRS.

THE DETAILS

► Direct Deposit

If you don't have a bank account, the IRS will mail you a paper check, but it will take much longer. If you don't have a bank account, you can still get direct deposit by entering an account and routing number. You can find these numbers with:

- **Prepaid debit card** - Once you get a card, you may need to contact the company directly to find the account and routing numbers needed for direct deposit.
- **Payment apps** - CashApp, Venmo, and PayPal now offer account and routing numbers you can use for direct deposit.

► Address Changes

If you have moved since filing a 2019 tax return, update your address at your local post office or moversguide.usps.com.

If you don't have a permanent mailing address, you can ask to use the address of a family member, friend, or a place you go to for services (such as like a health care clinic, drop-in day center, shelter, community action agency, or church).

► Self Employment/ Gig Work

If you made over \$400 in self-employment income in 2019, you must file a tax return. Your stimulus payment will not be reduced if you haven't paid self-employment taxes. You may be charged late fees by the IRS if you don't pay taxes by July 15.

► Immigrants

If you're married and filing jointly with your spouse, both spouses must have a Social Security Number (not an ITIN) to receive the payment. If your children do not have a Social Security Number (SSN), it does not affect your \$2,400 payment, but you will not receive a \$500 payment for them.

If you're married and filing separately from your spouse and one of you has an SSN and one of you has an ITIN, the spouse with an ITIN is not eligible and the spouse with an SSN is eligible for \$1,200.

If neither you nor your spouse has an SSN, you cannot get a \$500 payment for your children even if they have SSNs.

QUICK TIPS

KIDS

You'll get \$500 for every dependent child under 17 who has an SSN or Adoption Taxpayer Identification Number (ATIN).

PAPER RETURNS

The IRS is not currently processing paper returns. If you don't have internet access, get help to file electronically.

CHILD SUPPORT

If you are overdue on child support, your Economic Impact Payment could be reduced or eliminated.

BACK TAXES & STUDENT LOAN DEBT

Your payment will not be interrupted and you will receive the full amount.

BENEFITS

Your payment won't reduce the benefits you receive from SNAP, TANF, Medicaid, federal rental assistance, or another program. It will not affect unemployment payments.

For help with health coverage go to healthcare.gov.

TAXES

Payments are not taxed.

eitc outreach.org/stimulus

Get Your Stimulus Check from the IRS

Economic Impact Payments, or "Stimulus Checks" help reduce the financial burden of COVID-19



You are eligible for the \$1,200 payment if:

1. Your income is under \$75,000 (single, or married filing separately) or \$150,000 (married filing jointly). You also qualify if you have no income.
2. You and your spouse, if filing jointly, each have a valid Social Security number (one if military).
3. Someone else cannot claim you as a dependent on their tax return.

Stimulus Check Eligibility

You'll automatically receive a check (no action needed) if you:

1. You already filed taxes for 2018 or 2019 **OR**
2. You receive Social Security, including Social Security Disability Insurance (SSDI), or Supplemental Security Insurance (SSI) **OR**
3. You are a railroad retiree or Veterans Affairs (VA)



www.eitcoutreach.org/stimulus

Help from Other Organizations

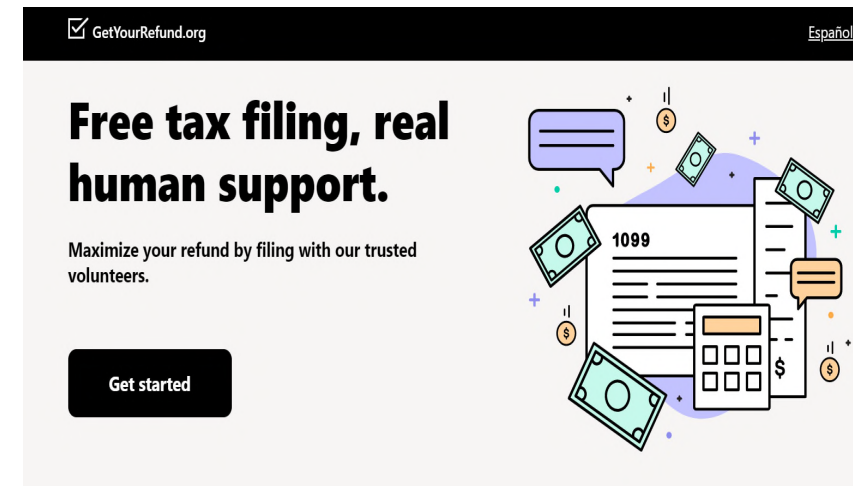
United Way's 211 Economic Impact Payment Helpline

- (844) 322-3639
- Operates 24/7 with live agents available 10:00 AM–6:00 PM ET M-F through October 15, 2020.



GetYourRefund.org

- A mobile-friendly website that helps individuals decide whether they would benefit from filing a full tax return or just signing up for the stimulus payment.
- Clients can chat with a VITA-certified tax preparer to discuss their options and help them complete the process.
- The website will be available through October 15, 2020.



Help from Other Organizations

Bank On's Guidance on Opening Online Bank Accounts

- <https://covidbanking.joinbankon.org>
- Learn the process and requirements to safely open an online account.
- Choose from accounts offered by financial institutions that meet national standards.



Angel Resource Connection's Trainings on Completing the IRS Non-filer Form

- www.angelresourceconnection.org
- Join a training to walk through the process to complete the IRS Non-Filer Form. This may be useful for any organization serving in the Assister role.



IRS Resources

IRS Economic Impact Payment Information Center:

<https://www.irs.gov/coronavirus/economic-impact-payment-information-center>

IRS tool to check the status of payment delivery:

<https://www.irs.gov/getmypayment>

Volunteer Income Tax Assistance (VITA) site locator (some sites may offer help for non-filers to sign up for their EIPs):

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

IRS EIP Hotline:

1-800-919-9835

Live agents are available 7:00 AM–10:00 PM ET M-F

Thank You!

Thank you for doing your part in helping low-income individuals access the stimulus payments for which they are eligible.

Contact Info

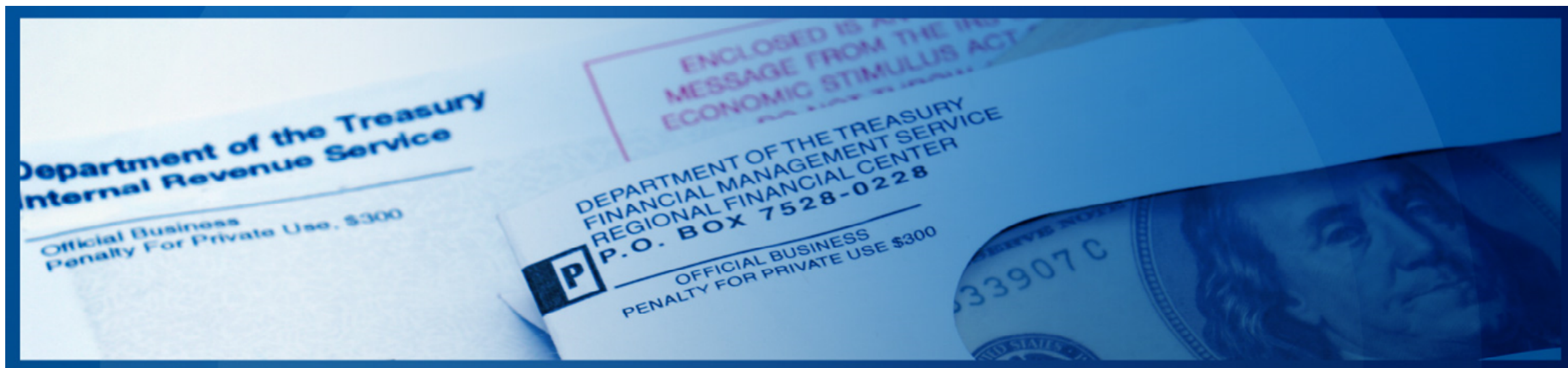
Get It Back Campaign

Center on Budget and Policy Priorities

eitcoutreach@cbpp.org

(202) 408-1080

www.eitcoutreach.org



211 Economic Impact Payment Helpline

Bryndan Stueve
Manager, Community Impact and Economic Mobility
United Way Worldwide

GET CONNECTED.
GET HELP.

211

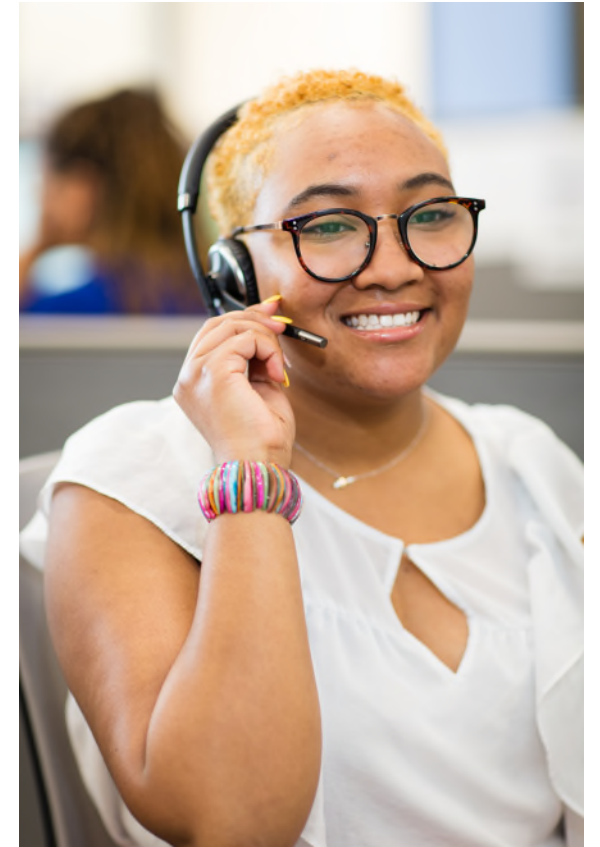
What is 211?

211 is a vital community service accessed by millions of Americans every year.

People call 211 for free, confidential help with a wide range of social services and resources, including **food, housing, utilities payment assistance, health care, transportation, child care, employment opportunities, mental health crises, disaster information and assistance**, and more.

Highly trained 211 specialists provide **expert, caring help** that addresses not only the presenting issue but underlying challenges people are facing as well. Collectively, 211s curate databases of over **950,000** programs and services nationwide.

Ensuring that people in need have access to 211 is critical to United Way's mission to fight for the health, education, and financial stability of every person in every community.



211 Economic Impact Payment Helpline



United Way established our 211 Economic Impact Payment Helpline to provide over-the-phone assistance to anyone who needs help obtaining their Payment.

The Helpline helps callers:

- Confirm they are eligible
- Learn how to claim their EIP
- Feel confident claiming their EIP
- Successfully complete the IRS' forms
- Answer specific EIP questions

211 Economic Impact Payment Helpline



211 EIP Helpline agents have obtained Advanced VITA certifications, and are adept at responding to technical questions and guiding callers in the use of software products and webforms using all device types (computer, tablet, mobile).

Callers are also screened for EITC/CTC eligibility, and referred to VITA services or self-prep tax filing as needed.

211 Economic Impact Payment Helpline



Calling **1-844-322-3639** connects people to the national Helpline.

First, an interactive voice response (IVR) “bot” answers the most frequently asked questions, recognizing “plain language” speech.

For example:

- *Am I eligible to receive a payment?*
- *I moved, how will the IRS know where to send my check?*
- *When will I get my check?*

211 Economic Impact Payment Helpline



IVR Welcome:

“Hello, thank you for contacting the 211 Helpline for Economic Impact Payments.

“First, please enter your zip code.

“Thank you. I am an automated agent that can answer many of your questions about your Economic Impact Payment.

“If I can’t answer your question, I will connect you to someone who can help.

“Go ahead and ask your question. You can say things like, ‘Am I eligible?’”

211 Economic Impact Payment Helpline



If the IVR doesn't understand a caller's question or the caller still needs help, they will be transferred to a live agent for in-depth assistance.

- 90% of calls are answered within 90 seconds

The Helpline IVR is available 24/7. Live agents are available 10 am – 6 pm ET M-F through October 15, 2020.

After-hours callers can receive a callback the next day. Live agent hours can be expanded to meet demand.

GET CONNECTED.
GET HELP.

211

211 Economic Impact Payment Helpline



If the caller needs help with other COVID-19 or income supports questions, they will be transferred to the main COVID-19 helpline and, ultimately, their local 211

211 Economic Impact Payment Helpline



Helpline Promotion

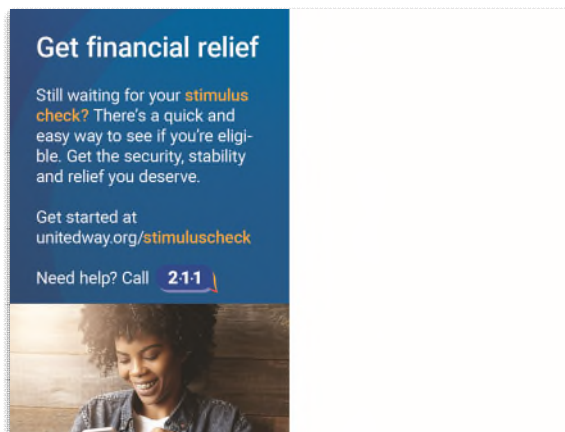
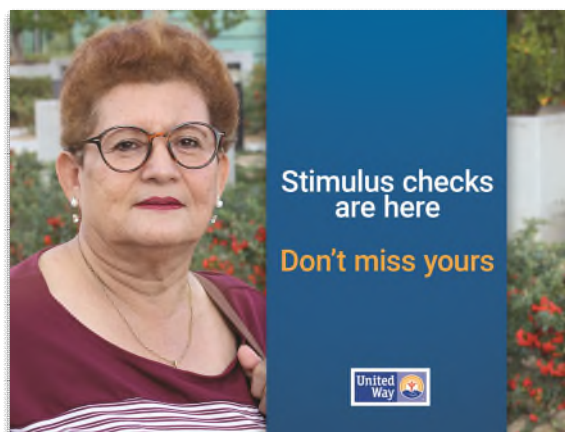
- List the 211 EIP Helpline phone number in your outreach and information materials: **1-844-322-3639**
- Link to United Way's EIP webpage: www.unitedway.org/stimuluscheck
- Share this resource freely with your clients, staff, and partners
- Unsure where to start? Review our [Outreach Toolkit](#) for sample outreach materials including postcards, emails, and social media posts

GET CONNECTED.
GET HELP.

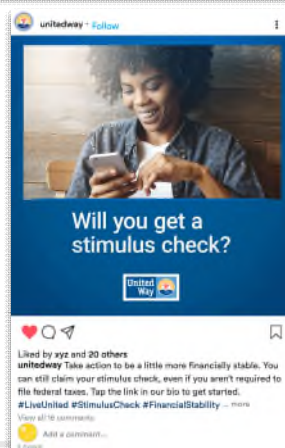
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Economic Impact Payment Outreach Toolkit

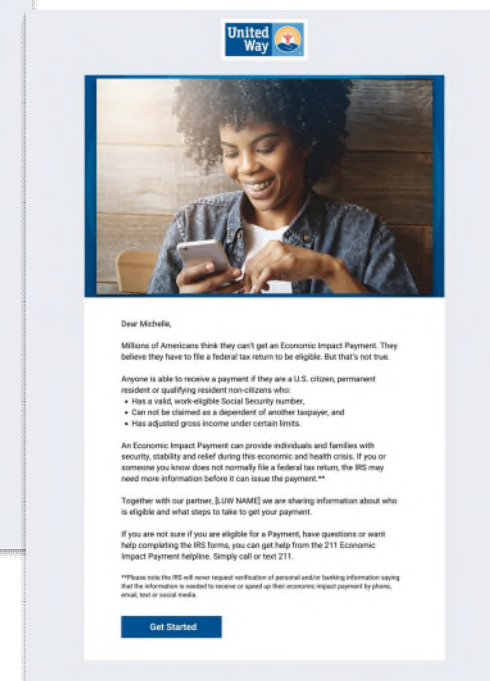
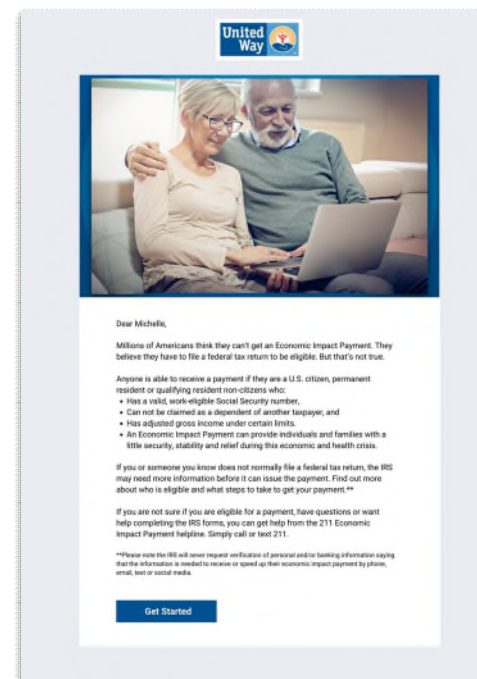
Postcard



Social



Email



GET CONNECTED.
GET HELP.

211

211 Economic Impact Payment Webpage

211.org

- General COVID-19 information and resources
- Economic Impact Payment page with additional FAQs
- Ability to search for and contact your local 211

www.unitedway.org/stimuluscheck



Economic Impact Payment Learnings

Key Learnings

- People are looking for good Economic Impact Payment information
 - 24MM+ impressions in 3 weeks
 - 50k+ page views per week
 - Outreach efforts are exceeding industry benchmarks
- “Stimulus Check” language performs better than “Economic Impact Payment”

GET CONNECTED.
GET HELP.

211

211 Economic Impact Payment Helpline

Thank you!

Please contact me with your questions, comments, and suggestions, or to let me know how you're incorporating the 211 Economic Impact Payment Helpline into your outreach efforts.

Contact:

Bryndan Stueve
Manager, Community Impact and Economic Mobility
United Way Worldwide
bryndan.stueve@uww.unitedway.org



OFFICE OF PUBLIC & INDIAN HOUSING

Questions?

Please enter them in the chat box

Thank you for joining us!

RESOURCE LINKS:

- www.eitcoutreach.org/coronavirus
- www.unitedway.org/stimuluscheck
- Marketing Materials: [Partner Package](#)
- [PIH Eviction Prevention and Stability Toolkit](#)

NOTE: The slide deck and a recording link will be sent out to attendees later this week