Helping Tenants Access Their Economic Impact Payments

August 26, 2020
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Economic Impact Payments (EIP)

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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?

- 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

• Some may be eligible for other tax credits and may want to file a 2019 tax return to get even more money.
  o 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?

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 October 15 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 September 30 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
Sample Social Posts

**Health Department**
Your $1,200 stimulus check could pay for urgent car repairs. Sign up for your economic impact payment now at IRS.gov/EIP.

**Department of Human Services**
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.

**State Example**
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.
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 – 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 – eitcoutreach.org/stimulus

FAQs:
What to know about the Economic Impact Payments (Stimulus Checks) – 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

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?

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

**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!

**KEY INFO**
- October 15th
  - Deadline to receive the payment in 2020
  - Direct people to: eitcoutreach.org/stimulus
  - Get started with the Quick Start Guide

[www.eitcoutreach.org/coronavirus](http://www.eitcoutreach.org/coronavirus)
Get Your Stimulus Check from the IRS

Economic Impact Payments, or “Stimulus Checks” help reduce the financial burden of COVID-19
citoutreach.org/stimulus

Am I eligible?
You are eligible if:
1. Your income is under $7,500 (single) or $15,000 (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 OR
- Are not required to file a tax return.

Don’t plan on filing.
Go to www.irs.gov/help 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 computer connected to the internet, you can get help to file your federal and state taxes. Go to FreeTaxUSA.com.
Do It Yourself Taxes
File your own taxes at MyFreeTaxes.com or IRS.gov/freefile.

Volunteer Income Tax Assistance (VITA)
Whitepages.org offers online services offering drop-in or virtual help. Find your local VITA site at call-increasing-pot/freenaps.org.

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 “economic stimulus” 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:
- Preparer ledger 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 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 usingguidewage.kpp.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 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 $2,000 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 a SSN and one of you has an ITIN, the spouse with an ITIN
is not eligible and the spouse with a 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.

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 still reviewing 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 intercepted 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.

8.5 x 11 Stimulus Payments Informational Flyer
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 (joint or married filing jointly). You also qualify if you have no income.
2. You and your spouse, if married 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:
2. You receive Social Security, including Social Security Disability Insurance (SSDI), or Supplemental Security Income (SSI).
3. You are a railroad retired or survivor (Railroad Retirement).
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](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](http://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 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 for doing your part in helping low-income individuals access the stimulus payments for which they are eligible.
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
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United Way Worldwide
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.
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.
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](http://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
**Economic Impact Payment Outreach Toolkit**

**Postcard**

Stimulus checks are here
Don't miss yours

**Social**

United Way
Yesterday at 4:43 PM
People who live on lower incomes who aren't required to file a tax return often believe they don't qualify for a stimulus check. But United Way FirstNet and their network partners help spread the word about how they can get credit for their taxes. TAP to learn more

Don't miss yours

Economic Impact Payments are here

Will you get a stimulus check?

**Email**

Economic Impact Payments are here

Get financial relief

Still waiting for your stimulus check? There's a quick and easy way to see if you're eligible. Get the security, stability and relief you deserve.

Get started at unitedway.org/stimulucheck

Need help? Call 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”
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
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United Way Worldwide
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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