

Outreach Partnerships with GetCTC.org

Help Families in Your Community Access
the Child Tax Credit and other Tax Benefits

Human Services Agency
Partnership Guide
May 2022

CODE *for*
AMERICA

Tax Benefits Outreach: Quick Guide

GetCTC, Code for America's simplified tax filing tool—launched in collaboration with the White House and U.S. Department of the Treasury—allows families with low income to claim the Child Tax Credit and missing stimulus payments quickly and easily. Most clients complete the process in 10-15 minutes without assistance. GetCTC is available for free in English and Spanish at www.GetCTC.org until mid-November.

Take action in a few simple steps:

1. (Optional) Consult with us!

Talk to Code for America about your outreach plans, discuss strategies based on your available resources/ needs, and any questions you may have. Schedule 1:1 time with us [here](#), [sign up for our open office hours](#), or email us at outreach@getyourrefund.org.

2. Claim a unique url.

Through early November, refer clients to www.childtaxcredit.gov or to www.GetCTC.org. If you use a unique url, we can provide you aggregate data on the impact of your outreach. Fill out [this short form](#) to claim a unique url on GetCTC.org. Contact us regarding unique urls on childtaxcredit.gov.

3. Start sending messages!

Use **existing modes of communication** with your clients to conduct outreach. If you can text, text! See the next page for sample language, as well as critical do's and don'ts. Consider a series of at least 3 outreach messages — more messages clearly lead to more impact in this work.

4: Tell us about it.

Tell us what you've done using [this form](#). We'll use the information to update our research and best practices, and may highlight your outreach as an example for others on [our website](#) via the map and message count.

5: Track your progress.

Code for America makes detailed dashboards available to partners. Write outreach@codeforamerica.org or [request a unique url](#) to get access to the dashboards.

Why do tax benefits outreach?

- Federal tax benefits for individuals and families with low income in 2022 can amount to life-changing amounts of money. **A family of four with low income who didn't file last year could claim \$20,000 in tax benefits**, including the Child Tax Credit, stimulus payments, and the Earned Income Tax Credit.
- **Millions of people could miss out** on the benefits they deserve, simply because they don't file taxes.
- **It isn't too late to help people file.** Individuals and families eligible for a refund can file without penalty for up to three years after the original filing deadline in April. Filing help is available until mid-November.
- **Public benefits agencies are proven to be the best outreach messengers for tax benefits.** [Our research last year](#) shows that households with low income trust public benefits agencies. A single statewide text message to SNAP beneficiaries, for example, can lead 1,000 households to claim their tax benefits. **If a text message costs 1 cent to send, it could have an ROI of about 1,000x for your state.**

Messaging

DO	DON'T
<ul style="list-style-type: none">● Identify your agency in the message. Beneficiaries trust your agency and need to know this is coming from you.● Include a link to childtaxcredit.gov or GetCTC.org in the initial message. Your beneficiaries need a clear call to action.● Consider including language stressing these are credits your audience deserves; these benefits belong to them.● Note that these funds do not count toward most public benefits programs and are safe for immigrants to get.● Consider highlighting that this is only for those who have not yet filed taxes this year.● If applicable, you can include an offer of local assistance along with a link to GetCTC—but not instead. Many clients can use GetCTC themselves, and help can become a bottleneck.	<ul style="list-style-type: none">● Make messages too long, or bury the ask—especially in emails. Get to the point.● Overthink your messages. Just be clear and concise.● Sound 'scammy.' Messages that sound “too good to be true” may be ignored.● Refer to monthly payments of the Child Tax Credit — this messaging performed well last year, but there are no more monthly payments this year.● Use jargon like “credit” or “refund” or even “tax,” if you can avoid it. (Try “payments” instead of “credits.”)

Send *direct* messages to your beneficiaries, using any tools you have. Research suggests that repeated messages are effective. We encourage you to use as many mediums as you can, and send multiple messages — at least one a month — through November. We recommend, in order:

1. Text messages
2. Prominent links in online benefit portals
3. Emails
4. Mailed letters (including flyer s/ mentions in existing notices, like Summer P-EBT)
5. Robocalls
6. Banners on state websites
7. Staff guidance / call center scripts
8. Call center hold messages

Although we don't discourage posting on social media, these posts and other public announcements are not nearly as effective as direct messages.

Sample text messages

Hi [first-name], this is [sender-first-name] from [agency]. If you didn't file taxes this year, you may be eligible for thousands of dollars in federal benefits. It's easy to claim your money. This money does not count for [SNAP] benefits. Visit [childtaxcredit.gov/\[state\]](http://childtaxcredit.gov/[state]).

This is your [agency name]. New federal benefits for kids are providing households like yours up to \$3,600 per child, even if you earn little or no income. Claim your money at [getctc.org/\[state\]](http://getctc.org/[state]).

Hi [first-name], this is the [agency name]. The expanded Child Tax Credit is worth up to \$3,600 per child, even if you don't usually file taxes, or if you earn little or no income. It's easy to claim your money at [childtaxcredit.gov/\[state\]](http://childtaxcredit.gov/[state])

Additional sample messages for email, robocalls, and other formats can be found in the [Center on Budget and Policy Priorities CTC Messaging Toolkit](#).

Tax Benefits Outreach: FAQs

1. Taxes, Tax Benefits, and Tax Filing

[Why are so many families with low income missing out on tax benefits?](#)

[What is simplified filing? Which credits can be claimed at GetCTC.org?](#)

[What about the EITC? What about state tax credits? What about the other stimulus payments?](#)

[What services are available for clients who want to file a full return?](#)

[Can my local VITA organization count GetCTC.org referrals/assistance toward their IRS grant deliverables?](#)

[Who are we trying to reach?](#)

[Who can still file after the April 18 deadline?](#)

2. Benefits Agencies and Tax Outreach

[What is the research on outreach by benefits agencies?](#)

[Have other states done this outreach? How did it go?](#)

[What other resources are available for human services agencies interested in this work?](#)

3. Outreach Nuts and Bolts

[My agency doesn't have tax expertise. What do we do if people have questions?](#)

[Should I do a data match with my state revenue agency to identify non-filers?](#)

[What are the different landing pages I can send my beneficiaries to? What data can you share with me about the families I refer?](#)

[Can you help me conduct an outreach experiment?](#)

[What data can you share with me about the families I refer to GetCTC.org?](#)

[I'd like to send text messages to my beneficiaries, but we don't have the technology for this. How are other states doing it?](#)

[How can I get funding for these messages? Can I use American Rescue Plan \(ARP\) state and local funds?](#)

[What mediums can I use to reach beneficiaries? Can I email? Can I call?](#)

4. Campaign Details

[Who is running this campaign and why?](#)

[What shows up on the outreach map?](#)

1. Taxes, Tax Benefits, and Tax Filing

Why are so many families with low income missing out on tax benefits?

The expanded Child Tax Credit (CTC), delivered monthly to families from July to December of 2021, helped [nearly 40 million families](#) pay for their most urgent needs. These monthly payments were advances, totaling one half of the 2021 CTC. In order for families to receive the second half of their 2021 CTC—or the full amount if they did not receive monthly payments last year—they will need to file a 2021 tax return this year. Unfortunately, many of the families with low income who are most in need of these benefits are missing out because the process of filing a tax return is overly difficult, and families struggle to connect with the free, trustworthy, clarifying, and accessible services they need to file a return. Even if they are able to find high-quality support, many families are unable to file a full return because they are missing key documents, such as W2s, 1099s, or documents needed to prove their identity. As a result, an estimated 4 million families are at risk of missing out on their tax benefits. Simplified filing can help these families access the benefits that they deserve.

What is simplified filing? Which credits can be claimed at GetCTC.org?

Each year since 2020, the IRS has authorized a simplified filing process, which allows families who aren't required to file taxes—generally those who earn less than \$12,500 single or \$25,000 married—to claim key tax benefits. In response, Code for America built GetCTC.org, a user- and mobile-friendly tool available in English and Spanish that allows families to file a simplified tax return directly with the IRS. GetCTC.org does not require most clients to submit any documents, which we know can be a major barrier for new and lapsed filers.

After GetCTC.org's launch in September 2021, over 115,000 families successfully filed returns using GetCTC in just 10 weeks, claiming an estimated \$440 million. Most importantly, GetCTC reached the clients who needed it most; according to a survey of more than 12,000 clients, 24% had never filed taxes in their lives and over half were people of color. A typical client used GetCTC on a mobile phone and got a notification of IRS acceptance just 10 minutes after starting their return—and over 99% of clients got through the tool without requiring live chat assistance. [Read more about last year's experience with GetCTC.](#) The importance of simplified filing can't be overstated: with its implementation, the families who have the greatest need for tax benefits have been able to claim them in record numbers.

This year, GetCTC.org launches in mid-May, and provides access to the Child Tax Credit and any missing third stimulus payment (EIP3). Clients who received CTC advance payments last year will receive the other half of the credit using GetCTC; clients who did not receive advance payments will get the whole credit from filing. Clients using GetCTC see a clear warning about this limitation, and are offered the option to visit [GetYourRefund.org](#) to file a full return if they want to claim other credits.

What about the EITC? What about state tax credits? What about the other stimulus payments?

By law, simplified filing unfortunately only provides families access to the Child Tax Credit and the third stimulus payment. Families using GetCTC see a clear warning about this limitation, and are offered the option to visit

GetYourRefund.org to file a full return. For families with zero or near-zero income, these are usually all the credits they are eligible for.

Some families with low income could be eligible for other credits if they file a full return. But we see from our research that families with low income who have not filed tax returns by the middle of the year typically face significant barriers to filing a full return. While we want families to get all the money they can, we feel that we must not let the perfect be the enemy of the good. Several years of experience doing this work have taught us that when families facing high barriers are asked to file a full return, they often get stuck in the process and end up getting nothing at all.

To claim the EITC, families have to file a full federal tax return, which they can do on GetYourRefund, or through other traditional filing services. Code for America is exploring adding EITC functionality to GetCTC, but this will not be available until later in the summer at the earliest.

To claim state tax credits, families have to file state returns, which usually means they have to file a full traditional federal return first. They can do this on GetYourRefund, or through other traditional filing services.

To claim the first and second stimulus payments, which were technically advances on 2020 taxes, families have to file 2020 tax returns, which they can do on GetYourRefund, or through other traditional filing services.

See [Appendix A](#) and [Appendix B](#) for more details on which benefits can be claimed via simplified filing versus filing a full return.

What services are available for clients who want to file a full return?

Since simplified filing only allows clients to claim some of their benefits, all clients who visit GetCTC.org are offered the opportunity to visit our other website, GetYourRefund.org, where they can choose one of our 3 Volunteer Income Tax Assistance (VITA) -based services to help them file a full return. These services will remain available through October, although most have extremely limited capacity after April 18.

- **File Myself** (Free DIY Tax Software): GetYourRefund refers clients to TaxSlayer free tax filing software that they can use to prepare their own federal and state returns. Clients can use GetYourRefund chat support to get help while completing their return. This service is also known as Facilitated Self Assistance or FSA, and it is the same process that MyFreeTaxes.com offers. This option is available to families making less than \$73,000 a year. Most clients arriving at GetYourRefund will be referred to this option, since it has broad eligibility and can handle significant capacity. File Myself will be open until October 15.
- **GetYourRefund** (Full-service virtual assistance by Volunteer Income Tax Assistance (VITA) partners): Clients provide basic information and upload pictures of their ID and tax documents—a VITA intake. GetYourRefund then remotely pairs clients with a VITA program to file their state and federal returns. This option is available to families making less than \$66,000 a year. Due to limited VITA capacity after April 18, this service is only available in some regions. GetYourRefund Full Service will be open until October 1.
- **VITA Site Location Finder:** Clients looking for in-person assistance will be directed to our mobile-friendly [VITA site location finder](#). The GetYourRefund team pulls VITA site information directly from the IRS VITA site locator tool and uses it to update our location finder on a weekly basis. All open VITA sites are listed in the location finder, but keep in mind that VITA capacity is extremely limited after April 18.

As always, our client support chat is open to address additional tax benefits related questions. All services provided on GetYourRefund.org are completely free of charge and have received IRS approval.

Can my local VITA organization count GetCTC.org referrals/assistance toward their IRS grant deliverables?

Yes! Many of our human services agency outreach partners already work with their local VITA site on tax benefits outreach. These VITA partners can receive credit against their VITA grant deliverables for the work that they are doing to support clients to use GetCTC.org, as long as they use a unique URL for tracking. Please reach out to navigators@getyourrefund.org for more information.

Who are we trying to reach?

An estimated 4 million families across the country are eligible for and have not yet received the CTC. Here's what we know about them:

- Unserved families are in every city and every state. There is no single geographic area where they are all clustered.
- Many unserved families receive other government benefits—like food stamps, Social Security, or state/local cash assistance—and are concentrated in higher-poverty areas.
- Unserved families are disproportionately likely to be people of color—and very disproportionately likely to be undocumented immigrants. Some evidence suggests they are disproportionately likely to be Spanish speakers.
- Many unserved families have not filed taxes because they think taxes *aren't for them*—that they can't, or shouldn't, file a tax return, usually because they earn little or no money or receive certain federal benefits. They need reassurance that this process is right for them—and that they can do it.

Although most clients do not need assistance filing a return using GetCTC.org, households facing particularly high barriers (such as language or technology barriers, homelessness, or incarceration) may benefit from additional support completing this process. For more information about our navigator program, please visit www.GetCTC.org/Navigators.

Who can still file after the April 18 deadline?

Tax Day has come and gone — but anyone who hasn't yet filed can and should still file.

Households who don't owe any net tax (which includes all households eligible to use GetCTC) face no penalty at all for late filing, and effectively did not face an April 18 deadline. These families can continue to file any time for the next three years without penalty. The overwhelming majority of families missing out on the CTC are in this category. In fact, many of them are not in the habit of filing and may not be accustomed to the idea of an April deadline at all.

A small minority of families with low income who are not eligible to use GetCTC could owe money to the IRS when they file a full return, and will pay a small penalty for filing late. This penalty increases the longer they wait, so the best bet is still to file as soon as possible.

Tax filing services are open this year until the fall:

- File Myself closes October 15.
- GetYourRefund Full Service closes October 1 — though capacity is decreased following April 18.
- GetCTC will likely close in mid-November, depending on the closing date for IRS e-filing.

2. Benefits Agencies and Tax Outreach

What is the research on outreach by benefits agencies?

After the first GetCTC filing season in 2021, Code for America undertook a [large research project](#) to assess what had and hadn't worked, including which outreach strategies had been most effective. This research found that direct messages from benefits agencies (or from the IRS itself) were the single most promising outreach tactic to drive more returns. In general, a well-targeted and well-written text message to public beneficiaries generated one submitted GetCTC return per 200-300 messages sent — meaning one statewide blast in a large state could generate hundreds or thousands of returns.

Have other states done this outreach? How did it go?

Yes, they have, to great success. Last year:

- Massachusetts sent text messages to SNAP and WIC beneficiaries, prompting families to claim nearly \$4 million in tax benefits.
- Virginia sent text messages and emails to certain beneficiaries identified as likely non-filers based on a data match with the state department of revenue, likely prompting families to claim at least \$1 million in tax benefits.
- California sent emails and robocalls to beneficiaries of a wide range of state programs, prompting families to claim at least \$2.5 million in tax benefits.
- Michigan sent text messages to beneficiaries who had used its online benefits portal, prompting families to claim nearly \$1.5 million in tax benefits.

What other resources are available for human services agencies interested in this work?

We have a team of organizations ready to support you to do this work:

- APHSA and NACo have developed an excellent hub of resources for Health and Human Services agencies [here](#).
- The National League of Cities can offer one-on-one assistance and resources to cities interested in conducting outreach. Contact eofe@nlc.org for more information.
- GMMB's [outreach toolkit](#) is also a robust resource for outreach partners of all types.

3. Outreach Nuts and Bolts

My agency doesn't have tax expertise. What do we do if people have questions?

You don't need in-house tax expertise to send tax benefits outreach.

Most clients won't need any assistance at all to use GetCTC. Last year less than 1% of GetCTC users requested any help at all when completing their return. For those that do need assistance, live chat support is available on all pages of GetCTC, and [detailed FAQs are available](#) for common issues.

You could also consider partnering with a local organization that provides tax support to field questions related to your campaign. Reach out to navigators@getyourrefund.org for more information about sites offering assistance in your area.

Should I do a data match with my state revenue agency to identify non-filers?

You can — but it may well be more trouble than it is worth.

Some states have chosen to improve the targeting of their outreach by implementing data sharing arrangements between the Department of Revenue and the Department of Social Services. The services agency sends revenue a list of beneficiaries, and revenue sends back a list of those who have yet to file a state return. This tends to be about a quarter or a third of the list. The services agency then can send outreach to just those non-filers.

It is an elegant strategy, but is probably unnecessary in most states, for several reasons:

- Data sharing arrangements can be costly and timely to implement. Those time and resource costs would be better spent doing more outreach, starting earlier.
- Data matching only makes outreach somewhat more efficient. An outreach campaign using a data-matched list to reach out to 100 families is probably about as efficient as a non-matched list of 200-400 families. Many state beneficiaries have not yet filed, so simply sending messages to the full beneficiary list is already pretty efficient. And in the case of emails or texts, the marginal cost of sending additional messages is low — so cost savings are limited.
- Matches to state tax data are imperfect regardless. Some families will have filed a federal return but not a state return (or vice versa) and will be erroneously included on (or removed from) the data-matched list.
- Messages to families who have already filed might still have value. Families who already filed still might know friends or family who did not — and could be prompted to remind them to file.

What are the different landing pages I can send my beneficiaries to? What data can you share with me about the families I refer?

The most important aspect of your outreach campaign is the landing page you send your beneficiaries to. Many recipients will just click the link in your message. What matters is what they find there.

There are a few key factors to consider when choosing your landing page for outreach.

- **Recognition:** As a general rule, a .gov website is more likely to be recognized than a .org. This is especially important if you are doing unsolicited outreach via a communications channel that you do not typically use with clients. For example, an unexpected text message likely benefits more from a .gov referral than a flyer provided by a case manager in person.
- **Impact tracking:** We know that being able to track the results of outreach campaigns can help partners make the case for this important work. We encourage all of our outreach partners to [request a unique URL](#) (that is, [GetCTC.org/yourcampaign](#) — e.g. [GetCTC.org/topeka](#), [GetCTC.org/dcschools-email](#), [GetCTC.org/midhhs2](#), etc.), which will allow us to report basic outcome metrics (home page visits, returns started, returns accepted over time, estimated dollars delivered, etc.) for families accessing GetCTC or GetYourRefund via that URL. Metrics are viewable on an online partner dashboard. You can also view outcome metrics by zip code or collection of zip codes. You can request an unlimited number of unique urls for the purposes of comparing multiple outreach strategies against one another, or conducting A/B tests. State agencies and large cities can also request a limited number of unique tracking URLs for ChildTaxCredit.gov. Contact us at outreach@getyourrefund.org for more information.
- **Local VITA capacity:** VITA is a powerful resource for clients. However, in most locations, VITA capacity is extremely limited after April 18 and will quickly become overwhelmed if large outreach campaigns directly or indirectly point beneficiaries to VITA. Agencies should be cautious about a landing page that is too reliant on VITA, unless they are confident the VITA site has very high capacity. We encourage you to talk with your local VITA site about simplified filing so that they can make it available to clients who are unable or unwilling to file a full return. VITA sites can count returns prepared via GetCTC.org toward grant deliverables. Feel free to refer them to outreach@getyourrefund.org for more information.

	Recognition	Services available	User Considerations	Data Tracking Available
ChildTaxCredit.gov	High	GetCTC, GetYourRefund, Additional Tax Prep Services	Clear explanation of the Child Tax Credit and how to claim it. Requires a few clicks to get to GetCTC, but simplified filing is prominent on the site.	State agencies and large cities can request limited unique URLs allowing them to track key data on clients referred to GetCTC or GetYourRefund via ChildTaxCredit.gov. Other partners can view GetCTC outcomes by zip code.
GetCTC.org <i>*Launches mid-May*</i>	Med	GetCTC; offramp to GetYourRefund for clients who may benefit from filing a full return	Fastest way for most clients to get to simplified filing, the best option for most clients in the offseason. Fewer clicks means less dropoff.	Any partner can request an unlimited number of unique URLs for comparing multiple outreach methods. Request URLs here.
GetCTC.org/stimulus <i>*Launches May/June*</i>	Med	GetCTC; offramp to GetYourRefund for clients who may benefit from filing a full return	A copy of the GetCTC landing page, which highlights clients' ability to claim EIP3 using GetCTC. Just as fast to get to simplified filing. May be a good option for recipients without children.	Any partner can request an unlimited number of unique URLs for comparing multiple outreach methods. Request URLs here. Unique URLs will be of the form: GetCTC.org/stimulus?&s=yourorg
GetYourRefund.org	Med	File Myself, Full Service, VITA Site Locator, GetCTC	Some potential for choice overload or confusion. Limited availability of VITA tax prep services in many areas could create a frustrating experience for clients.	Any partner can request an unlimited number of unique urls for comparing multiple outreach methods.
Agency landing page	High	Your choice	Helpful if you have significant local VITA capacity in the offseason, or want to send clients to a .gov site other than the White House site.	Any partner can request a unique URL to track all traffic you send to GetCTC or GetYourRefund — but of course we won't be able to tell you how clients found the landing page.

Can you help me conduct an outreach experiment?

Yes! We are always eager to learn more about what does and does not work. If you are interested in collaborating with Code for America on an outreach experiment, please send a brief description of the experiment to outreach@getyourrefund.org. We will respond to your request as soon as we are able. With rare exceptions, we can only share aggregate data at the custom URL or zip code level; we cannot share individual-level data.

What data can you share with me about the families I refer to GetCTC.org?

We know that being able to track the results of outreach campaigns can help partners make the case for this important work.

- We encourage all of our human service agency outreach partners to [request a unique url](#) (e.g., GetCTC.org/youragency), which will allow us to report basic outcome metrics (home page visits, returns started, returns accepted over time, estimated dollars delivered, etc.) for families accessing GetCTC.org via that URL. Metrics are viewable on an online partner dashboard. You can also view outcome metrics by zip code or collection of zip codes.
- If you utilized a unique URL on GetCTC.org in 2021, you can use that same one this year.
- If you are interested in collaborating with Code for America on an outreach experiment, please send a brief description of the experiment to outreach@getyourrefund.org. We will respond to your request as soon as we are able. With rare exceptions, we can only share aggregate data at the custom URL or zip code level; we cannot share individual-level data.

I'd like to send text messages to my beneficiaries, but we don't have the technology for this. How are other states doing it?

Code for America's outreach team can provide you with resources on how to launch a texting platform, and provide you with limited coaching (or connect you with an organization that can provide more support). Reach out to outreach@getyourrefund.org for more info.

How can I get funding for these messages? Can I use American Rescue Plan (ARP) state and local funds?

Our team is developing guidance around funding that can be used to support this work. [Sign up for updates](#) to receive additional information as it becomes available.

What mediums can I use to reach beneficiaries? Can I email? Can I call?

You should tell your beneficiaries about tax benefits through whatever channels you customarily use to communicate with them. If that includes text message, that's great, since we know that text messages are the most efficient mechanism. But any direct contact is better than nothing:

- Emails can be effective, provided they are focused, short, and direct.

- Some agencies have had success with phone calls.
- While we do not have data on snail mail notices at the state level, they appear to have been effective in federal outreach.
- If your state has an online benefits portal where beneficiaries interact with you, put a large and actionable banner in the portal they can click on.
- Think about other contexts in which you will be directly in touch with beneficiaries — for example, to initiate eligibility redeterminations. Can you add tax benefits outreach to these existing touches?
- No matter what you do, consider putting a banner on your core website as well, to produce clicks, as well as to help beneficiaries confirm that the other communications they've received are legitimate.

The key point is that the messages should, as much as possible, be *direct communications to beneficiaries*. Social media posts, online ads, press releases, and awareness-raising among state staff are far less effective in encouraging families to file, and often have no impact at all.

4. Campaign Details

Who is running this campaign and why?

Code for America is leading the National Outreach Campaign for Tax Benefits. Our goal is for every state benefits agency in the country to send tax benefits outreach to its beneficiaries because we know that this is the most effective tool we have in ensuring that all families access their tax benefits. We are collaborating with the White House, the U.S. Department of the Treasury, American Public Human Services Organization, National Association of Counties, National League of Cities, Center on Budget and Policy Priorities, Share Our Strength, and Economic Security Project to provide support to agencies and organizations interested in conducting tax benefits outreach.

What shows up on the outreach map?

The outreach tracker at our National Campaign for Tax Benefits website celebrates tax benefits outreach conducted by state, city, and county agencies across the country. If you would like your outreach to be included on the map, please fill out [this form](#).

Additional questions and marketing / communications plans?

If you have any additional questions, or substantive plans for broader marketing and communications that highlight GetCTC (or Code for America generally), please reach out to our partnerships team at outreach@getyourrefund.org.

For more information about Code for America, visit: codeforamerica.org

Appendix A: Services Available at GetYourRefund.org in 2022

	GetYourRefund <i>Full Service, Virtual VITA</i> File for multiple years with assistance.	File Myself <i>Facilitated Self Assistance / DIY</i> File quickly online on your own for 2021.	GetCTC <i>Simplified Filing, Express</i> File quickly on your own to collect your stimulus payments and Child Tax Credit.	VITA Site Location Finder <i>In-person VITA</i> Find a site near you for in-person help.
Availability	<ul style="list-style-type: none"> 1/31/22 - 10/1/2022 Very limited capacity 	<ul style="list-style-type: none"> 1/31/22 - 10/15/22 Unlimited capacity 	<ul style="list-style-type: none"> May 11 - mid November Unlimited capacity 	<ul style="list-style-type: none"> Open dates vary Capacity limited Call for info
Household income limit	under \$66,000	Under \$73,000	Under \$12,500 (\$25,000 if filing jointly)	Typically under \$58,000
Filing years	2021-2018	2021	2021	2021-2018
Credits and payments	CTC, Any Stimulus, EITC, State Credits	CTC, Stimulus 3, EITC, State Credits	CTC, Stimulus 3	CTC, Any Stimulus, EITC, State Credits
Required information	Photos of IDs (Social Security and ITIN paperwork) Photos of tax documents (w2s, 1099s, etc.)	Social Security or ITIN numbers Tax documents (w2s, 1099s, etc.)	Social Security or ITIN numbers	Paper copies of IDs (social security and ITIN paperwork) Tax documents (w2s, 1099s, etc.)
Length of time to file <i>IRS payment processing times vary 3-6 weeks</i>	2-8 weeks (includes 2 phone calls with a VITA volunteer)	45 minutes	15 minutes	Depends on location
Other Considerations	<ul style="list-style-type: none"> IRS-certified VITA tax team ITIN application assistance Accessing required documents can be a major barrier for clients. 	<ul style="list-style-type: none"> IRS-certified chat support available Software is formatted for smartphones, but we highly recommend computers or tablets. 	<ul style="list-style-type: none"> Simplified filing does not allow clients to claim benefits like the EITC or state credits; however, all clients will be offered the opportunity to file a full return as part of the GetCTC flow. 	<ul style="list-style-type: none"> IRS-certified VITA tax team ITIN application assistance (sometimes)

Appendix B: Tax Benefits Available in 2022: Summary

Benefit	Amount	Get it via simplified filing?	Get it via traditional full filing?	Notes
Remaining amount of 2021 CTC	\$3,600 per young child, or \$3,000 per older child, minus whatever the taxpayer received in AdvCTC payments July-Dec 2021.	Yes	Yes	If the advance payments went to a different household last year, the advance payments to this taxpayer were \$0. Families need to look up how much they received in advance payments, based on their own records, using IRS online tools , or from IRS Letter 6419.
Remaining amount of EIP3	\$1,400 per household member, <i>minus</i> whatever the taxpayer received in March 2021.	Yes	Yes	Families likely need to look up how much they received in automatic payments, based on their own records, using IRS online tools, or from IRS Letters 1444-C or 6475.
EITC	Up to \$3,618 with 1 child, \$5,980 with 2 children, \$6,728 with 3+ children. Up to \$1,500 with no children	Unlikely (federal only)	Yes	The American Rescue Plan Act (ARPA) tripled the childless maximum credit amount and significantly expanded eligibility. In 28 states , there is also a supplemental state EITC, which will not be available through simplified filing.
Child and Dependent Care Credit	Half the cost spent on child care that allowed taxpayers to work or look for work, up to \$4,000 for one child or \$8,000 for two or more children.	No	Yes	ARPA made this credit fully refundable, so even families with very low incomes can receive it. Filers must provide the Employer Identification Number or Social Security Number of their child care provider.
Withheld taxes	Depends on earnings and withholding	No	Yes	Any tax withheld from paychecks in excess of tax owed
State tax benefits	Depends on state	No	Yes	State EITCs or other credits