

WAYS TO HELP TAY GET THEIR REFUND



John Burton Advocates for Youth

Ways to help TAY get their refund presented by Emmerald Evans and Anna Johnson

FEDERAL EARNED INCOME TAX CREDIT WHAT'S NEW?

- For the 2021 tax year, eligibility threshold lowered to
 - 18 years old for foster and homeless youth
 - 19 years old for all transition age youth
- Amount of the credit is up to
 - \$1,502 for individuals
 - \$6,728 for parents




The EITC is for working people who earn less than \$57,414. This year, the amount of the credit you could receive is up to \$6,728 if you claim qualifying children or up to \$1,502 if you don't claim qualifying children. The amount of the credit depends on:

- whether you are single or married
- if you have no children or the number of qualifying children you have
- the amount you earned

Just imagine what you could do with the EITC.



Life's a little easier with


eitc
 earned income tax credit



See if you qualify.
www.irs.gov/eitc

Publication 962 (Rev. 12-2021) Catalog Number 13772B Department of the Treasury Internal Revenue Service www.irs.gov

Are you eligible to claim the EITC for 2021?
Here are the rules to claim the credit . . .

- Generally must be a U.S. citizen or resident alien all year
- Must work and have earned income
- Must have a valid Social Security number issued on or before the due date of the return (including extensions)
- May not have more than \$10,000 of investment income (such as interest)
- Married but separated taxpayers who don't file a joint return may qualify to claim the EITC if they have a qualifying child and if they meet certain other requirements.
- May not be a qualifying child of another person
- May not file Form 2555 (related to foreign earned income)

You have to file a federal income tax return to get the EITC even if you owe no tax or are not required to file. The EITC provides a boost to help pay your bills or save for a rainy day.

Did you meet the rules?

If so, your earned income must be less than . . .

- \$21,430 (\$27,380 if married filing a joint return) with no qualifying children who have valid SSNs
- \$42,158 (\$48,108 if married filing a joint return) with one qualifying child who has a valid SSN
- \$47,815 (\$53,865 if married filing a joint return) with two qualifying children who have valid SSNs
- \$51,464 (\$57,414 if married filing a joint return) with three or more qualifying children who have valid SSNs

Special rules may apply for members of the U.S. Armed Forces in combat zones, members of the clergy, and those with disability retirement income.

Do you have a qualifying child who lives with you?
To be a qualifying child for the credit . . .

- The child must meet the relationship, age, residency, and joint return tests described at www.irs.gov/eitc or in Publication 596, Earned Income Credit.

Did you double check your facts?
Here are common errors to avoid . . .

- Claiming a child as a qualifying child who does not meet the relationship, age or residency tests
- Underreporting or overreporting income or expenses
- Social Security number and last name mismatches

If you claim the EITC, the IRS can't release your refund until mid-February. Errors on the tax return can cause a delay in processing your claim for the tax credits.

Do you want help with the EITC?
Go online or call us toll free . . .

- Go to www.irs.gov/eitc for free information and to check out the interactive EITC Assistant to see if you qualify for the credit and estimate the amount of your EITC.
- Visit a Volunteer Income Tax Assistance (VITA) site for free tax help and preparation. Go to www.irs.gov/vita or call 1-800-906-9887 to find a site.
- Use Free File at www.irs.gov/FreeFile for free online filing through commercially available tax preparation software.
- Go to www.irs.gov/chooseataxpro to help locate a qualified tax return preparer.
- Call 1-800-829-4059 if you have access to TTY/TDD equipment for the hearing impaired.

ADVANCED CHILD TAX CREDIT

WHAT'S NEW?

- **For the 2021 tax year,**
 - The amount of the Child Tax Credit was increased
 - Parents may have received advanced monthly checks, worth part of the value of the full credit
 - To claim the full amount, they must file their taxes
 - **Reminder** – parenting TAY are eligible whether or not they have earned income in 2021
- **Amount (up to)**
 - **\$3,600** per child ages 5 and under in 2021
 - **\$3,000** per child ages 6-17 in 2021



Federal Stimulus Amounts in 2020 and 2021

Did you receive all three?

	FEDERAL STIMULUS			
HOW MANY CHILDREN DO YOU HAVE?	DID YOU EARN LESS THAN \$75,000?	DID YOU RECEIVE THE FIRST PAYMENT IN 2020?	DID YOU RECEIVE THE SECOND PAYMENT IN 2020?	DID YOU RECEIVE THE THIRD PAYMENT IN 2021?
None	\$75,000	\$1,200	\$600	\$1,400
1	\$75,000	\$1,700	\$1,100	\$2,800
2	\$75,000	\$2,200	\$1,700	\$4,200
3	\$75,000	\$2,700	\$2,300	\$5,600

2022 TAX FILING RESOURCES

jbay.org/resources/tax-filing/



TAX CREDITS PUT MONEY IN YOUR POCKET

A TAX FILING GUIDE FOR TRANSITION AGE YOUTH



FEBRUARY 2022

TAX PREP CHECKLIST FOR TRANSITION AGE YOUTH



STEP 1: HAVE YOUR PERSONAL INFORMATION READY



DO YOU HAVE A GOVERNMENT ID, DRIVER'S LICENSE, OR PASSPORT?

IF YES

Your name, address, and ID number will be used to file your taxes.

IF NO

You can get help obtaining your ID. Current and former foster youth should contact their case manager, dependency attorney, ILP coordinator or the Ombudsperson's office for help at 1-877-846-1602 or fosteryouthhelp@des.ca.gov.



DO YOU HAVE A PERMANENT ADDRESS?

IF YES

Great, this will be used if you choose to have your cash back refund mailed to you as a check.

IF NO

That's ok - you can still file your taxes and get your refund! With their permission, you can use a health care clinic, shelter, or drop-in center's address as your permanent address.

DO YOU HAVE A SOCIAL SECURITY NUMBER OR INDIVIDUAL TAXPAYER IDENTIFICATION NUMBER?

If you are married, have children or are caring for an elderly parent in your home you'll need their social security number too.

IF YES: You will need this number to file your taxes.



IF NO: YOU NEED TO GET A SOCIAL SECURITY CARD / NUMBER

You can get help obtaining your social security card from your case manager, dependency attorney, or the Ombudsperson's office. If you have a Social Security Number, but you do not know what it is or have forgotten it, go to your local Social Security office. Bring as many legal identity documents as you currently have with you, such as your passport, birth certificate, driver's license, marriage license, or official name change order. You may be able to order a replacement card online.



IF NO: YOU NEED AN INDIVIDUAL TAXPAYER IDENTIFICATION NUMBER (ITIN)

If you do not have a Social Security Number and are not eligible for one, you may use an ITIN to file your taxes. In order to receive an ITIN number apply online, use an IRS acceptance agent, or work with VITA site that offers that help. You can see if this is right for you by [completing this quiz](#).



HOW TAX FILING BENEFITS FOSTER YOUTH

NINE THINGS EVERY FOSTER YOUTH AND THEIR ADULT SUPPORTERS SHOULD KNOW



DECREASES POVERTY

Assisting foster youth with completing their taxes provides them much-needed financial support, increasing annual income by 42% for foster youth tax filers with a dependent and 14% for single filers. This income can help youth maintain their housing, school enrollment, food security and more.



ENSURES ACCESS TO TAX BENEFIT PROGRAMS

Assisting foster youth with filing their taxes ensures that they receive the full range of ongoing state and federal income support programs, as well as one-time benefit programs, such as those provided during the pandemic. A 2021 report found that 60% of foster youth had not received these relief payments because they had not filed their taxes.¹



SUPPORTS PARENTING FOSTER YOUTH AND THEIR CHILDREN

Children of foster youth are at a heightened risk of maltreatment.¹ Assisting foster youth with filing their taxes reduces this risk by moving parenting foster youth out of deep poverty and providing critically needed financial support to their children.¹

FOR MORE INFORMATION AND RESOURCES SEE OUR TAX FILING GUIDE: JBAY.ORG/RESOURCES/INFORMATION-ABOUT-CALIFTC/



2022 Tax Season for Tax Year 2021
**TAX CAMPAIGN FOR TRANSITION
AGE FOSTER YOUTH**
PROMOTIONAL TOOLKIT

1 REVIEW AND SHARE JBAY'S TAX GUIDE WITH TAY

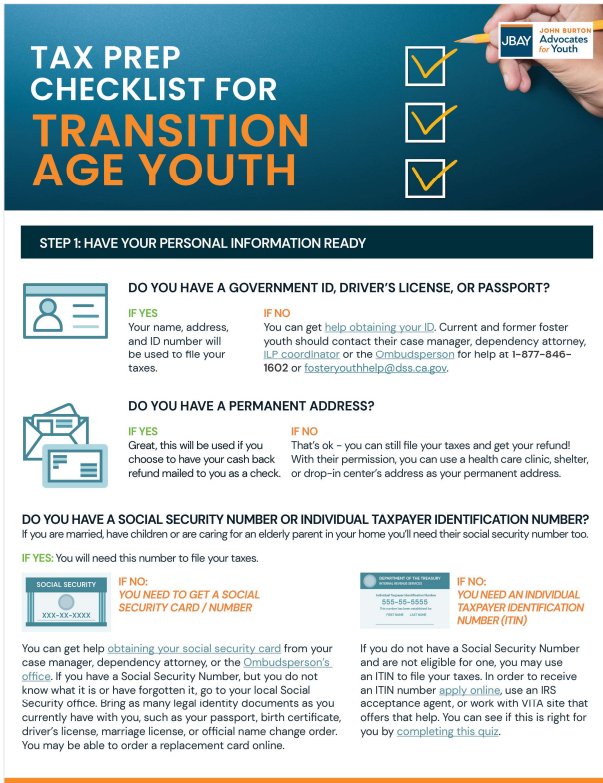


JBAY's EITC Guide:

www.jbay.org/resources/tax-filing-guide/

- Written for TAY and supporters as an audience
- Contents:
 - Key terms to know
 - Cash back credits explained
 - How much cash back could you receive in your tax refund?
 - Who can file? Who has to file?
 - Tax preparation
 - Special circumstances to consider
 - Tax outreach
 - Legal changes to tax credits that benefit transition-age youth
 - Key resources

2 HELP TAY PREPARE TO FILE WITH A CHECKLIST



TAX PREP CHECKLIST FOR TRANSITION AGE YOUTH

STEP 1: HAVE YOUR PERSONAL INFORMATION READY

DO YOU HAVE A GOVERNMENT ID, DRIVER'S LICENSE, OR PASSPORT?

IF YES: Your name, address, and ID number will be used to file your taxes.

IF NO: You can get [help obtaining your ID](#). Current and former foster youth should contact their case manager, dependency attorney, ILP coordinator or the Ombudsperson for help at 1-877-846-1602 or fosteryouthhelp@dss.ca.gov.

DO YOU HAVE A PERMANENT ADDRESS?

IF YES: Great, this will be used if you choose to have your cash back refund mailed to you as a check.

IF NO: That's ok – you can still file your taxes and get your refund! With their permission, you can use a health care clinic, shelter, or drop-in center's address as your permanent address.

DO YOU HAVE A SOCIAL SECURITY NUMBER OR INDIVIDUAL TAXPAYER IDENTIFICATION NUMBER?

If you are married, have children or are caring for an elderly parent in your home you'll need their social security number too.

IF YES: You will need this number to file your taxes.

SOCIAL SECURITY **IF NO: YOU NEED TO GET A SOCIAL SECURITY CARD / NUMBER**

You can get help [obtaining your social security card](#) from your case manager, dependency attorney, or the Ombudsperson's office. If you have a Social Security Number, but you do not know what it is or have forgotten it, go to your local Social Security office. Bring as many legal identity documents as you currently have with you, such as your passport, birth certificate, driver's license, marriage license, or official name change order. You may be able to order a replacement card online.

INDIVIDUAL TAXPAYER IDENTIFICATION NUMBER (ITIN) **IF NO: YOU NEED AN INDIVIDUAL TAXPAYER IDENTIFICATION NUMBER (ITIN)**

If you do not have a Social Security Number and are not eligible for one, you may use an ITIN to file your taxes. In order to receive an ITIN number [apply online](#), use an IRS acceptance agent, or work with VITA site that offers that help. You can see if this is right for you by [completing this quiz](#).

Tax Preparation Checklist

jbay.org/resources/tax-prep-checklist-for-transition-age-youth-2/

Commit to supporting TAY with filing taxes

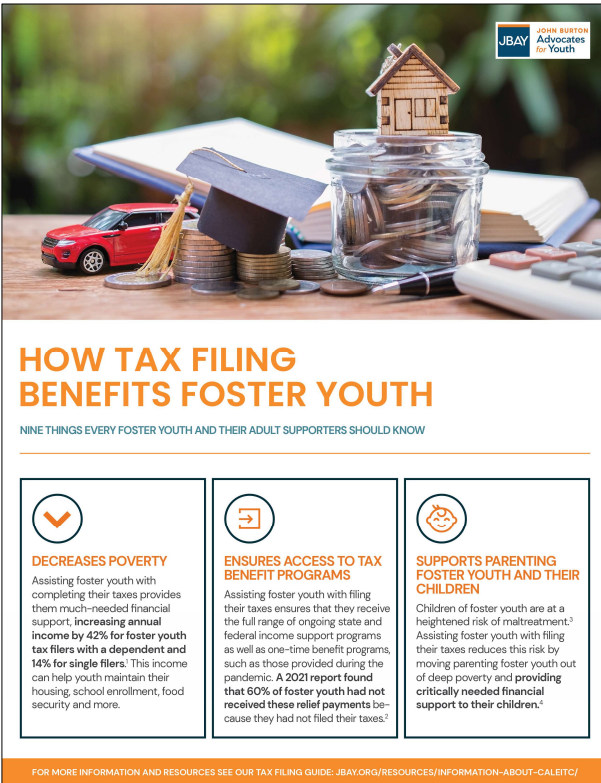
- Encourage them to file
- Help them receive free reliable information, support, and materials from JBAY and other partners throughout the tax season

3 SHARE INFORMATIONAL MATERIALS ABOUT EITC AND TAXES WITH TAY AND PARTNERS ON SOCIAL MEDIA



- Follow JBAY on [Twitter](#), [Instagram](#) and [Facebook](#)
- Visit JBAY's [website](#) on tax filing and download the social media toolkits, posters, and brochures you can use for outreach

4 TALK TO TAY ABOUT HOW FILING BENEFITS THEM



HOW TAX FILING BENEFITS FOSTER YOUTH
NINE THINGS EVERY FOSTER YOUTH AND THEIR ADULT SUPPORTERS SHOULD KNOW

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FOR MORE INFORMATION AND RESOURCES SEE OUR TAX FILING GUIDE: [JBAY.ORG/RESOURCES/INFORMATION-ABOUT-CALEITO/](https://jbay.org/resources/information-about-caleito/)

How Tax Filing Benefits Foster Youth


jbay.org/resources/tax-filing-foster-youth/

- Decreases poverty
- Ensures access to tax benefit programs and cash back
- Supports parenting youth and their children
- Increases access to financial aid
- Uncovers identity theft
- Eliminates use of paid tax preparers
- Maintains eligibility for public benefits
- Establishes official income for benefits determination
- Educates and helps instill a practice of tax filing

5 DIRECT TAY TO FREE TAX PREP SERVICES

VITA LOCATOR TOOL

irs.treasury.gov/freetaxprep/



[Program Info](#)

Get Free Tax Prep Help

The IRS Volunteer Income Tax Assistance (VITA) and the Tax Counseling for the Elderly (TCE) programs offer free tax help for taxpayers who qualify. Find a provider near:

within miles

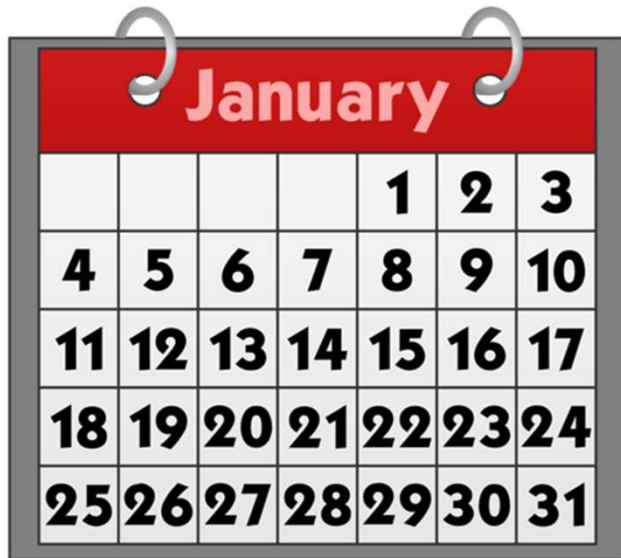
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Provider	Distance	Dates	Hours	Languages	Appointment
United Way Bay Area 550 Kearny Street Ste 1000 Mobile Site - Call 211 for information San Francisco, CA 94108 Volunteer Prepared Taxes Get Directions and Service Details	0.1 MI	01 FEB 2022 - 15 APR 2022		English Cantonese Mandarin Spanish	Required
NECFU - Chinatown 778 Clay St 3rd Floor San Francisco, CA 94108 415-434-0738 Volunteer Prepared Taxes Get Directions and Service Details	0.3 MI	01 FEB 2022 - 31 MAR 2022	MON 11:00AM - 3:00PM TUE 11:00AM - 3:00PM WED 11:00AM - 3:00PM THU 11:00AM - 3:00PM FRI 11:00AM - 3:00PM	Chinese English Cantonese Mandarin	Not Required

6 HELP TAY FILE FOR PREVIOUS YEARS AND SAVE IMPORTANT TAX DOCUMENTS



TAY can **file previous year's taxes** up to three prior tax years.

They will need to gather their **tax information from those prior years** and can use the same checklist to prepare.

How to **organize** tax documents:

www.taxslayer.com/blog/how-to-organize-your-tax-documents-for-the-new-year/