



WS 15-02
January 26, 2015
Basic/Expanded Service
Expires: Continuing

To: Career Offices

From: Mike Temple
David Baggerly
Lucretia Hammond

Subject: Federal Tax Credits and No-Cost Tax Filing Assistance

Purpose

To promote and provide updated information on federal tax credits and no-cost tax filing assistance for TANF recipients and other low-income workers.

Background

The Earned Income Credit (EIC) is a federal income tax credit for low-income working individuals and families.

The Child Tax Credit (CTC) is a federal income tax credit for low-income working families with one or more children.

- The EIC and CTC often result in a refund to low-income households who file a return.
- To qualify for these credits, taxpayers *must* file a tax return, even if they did not earn enough money to be obligated to file a tax return. A qualifying taxpayer must file a return and claim applicable credits in order to receive them.
- EIC and CTC refund payments do not count as income when applying for or renewing benefits like Supplemental Nutrition Assistance (food stamps), Supplemental Security Income (SSI), Medicaid, Temporary Assistance for Needy Families (TANF) cash assistance, or public housing.

The Volunteer Income Tax Assistance (VITA) program offers free tax help for low-to-moderate income households (generally, those that made \$53,000 or less), persons with disabilities, the elderly and limited English speaking taxpayers who need assistance in filing a federal tax return. VITA sites are generally located at community and neighborhood centers, libraries, schools and shopping malls. Most locations also offer free electronic filing. A list of VITA sites is available on the IRS Website at [List of VITA Sites](#) or by calling 1-800-906-9887.

Promoting the Credits

Career office contractors and managers will make sure the staff promotes the tax credits to customers who are tagged in TANF/Choices and who are working or have worked during the past year.

The Center on Budget and Policy Priorities has created an outreach campaign kit entitled Your Money. You Earned It. Now Claim It! The campaign kit includes an information book, fact sheets for EIC & CTC and information for free tax filing assistance through VITA. You may download the campaign kit and other outreach materials at no cost from the center's website <http://eitcoutreach.org/home/outreach-tools/>.

Action

1. Make sure all offices display the EIC posters in resource rooms.
2. Make sure all offices have copies of the EIC informational flyers, the EIC/CTC Benefits Chart and the VITA checklist available in resource rooms for interested customers to pick up.
3. Make sure all office managers, supervisors, personal service representatives, employment counselors and other appropriate staff are aware of the EIC and where customers can go for free tax help.
4. Make sure staff promotes the use of the tax credits, and tax filing, to individuals tagged in TANF/Choices who are working or have worked during the past year.

Questions

Staff should ask questions of their supervisors first. Direct questions for Board staff through the [Submit a Question](#) link.

Attachments

EIC posters

- [English](#) (PDF)
- [Spanish](#) (PDF)

EIC flyers

- [English](#) (PDF)
- [Spanish](#) (PDF)

[EIC and CTC Benefits Chart](#) (DOCX)

VITA Checklist

- [English](#) (PDF)
- [Spanish](#) (PDF)