

# Seattle / King County Coalition on Homelessness Tips on Required Documentation to Complete a 2020 Tax Return

## Email Address:

- Email addresses can be created in advance for client use in filing. Email addresses are required by all tax filing programs and can help you track the status of your client's refund. There is a limit to how many emails can be associated with any one phone number (ex. AOL caps at 10 different addresses per phone number, Gmail 4 per phone etc.). Consider setting up these accounts in advance of an outreach or pop-up event. Make sure to document which emails addresses are associated with each client.

## Phone Number:

- Phone numbers are also required for tax filing, although you do not need to provide a unique phone number for each refund if you are helping a group file. We encourage you to identify in advance which phone and phone number(s) you and your team will be using for this. Please use a cell phone and not a landline: You will be prompted to input two factor authentication to confirm phone number and email address when filing.

## Earning Statements:

- If the person you are working with has earned any money this past year, they will need to gather their W2, 1099 etc. forms to report earned income. If your client does not have access to these documents, the first step would be to contact the employer and see if they can provide the information. If this isn't an option, you will want to contact the local IRS office. Below are additional instructions from the IRS:
  - **Contact your employer.** You should first ask your employer to give you a copy of your W-2. You'll also need this form from any former employer you worked for during the year. If employers send the form to you, be sure they have your correct address.
  - **Contact the IRS.** If you exhaust your options with your employer and you have not received your W-2, call the Seattle IRS office at 206-946-3400. You'll want to have the following when you call:
    - Your name, address, Social Security number and phone number; Your employer's name, address and phone number; The dates you worked for the employer; and an estimate of the amount of wages you were paid and federal income tax withheld in 2019. If possible, you can use your final pay stub to figure these amounts.

## Bank Account Information:

- We encourage you to help your clients set up a bank account for direct deposit to help them claim their refund quickly and set up their funds on a debit card. This is not only the quickest way for your clients to claim their funds, but it also sets them up for greater financial success down the road. Some financial institutions in King County have services tailored to people with barriers to traditional banking, including people experiencing homelessness:
  - Compass Housing Alliance has banking services available to those who use their client services office through Commerce Bank. For more information call 206-474-1000 or visit 77 S Washington St.
  - Seattle Credit Union offers accessible banking services for those with barriers to traditional banking. Learn more using [this form](#), or by calling 206-398-5500.
  - Express Credit Union is working with United Way of King County to create direct deposit accounts to direct refund money to. [Click here](#) or call 206-622-1850 for more information. Express Credit Union can also help generate an ITIN number for those needing one to complete a return. [Click here](#) for more information
  - You can review other financial institutions through [Bank On Seattle / King County](#), a service of the Financial Empowerment Network. For additional financial empowerment resources [click here](#).

## Other Common Referrals:

- While this training is focused on tax returns, the reality of homeless outreach is that people will come to you with a wide range of questions and issues. Do not feel like you need to have answers to all questions, state that you are here specifically to help with tax filing and ask if they have a case manager who can follow up with other questions. Here are some common numbers you may be asked for in conducting this outreach:
  - DSHS Intake Line: 1-855-587-0252
  - Local Seattle IRS Number: 206-946-3400
  - Local Seattle Social Security Number: 1-866-494-3135
  - Local Seattle Department of Licensing Number: 360-902-3900

