




# Tax Filing 101 Workshop


## May Session

- ▶ Welcome! We will begin in a few minutes.
- ▶ While we wait, introduce yourself in the chat and let us know what questions you have for later in the meeting.
- ▶ To help us best manage the meeting:
  - ▶ Please **rename yourself** to include first name, pronouns and the organization you are representing
  - ▶ Please **mute** your microphone when you are not speaking
  - ▶ Please **share your camera** if you're comfortable doing so
  - ▶ If you are having technical difficulties, please send a private chat message to Jason or send them an email.



# Stimulus Checks for the Unhoused – Tips for Required Documents

- Email Address – Create in Advance
- Phone Number – Two Factor Authentication
- Social Security or ITIN Number – Cars Ideal, Not Required
- Earning Statements: To Acquire, Follow These IRS Instructions:
  - **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.



# Stimulus Checks for the Unhoused – Tips for Required Documents Continued

- ▶ Other Community Referrals
  - 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
  
- ▶ Mailing Address or Bank Account Info



# Stimulus Checks and Community Mail Programs

- ▶ Millions of Americans have struggled to claim their Economic Impact Payments, particularly people experiencing homelessness. See [this article](#) for details.
- ▶ Community Mail programs (and they clients they serve) have reported issues with receiving stimulus checks from the IRS. We believe these addresses have been flagged due to fraud concerns.
  - ▶ No problems reported with first round of mailing, subsequent payments never delivered
- ▶ Federal Action Being Taken: Department of Treasury, Internal Revenue Service and Post Office Aware and Working on a Solution.



# UPDATE: Stimulus Checks and Community Mail Programs

- ▶ After reporting these issues to our allies in Congress, the IRS has admitted they have flagged some homeless service sites and have agreed to remove address flags from community mail locations.
- ▶ In addition, those who had their second and third stimulus paper stimulus checks returned to sender will have their checks re-issued through the mail! Expect these payments to arrive in 3-4 weeks.
- ▶ Thank you to the staff at Representative Pramila Jayapal's office for pursuing this on our behalf.





# UPDATE: Stimulus Checks and Community Mail Programs

- Address flags have been removed from the following locations:
  - Reach- 2133 3rd Avenue, #116, Seattle, WA 98121
  - Compass Housing Alliance- 77 S Washington St, Seattle, WA 98104
  - Ballard Food Bank- 5130 Leary Ave NW, Seattle, WA 98107
  - St. Vincent de Paul Georgetown Food Bank. 5972 4<sup>th</sup> Ave S, Seattle 98108
  - New Bethlehem Family Day Center. 11920 NE 80<sup>th</sup> St, Suite 100, Kirkland WA 98033
  - Kent Family Engagement Center. 1225 W Smith St, Kent WA 98030
  - Federal Way Day Center. 33505 13<sup>th</sup> Pl S, Suite D. Federal Way, WA 98003
- We believe there are other social service addresses that may have been flagged as well. If you believe your program has been impacted, please email [Jason@homelessinfo.org](mailto:Jason@homelessinfo.org) so we can pass the information along to Representative Jayapal's staff.



# Stimulus Checks and Community Mail Programs – How to Troubleshoot

- ▶ Ask if they Used Non-Filers Portal for First Payment and ask what address they had the checks sent to.
- ▶ If client reports issues receiving payment after checking address flag, we still encourage you to proactively complete a 3911 Form, trace request and hold on file if necessary.

# 3911 Trace Request

- Write "EIP", followed by the number "1,2, or 3" on the top of the form based on which stimulus payment is in question. EIP stands for Economic Impact Payment, so if you are requesting a trace on the second payment write "EIP2"
- Complete the form answering all refund questions as they relate to your payment.
- When completing item 7 under Section 1:
  - Check the box for "Individual" as the **Type of return**.
  - Enter "2021" as the **Tax Period**.
  - Do not write anything for the **Date Filed**.
  - Sign the form. If you're married and filing together, both spouses must sign the form
- ▶ Please note that this process can take up to four to six weeks to complete.
- ▶ For additional assistance in these situations, you can contact the University of Washington Federal Tax Clinic at 206-685-6805.

Form <b>3911</b> (January 2018)	Department of the Treasury - Internal Revenue Service <b>Taxpayer Statement Regarding Refund</b>	OMB Number 1545-1384
<p>The box checked below is in reply to your inquiry on _____ about your Federal tax return for _____</p> <p>We sent you the following refund(s) \$ _____, \$ _____, \$ _____ on _____.</p> <p><input type="checkbox"/> Check <input type="checkbox"/> Direct Deposit</p> <p><input type="checkbox"/> The U.S. Postal Service returned your check because they could not deliver it.</p> <p><input type="checkbox"/> Your check was not cashed within one year of the issue date as the law requires and it can no longer be cashed.</p> <p>▶ If we indicated above that your check was returned by the Post Office or not cashed within one year of the issue date, please complete Sections I and III of this form and send it back to us in the enclosed envelope or facsimile form to _____.</p> <p>We will send you a new check within six weeks of the date we receive this form.</p> <p><input type="checkbox"/> If you did not receive the refund check, or if you received it and it was lost, stolen or destroyed, please complete Sections I, II and III. Send this form back to us in the enclosed envelope or facsimile form to _____.</p> <p>▶ If you don't hear from us by six weeks from the date you send the form back to us, please contact us at _____.</p> <p>If you prefer, you may write to us at the service center where you filed your return.</p>		
<p><b>Section I</b> Print your current name(s), taxpayer identification number (for individuals, this is your social security number, for businesses, it is your employer identification number) and address, including ZIP code. If you filed a joint return, show the names of both spouses on lines 1 and 2 below.</p>		
1. Your name _____		Taxpayer Identification Number _____
2. Spouse's name (if a name is entered here, spouse must sign on line 14) _____		Taxpayer Identification Number _____
3. Street _____ Apt. No. _____ City _____ State _____ ZIP code _____		
▶ Please give us a phone number where you can be reached between 8 a.m. and 4 p.m. Include area code. _____		Area code _____ Telephone number _____
▶ If any of the above has changed since you filed your tax return, please enter the information below exactly as shown on your return.		
4. Name(s) _____		Taxpayer Identification Number(s) _____
Street _____ Apt. No. _____ City _____ State _____ ZIP code _____		
▶ If you have filed a power of attorney authorizing a representative to receive your refund check, please enter his or her name and mailing address below.		
5. Name of representative _____		6. Address (include ZIP code) _____
7. Type of return <input type="checkbox"/> Individual <input type="checkbox"/> Business, Form _____ <input type="checkbox"/> Other _____		Tax period _____
Type of refund requested <input type="checkbox"/> Check <input type="checkbox"/> Direct Deposit Amount \$ _____		Date filed _____
<p><b>Section II</b> <b>Refund Information</b> (Please check all boxes that apply to you.)</p>		
8. <input type="checkbox"/> I didn't receive a refund. <input type="checkbox"/> I received a refund check, but it was lost, stolen or destroyed.		
9. <input type="checkbox"/> I received the refund check and signed it.		
<p><b>NOTE:</b> The law doesn't allow us to issue a replacement check if you endorsed it and someone other than you cashed the check, since that person didn't forge your signature.</p>		
10. <input type="checkbox"/> I have received correspondence about the tax return. (Please attach a copy if possible.)		
(Please give us the following information if possible.)		
11. <input type="checkbox"/> Name of bank and account number where you normally cash or deposit your checks		
Bank _____		Account number _____
12. a. If the refund was a direct deposit, did you receive a "Refund Anticipation Loan"? <input type="checkbox"/> Yes <input type="checkbox"/> No		
b. Enter the Routing Transit Number(s) _____, _____, _____, and account number(s) _____, _____, _____, shown on your return for the refund you did not receive.		





# Stimulus Checks and Community Mail Programs: Other Options

- Direct Deposit or Pre-Loaded Debt Cards
- Other Mailing Address
- General Delivery: If pursuing, ask the following:
  - Do you accept and distribute general delivery mail?
  - Are there any restrictions on general delivery mail?
  - When can I pick up my general delivery mail?
  - Are there additional fees associated with using general delivery?
  - Do you have a limit on the size or quantity of packages?
  - Do you accept general delivery from FedEx, Amazon, UPS etc?