

Claiming the 2021 Expanded Child Tax Credit & Other Tax Credits

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Aline joined the Coalition on Human Needs (CHN) at the end of 2021 and has helped to launch the CTC Outreach project run collaboratively by CHN and the Partnership for America's Children. Prior to joining the CHN staff, Aline worked in East Harlem, NY for over 7 years helping public housing residents first as a health counselor and then as Program Director of East Harlem Aging Services with the Stanley M. Isaacs Neighborhood Center. Aline is committed to work that centers the voices and needs of low income, vulnerable, and marginalized communities, and addresses their most pressing concerns.



Julia Beebe, Child Tax Credit Outreach Coordinator

Julia has helped to launch the CTC Outreach project run collaboratively by the Coalition on Human Needs and the Partnership for America's Children. She has previously worked as Lead Organizer and Community Organizer for the Matahari Women Workers' Center, an affiliate of the National Domestic Workers Alliance, in Boston, MA. Before that Julia served as a community organizer for Valley Interfaith, an affiliate of the Industrial Areas Foundation, in the Rio Grande Valley, Texas.



Coalition on Human Needs

- Alliance of national groups – service providers, faith groups, policy experts, and labor, civil rights, and other advocates
- Mission: advocate at the federal level to meet the needs of people with low incomes and increase knowledge of positive outcomes from current or proposed programs



COALITION ON HUMAN NEEDS

Partnership for America's Children

- Over 50 members - multi-issue child advocacy organizations -in 40 states
- Mission: to support its network of state and community child advocacy organizations in effective advocacy



PARTNERSHIP
FOR AMERICA'S
CHILDREN

State and local child advocates working
together for a better future

What is the expanded Child Tax Credit (CTC)?



2021 Expanded CTC: More Money and More Families Eligible

\$3,600 per child age 0 to 5, \$3,000 per child age 6 through 17 (previously \$2,000)

No minimum income requirement: families with no earned income are eligible for the full credit.

Credit is fully refundable: families are eligible for the full amount even if they don't owe taxes.

Families were eligible to receive half of the CTC in 2021 and half when they file taxes this year (or the full credit if they did not get advance payments in 2021).

**How much
money is at
stake?**

***Example:* A family with 2-year-old, 4-year-old, and 7-year-old children:**

In total for the 2021 CTC, the family will receive \$10,200.

The family may qualify for additional money through stimulus payments and other state or federal tax credits.

Who is eligible for the 2021 CTC and how do you claim it?



Who is eligible for the expanded CTC?

- Adult may have a Social Security number (SSN) or Individual Taxpayer Identification Number (ITIN); children must have SSNs
 - SSNs must be valid for employment
- Dependent must be the adult's child (including adopted), grandchild, or stepchild; younger sibling, step-sibling, half-sibling, or their descendent; or a foster child placed by a government agency
- Dependent must have lived with the adult in the U.S. for more than half the year (some exceptions, like babies born in the second half of 2021)
- Dependent did not provide over half of their own support in 2021

How do you claim the 2021 CTC?

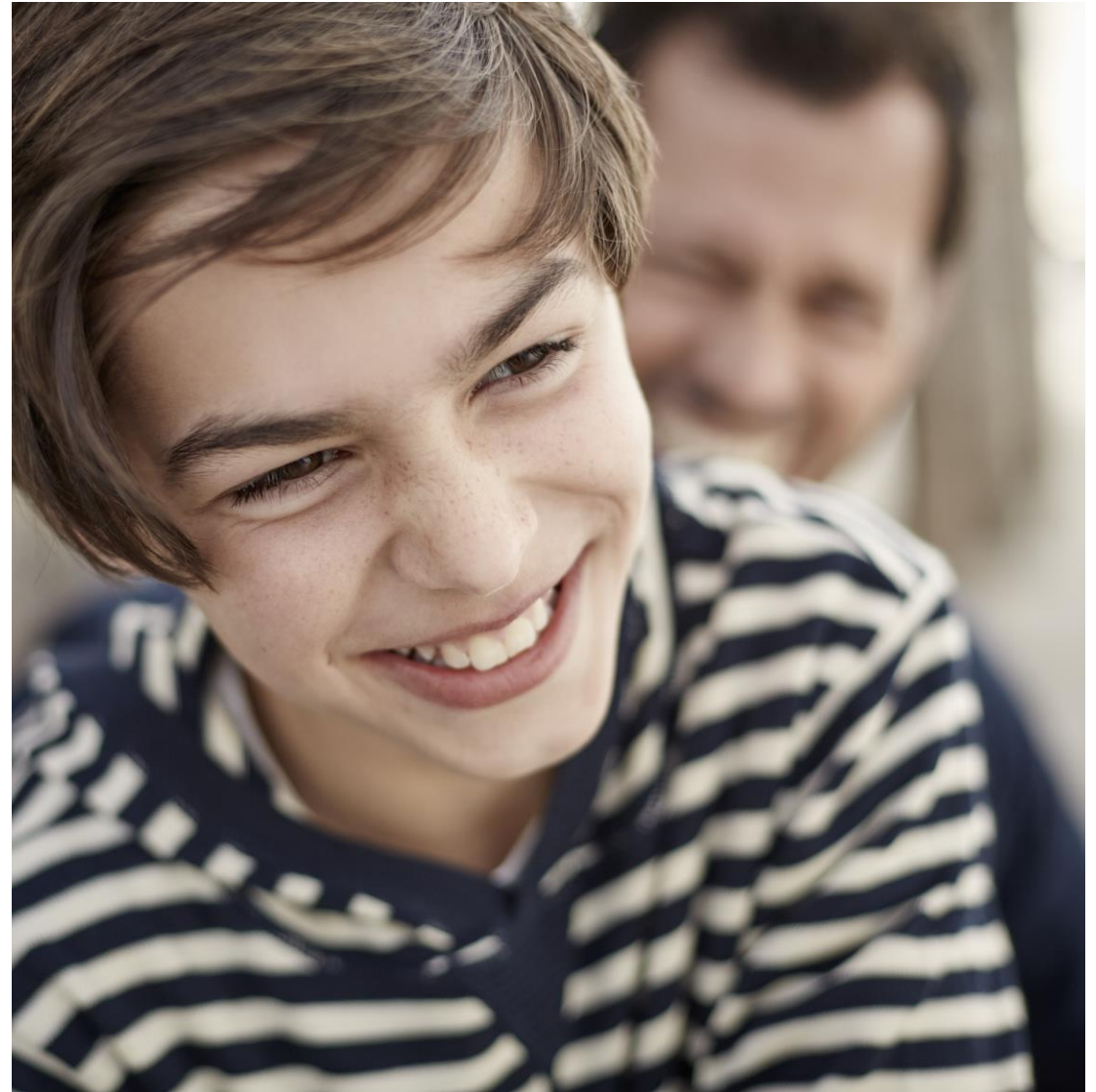
- In 2021, most families automatically received advance CTC payments- \$250 to \$300 per child per month from July through December.
- Families who were not required to file taxes or did not do so in 2019 or 2020 for other reasons, had to take steps to receive the advance payments.
- *Everyone* will need to file tax returns this year to receive the 2nd half or full amount of the 2021 CTC.

Tax Day has passed, but families can still claim the CTC!

Individuals with no or low income can generally still file without penalty.

If they are required to file, but are due a refund from the IRS, they can also still file without penalty.

Individuals have 3 years to claim any tax credits they are owed.



GetCTC.org

- Simplified filing tool helps you claim the CTC & 3rd stimulus payment
- Created by Code for America and is an IRS-approved official E-file provider
- Available in English & Spanish
- Mobile-friendly
- Chat support available
- Most individuals finish in less than 15 minutes.
- GetCTC.org is open through mid-November

Who can claim the CTC using GetCTC.org?

- Have not yet filed a 2021 tax return
- Made under \$12,550 (single), \$18,800 (head of household) or \$25,100 (married filing jointly) in 2021
- Earned less than \$400 in self-employment income
- Have a Social Security number or Individual Taxpayer ID Number (ITIN)
 - Children you claim need Social Security numbers
- Lived in the 50 states or DC; or US military facility
- Did not have advance premium tax credits (credits to lower your monthly health insurance payments)

GetCTC.org

- [Getctc.org/NHSA](https://getctc.org/NHSA)
- [GetCTC demo video](#)
 - 7-minute recording from Code for America





**Who
might file a
full tax return
rather
than file
through
GetCTC.org?**

If individuals make above the filing threshold and/or are eligible for additional money through full tax filing (including the Earned Income Tax Credit), GetCTC may redirect them to its partner website:

[GetYourRefund.org](https://www.getyourrefund.org)

Filing 2021 Tax Returns: Where?

Free Tax Assistance

- You can identify a local VITA site for people you're helping, using https://www.getyourrefund.org/en/vita_providers
 - Many VITA sites are closed this time of year. **Call before showing up to confirm they are open and can assist you.**
 - For married people, both partners must go.
- Through <https://www.getyourrefund.org/en> (English) or <https://www.getyourrefund.org/es> (Spanish), individuals are able to:
 - Access free Do-It-Yourself tax filing services
 - Limited capacity: Get free, virtual tax filing assistance, including the opportunity to discuss your situation with a tax specialist over the phone

Filing 2021 Tax Returns: Where?

Free Tax Assistance

- Different locations may have other available tax assistance, including AARP Foundation Tax-Aide sites which provide free in-person and virtual tax assistance with a focus on individuals who are over 50 or have low-to-moderate income: https://www.aarp.org/money/taxes/aarp_taxaide/locations/?intcmp=FDN-LOCATOR-HOMEPAGE-BTN (ONLY OPEN DURING TAX SEASON)
- Low Income Taxpayer Clinics (LITC) help individuals with low incomes who have tax disputes with the IRS: <https://www.taxpayeradvocate.irs.gov/about-us/low-income-taxpayer-clinics-litc/#finder>

Filing 2021 Tax Returns: Where?

Paid Tax Services

- High Quality, Free tax assistance – virtual and in-person – is available for many families with low incomes, but may not be able to meet everyone's needs.
- If families decide to use paid services, they should be careful that preparers are submitting accurate returns on their behalf.
- Guidance for individuals using paid tax preparers: <https://www.irs.gov/newsroom/tips-to-help-people-choose-a-reputable-tax-preparer>

Required Documents to File Full Tax Returns

GET IT BACK

STIMULUS PAYMENTS

TAX CREDITS

TAX FILING

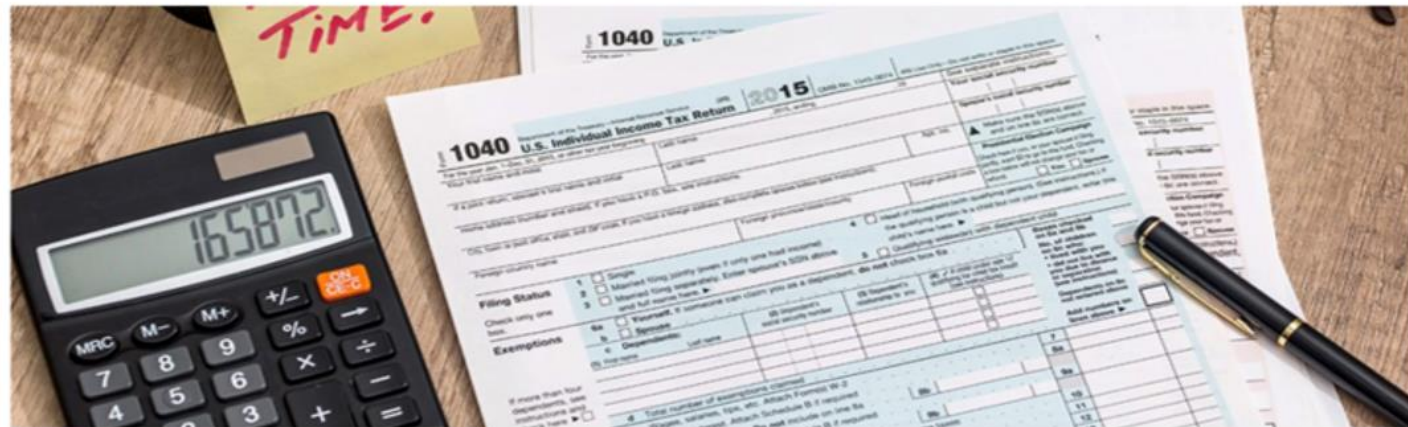
RIDESHARE TAXES

OUTREACH



What to Bring to a Tax Appointment (Tax Checklist)

December 2, 2021



In English:

<https://www.taxoutreach.org/blog/what-to-bring-to-a-tax-appointment-tax-checklist/>

In Spanish:

<https://www.taxoutreach.org/blog/documentos-que-necesita-para-presentar-una-declaracion-de-impuestos/>

Common Barriers and Concerns



Does receiving the CTC impact other public benefits?

Getting this credit will **not** change any federally-funded public benefits that a family receives, like Social Security, SNAP, childcare subsidies, or WIC.

**Will receiving
the CTC affect
someone's
immigration
status
or ability to get
a Green Card?**

No. Under current law, receiving the Child Tax Credit or other tax credits will not affect their immigration status, their ability to get a Green Card, or their future immigration plans. Use of tax credits is not considered in a “public charge” determination by U.S. Citizenship and Immigration Services. (For more, see the [IRS website](#)).

Will the IRS
share
someone's
immigration
status with
other
government
agencies?

No. The IRS is forbidden to share an individual's tax information with other agencies. (There are limited exceptions, related to certain criminal investigations or to determine someone's tax liability). See the [IRS website](#).

**Can
parents/caregivers
claim the CTC using
Individual Taxpayer
Identification
Numbers (ITINs)?**

Yes. Adults with Social Security numbers *or* ITINs can claim the CTC for children who have SSNs.

- If they have a current ITIN, they can still file to claim the CTC and potentially other credits.
- Unfortunately, if they have never had an ITIN and did not apply for a tax filing extension, they can no longer claim the 2021 CTC. They can still apply for ITINs to file taxes and potentially claim credits in future years.
- If they have an *expired* ITIN, they can still claim the 2021 CTC by submitting a form W-7 to renew their ITIN and then filing a tax return. More information on this process is available from the IRS: <https://www.irs.gov/individuals/itin-expiration-faqs>

Will an individual ever have to pay this money back?

- The CTC is ***not*** a loan.
- If someone receives payments for a child who is no longer their dependent, they may have to pay that money back.
- There are some protections for those with incomes below \$40,000 (\$50,000 for heads of households, \$60,000 for married couples) and more limited protections for those with incomes below \$80,000 (individuals or non-custodial parents), \$100,000 (single, head-of-household), or \$120,000 (couples filing jointly).

What if someone has not filed tax returns in recent years?

- People with very low incomes (under \$18,800 for head of household, \$25,100 for married filing jointly) are generally not required to file.
- Even if they were required to file, generally not a penalty if the IRS owes someone a refund (perhaps from the EITC)
- Taxpayers can file for the 3 past years to receive the refunds they are owed.
- Even if someone owes child support or taxes, they can benefit from claiming the CTC. The credit will go toward paying off the outstanding child support or taxes first, and they'll receive any amount left over. If it all goes toward what is owed, that reduces their debt and means they will be able to get tax credits in future years.

IRS Letter 6419 (Advance CTC payments)

- The IRS sent everyone "6419" letters showing how much they got for the CTC.
- If the amount listed on the letter does not match what a family received in advance CTC payments, they should check their IRS Online Account (<https://www.irs.gov/payments/your-online-account>) for a more up-to-date amount and use that when filing tax returns.

Common Barriers and Concerns

Our resource toolkits, especially the FAQ, addresses these common concerns and others:

Partners: <https://bit.ly/ctcoutreach>

Families: <https://bit.ly/37TGfqH>



Resource Toolkits

Our digital toolkit includes the following materials, from the IRS and national partners as well as us:

- Flyers and posters
- Messaging and press materials (press release, pitch templates, radio PSA script)
- FAQ for service providers
- Social Media Toolkit
- Call, Text, Hold Line, and Newsletter Copy Scripts
- Materials to Help Pick a Tax Preparer and Get Ready for Appointment
- Resources for Immigrant Families
- Best Practices and Lessons for Child Tax Credit Outreach
- Report on Lessons Learned About Benefits Agency and School Outreach
- Findings from Focus Groups with “Non-Filers” and Service Providers
- Resources for tracking outcomes

Sign up for our Child Tax
Credit email list!

<https://bit.ly/3AV18uf>



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GetCTC.org/NHSA



Q&A



THANK YOU
FOR JOINING
US!

