



#### Internal Revenue Service CARES Act - Economic Impact Payment and Resources

**Description:** During this presentation, we will cover COVID-19 Tax Relief - Economic Impact Payments, where to find the latest information and guidance on economic impact payments. How you can assist IRS with Reaching People Who Are Eligible for a Payment and Don't Normally File a Tax Return and other resource information.

#### Presenter:

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Senior Stakeholder Liaison in Communication & Liaison



Working Together to Serve Diverse Communities: A Virtual Resource Fair



### The Coronavirus Aid, Relief, and **Economic Security (CARES) Act** was signed by the President on March 27, 2020.





# Economic Impact Payments (EIP) have also been referred to as:

• "Stimulus Payments"

They are advance refunds of the "Recovery Rebates" provided in the legislation.



# Payments are up to the following amounts:

- \$2,400 for two eligible individuals filing joint returns
- \$1,200 for each eligible individual
- \$500 for each qualifying child claimed by an eligible individual



### Not eligible:

- Dependents who can be claimed on someone else's tax return
- Non-resident aliens





### **Social Security Number**

Valid taxpayer identification numbers must be shown for individuals and any dependents on the return.

- Social Security Number (SSN) valid for employment
- Adoption Taxpayer Identification Number (ATIN) for qualifying children



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### Notification

For security reasons, the IRS plans to mail a letter about the economic impact payment to the taxpayer's last known address within 15 days after the payment is paid.

The letter will provide information on how the payment was made and how to report any failure to receive the payment.

If a taxpayer is unsure they're receiving a legitimate letter, the IRS urges taxpayers to visit IRS.gov first to protect against scam artists.



### **Economic Impact Payments**

The IRS is committed to helping you get your Economic Impact Payment as soon as possible. The payments, also referred to by some as stimulus payments, are automatic for most taxpayers. No further action is needed by taxpayers who filed tax returns in 2018 and 2019 and most seniors and retirees.



#### Check Your Payment Status

Use "Get My Payment" to:

 Check your payment has been sent
 Confirm your payment type: direct deposit or by mail

#### Provide Direct Deposit Information

In certain situations, *Get My Payment* will give you the option of providing your bank account information to receive your Payment by direct deposit. For example, if your payment was sent by mail and the Post Office was unable to deliver it.

Use "Get My Payment" to enter your bank account information to get your payment through direct deposit.

Get My Payment



#### Non-Filers: Enter Your Payment Info Here

Use the "Non-Filers: Enter Payment Info Here" application if you are eligible for an Economic Impact Payment and:

- You are not required to file federal income tax returns for 2018 and 2019 for any reason including:
   Your income is less than \$12,200
  - You're married filing jointly and together your income is less than \$24,400
     You have no income
- **Do not** use this tool if you are required to file a 2018 or 2019 tax return; you should file your return electronically.

**Do not** use this tool if you can be claimed as a dependent on someone else's return.

Non-Filers: Enter Payment Info Here

#### Get more information about Economic Impact Payments

Visit our Economic Impact Payments Information Center to answer your questions about eligibility, payment amounts, what to expect, when to expect it and more.

IRS Partners can visit our <u>Economic Impact Payments</u>: <u>Partner and Promotional Materials</u> page for our latest products to share with clients, stakeholders, customers and constituents.

Also, visit the FDIC website of for information on where to find a bank that can open an account online and how to choose the right account for you.



Do NOT use this tool if you will be filing a 2019 return. Using the tool instead of filing your 2019 return will slow down processing of your tax return and receiving any tax refund.

Non-Filers: Enter Payment Info Here is a free IRS tool that allows you to easily and quickly provide us the necessary 2019 information about yourself and any eligible spouse or qualifying children (Children under the age of 17 at the end of 2019). We will use this information to determine your eligibility and payment amount and send you an Economic Impact Payment. After providing this information, you won't need to take any additional action.

#### When should I use the Non-Filers: Enter Payment Info Here tool?

See our scenarios for using the Non-Filers: Enter Payment Info Here tool.

#### Who is eligible for the Economic Impact Payment?

- U.S. citizens, permanent residents and qualifying resident aliens who:
- Have a valid Social Security number,
- · Could not be claimed as a dependent of another taxpayer, and
- Had adjusted gross income under certain limits.

#### Who will receive the Economic Impact Payment automatically without taking additional steps?

Most eligible U.S. taxpayers will automatically receive their Economic Impact Payments including:

- Individuals who filed a federal income tax for 2018 or 2019
- · Those receiving Social Security retirement, disability (SSDI), survivor benefits
- Supplemental Security Income (SSI) recipients
- · Recipients of Veterans Affairs Compensation and Pension (C&P) benefits
- Individuals who receive Railroad Retirement (RRB) benefits

#### Who should use Non-Filers: Enter Payment Info Here to provide additional information to receive the Economic Impact Payment?

Use the Non-Filers: Enter Payment Info Here tool if:

- · You are not required to file a federal income tax return for 2019 for any reason including:
  - Your income is less than \$12,200
  - You're married filing jointly and together your income is less than \$24,400
     You have no income

To determine if you are required to file a 2019 tax return or if you should file to get a refund, use our Interactive Tax Assistant tool – Do I Need to File a Tax Return? – and answer basic questions.

We've provided English and Spanish options for you to enter your information. Clicking either button below will take you from the IRS site to one of our Free File Alliance partners. The sites are safe and secure.





#### Information You will Need to Provide

- Full name, current mailing address and an email address
- Date of birth and valid Social Security number
- Bank account number, type and routing number, If you have one
- Identity Protection Personal Identification Number (IP PIN) you received from the IRS earlier this year, if you have one
- · Driver's license or state-Issued ID, If you have one
- For each qualifying child: name, Social Security number or Adoption Taxpayer identification Number and their relationship to you or your spouse

#### What to Expect

Follow these steps in order to provide your information:

- Create an account by providing your email address and phone number; and establishing a user ID and password.
- You will be directed to a screen where you will input your filing status (Single or Married filing jointly) and personal information.
- Note: Make sure you have a valid Social Security number for you (and your spouse if you were married at the end of 2019)
  unless you are filing "Married Flüng Jointly" with a 2019 member of the military. Make sure you have a valid Social Security
  number or Adoption Taxpayer Identification Number for each dependent you want to claim for the Economic Impact
  Payment.
- Check the "box" If someone can claim you as a dependent or your spouse as a dependent.
- Complete your bank information (otherwise we will send you a check).
- You will be directed to another screen where you will enter personal information to verify yourself. Simply follow the
  instructions. You will need your driver's license (or state-issued ID) information. If you don't have one, leave it blank.

You will receive an e-mail from Customer Service at Free File Fillable Forms that either acknowledges you have successfully submitted your information, or that tells you there is a problem and how to correct it. Free File Fillable forms will use the information to automatically complete a Form 1040 and transmit it to the IRS to compute and send you a payment.

#### SSA and RRB Benefit Recipients with Dependents

The window has closed to use this tool for SSA and RRB recipients who have a child and don't normally file a tax return. SSA and RRB recipients who do not receive \$500 payments can claim these on a 2020 tax return.



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### **Non-Filers: Enter Payment Info**

Resources	freefile
FACE	IT'S FAST. IT'S SAFE. IT'S FREE.
<u>Return to IRS</u>	This is a Free File Filable Forms product.
	If you don't usually file a tax return, submit your information here to get the Economic Impact Payment
	If you receive veterans disability compensation, a pension, or survivor benefits from the Department of Veterans Affairs, or your income level does not require you to file a tax return, then you need to submit information to the IRS to receive an Economic Impa Payment.
	Complete this free online form so that the IRS can identify you and your dependents, and receive valid direct deposit and address information about you. This information allows the IRS to calculate your eligibility and send you the Economic Impact Payment.
	Do NOT continue here if:
	<ul> <li>You receive Social Security retirement, disability (SSDI), survivor benefits, Supplemental Security Income (SSI) or Vetera Affairs benefits. The IRS will automatically send you an Economic Impact Payment.</li> </ul>
	<ul> <li>You have already filed a 2019 federal income tax return.</li> <li>Your 2019 gross income exceeded \$12,200 (\$24,400 for a married couple) or other reasons require you to file a 2019 federal tax return.</li> </ul>
	<ul> <li>You were married at the end of 2019 and are not submitting information here with your spouse.</li> <li>You were not a U.S. citizen, permanent resident or qualifying resident alien in 2019.</li> </ul>
	Get Started



an Account or Sign In	
Create an Account	Or Continue Filing
	5
Create a new account to file a minimal eturn for the Economic Impact Payment.	Sign In
his service is delivered by Intuit. For letails on how we process your personal information, see the privacy Statement.	I forgot my user ID or password
mail address	
confirm email	
lser ID	
hone (recommended)	
tandard call, messaging or data rates may apply.	
assword	
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confirm password	
Remember me	
G Create Account	





Single O Married filing jointly			
	ally the base and the second state of the second state.		
If there is one adult on this registration, select Sing	gie, it there are two, select Married filing jointly.		
Personal Info			
rersonal into			
Your first name and middle initial	Lest name		Your social security number
If joint return, spouse's first name and middle initial	Lest name	Spouse's social security numb	
Home address (number and street). If you have a P.O. box,	see instructions.	Apt. no.	
City, town or post office, state, and ZIP code. If you have a	foreign address, also complete spaces below (see instr	uctions).	
Foreign country name	Foreign province/state/county	Foreign postal code	



#### Dependents

(1) First name	Last name	(2) Social security number	(3) Relationship to you	(4) Dependent's IP PIN (if applicable)	
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lf you have additional de	pendents, check this box ar	d add them here 🕨 🗌	Add		
Banking Informatio	on				
Routing number			Type: 🔿 Checking	Savings	
Account number					
Providing the IRS with direct deposit information can expedite your economic impact payment. If you don't have a bank account, the IRS will issue a check.					
Identity Protection	PIN (if applicable)				
Taxpayer Identity Protection PIN					

Spouse Identity Protection PIN (if filing jointly)

If you or your spouse have experienced identity theft and the IRS sent you Identity Protection PINs, enter those PINs here to successfully file this return.

Continue to Step 2



formation Entry for the Econo	mic Impact Payment	
Personal Verification You must enter either your 2018 Adjusted Gross	lacome (AGI) or your 2018 five-digit	self-selected signature PIN
f you're filing together, you and your spouse mu		Son Sources signatore ( 11
A. Look at last year's federal tax return and enter your A	GI in the space provided below. Look for y	your AGI on line 7 of the Form 1040.
f yourdidn't file a return last year, enter 0.		
. Jeans and a resamment four anter ar		
<ul> <li>If you are filing Married Jointly this year with the sam</li> <li>If you did not file a return last year, enter a zero in th</li> <li>If your spouse did not file a return last year, enter zero</li> <li>If you don't have or can't remember last year's AGI, to</li> </ul>	e "Taxpayer" AGI space. ro in the "Spouse" AGI space.	er" and "Spouse" will have the same AGI.
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#### **Electronic Signature**

To sign your return electronically, add today's date here. If you're filing together, you and your spouse must both add a PIN and date of birth.

Date (mm/dd/yyyy)	mm/dd/yyyy	
Sell phone number	Taxpayer	Spouse (if filing jointly)
fou can choose any 5 numbers for your PIN. Don't use 00000 or 12345)		
Date of birth (mm/dd/yyyy)	mm/dd/yyyy	mm/dd/yyyy
Driver's license or State issued ID number		
river's license or State issued ID state	•	<b>0</b>
Driver's license or State issued ID issue date	mm/dd/yyyy	mm/dd/yyyy
Priver's license or State issued ID expiration date	mm/dd/yyyy	mm/dd/yyyy



#### **Email Verification**

Filing status emails will be sent to: name@email.com. Verification is required to submit your filing, and your email address is currently not verified.

To verify or change your email address, select Update Your Account. Return here to complete filing.

File this return





Complete Captcha to File	
For security purposes, enter the co button to continue to e-file:	de shown below, then click the Submit
m3e	
Ιτ	another code
Switch to audio verification	
Back to Forms	Submit



File Now

### Ready to File

#### When you select 'File Now,' your return will be submitted to the IRS.

#### **Disclosure statement**

Under penalties of perjury, I declare that I have examined this return, including any accompanying statements and schedules and, to the best of my knowledge and belief, it is true, correct, and complete.

I consent to allow my Intermediate Service Provider, transmitter, or Electronic Return Originator (ERO) to send my return to the IRS and to receive the following information from the IRS: a) an acknowledgement or receipt or reason for rejection or transmission; b) an indication of any refund offset; c) the reason for any delay in processing the return or refund; and d) the date of any refund.

I am signing this return by entering my self-selected signature PIN and associated electronic signature data in Step 2.

🛃 I agree

Back to Forms



### **Frequently Asked Questions**

#### FAQs

#### **General Overview**

- What is Non-Filers: Enter Payment Info?
- What are the qualifications to use Non-Filers: Enter Payment Info?
- What form will I be filling out?
- Is Non-Filers: Enter Payment Info safe?
- Is it safe to use this from a public computer?

#### System Requirements

- · Can Non-Filers: Enter Payment Info be used on a mobile device/phone?
- What are the recommended browsers for using Non-Filers: Enter Payment Info?
- What are the minimum computer requirements for using Non-Filers: Enter Payment Info?
- How do I allow pop-ups?

#### Your Non-Filers: Enter Payment Info Account

- How do I use Non-Filers: Enter Payment Info?
- I didn't receive a confirmation email after my account was created. What should I do?
- Why didn't I receive an acknowledgment email after I transmitted my Non-Filers: Enter Payment Info information?
- How do I change my current account information?
- How long will my account be active?



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X	XX			
	🖵 Get My Economic Impact Pay	rment	🔅 Non-Filers: Enter Payment Info Here	
	Get Coronavirus Tax Relief		Q Get Your Refund Status	
	Do Your Taxes for Free		Get Your Tax Record	
	D View Your Account		Make a Payment	



### **Reminder** Millions of Americans who don't usually have to file a tax return can still use the **Non-Filers tool** to receive their **Economic Impact** Payment.



### Economic Impact Payments for Americans

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The free Non-Filers tool is designed for eligible people who aren't normally required to file a a tax return. Usually, this means people with incomes:

Below \$24,400 for married couples Below \$12,200 for singles This includes couples and individuals who are homeless. People can qualify for a payment, even if they do not have earned income or work.

Usually, married couples qualify to receive a \$2,400 payment while others normally qualify to receive \$1,200. Eligible individuals will receive up to an additional \$500 for each qualifying child.

#### How do I use the Non-Filers: Enter Payment Info tool?

For those who are not required to file a tax return, the process is simple and only takes a few minutes.

- > First, visit IRS.gov, and click "Non-Filers: Enter Payment Info Here."
- > Then provide basic information including Social Security number, name, address and gualifying children.
- ) The IRS will use this information to confirm eligibility, calculate and send an Economic Impact Payment. No tax will be due as a result of receiving the payment.
- > Entering bank or financial account information will allow the IRS to quickly deposit the payment directly in a savings or checking account. Otherwise, the payment will be mailed.
- Non-Filers: Enter Payment Info is secure, and the information entered will be safe. The tool is based on Free File Fillable Forms.

Americans without a permanent address qualify for a one-time \$1,200 Economic Impact Payment. No income is required to claim the payment.

Individuals who normally don't file taxes, need to sign up with the IRS to receive their \$1,200 Payment.

Sign up by using the free online tool

at www.IRS.gov/nonfilereip.

Here's what's needed: Name, a mailing address and an email address

- Date of birth and valid SSN
- Bank account, if they have one
- IP PIN if they received one from the **IRS** earlier
- License or state ID, if they have one
- Name, SSN and relationship for each child



### Social Media Images used by "Homeless" Partners





Spread the word so that those who don't normally

www.irs.gov/nonfilereip

**MIRS** 





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### Social Media Images to help "Non-filers"





- <u>Reminder for low-income Americans to use the non-filer tool</u> <u>Pub. 5412-Q (EN)</u>
- <u>Reminder for low-income Americans to use the non-filer tool</u> <u>Pub. 5412-Q (SP)</u>
- Economic Impact Payments for Americans Experiencing Homelessness Pub. 5412-J
- Economic Impact Payments for Americans Experiencing Homelessness Pub. 5412-J (SP)
- Coronavirus-tax-relief-and-economic-impact-payments
- Keep the EIP Notice for your records Pub. 5412-S



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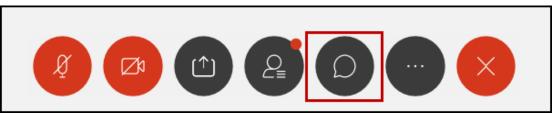
Evelyn.Dyson.Lee@irs.gov

469-801-1598

## **Questions?**

### Send your question by Chat:

• Open the Chat panel



- In the Send To or To drop-down list, select the recipient of your question
- Type your message in the **Chat** text box, then press **Enter** on your keyboard.

Working Together to Serve Diverse Communities: A Virtual Resource Fair



ADMINISTRATION FOR FAMILIES







## Federal Reserve Bank of Dallas

U.S. Small Business Administration















# **THANKS!**