

# **Working Families Tax Credit**

## **Listening Sessions Report**

### **November 2021**

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## **BACKGROUND**

The 2021 Washington State Legislature passed ESHB 1297 which expands eligibility and funding for the Working Families Tax Credit (WFTC) program. This program is intended to support Washington's moderate-to-low income working families and individuals.

The Department of Revenue hosted four online listening sessions in early November to hear from community stakeholders about key process areas for the Working Families Tax Credit (WFTC) program. During each session, the community stakeholders were provided the opportunity to provide feedback on eligibility, identity verification, the application process, and customer service. The input received will help guide the rulemaking process for the administration of the program.

## **LISTENING SESSIONS APPROACH**

Online listening sessions were held via WebEx and included a facilitator, host, note-taker, and a team of panelists. In the sessions conducted in languages other than English, an interpreter was also present. Each session covered the same questions.

Listening sessions were promoted through newsletters, stakeholder contacts, and the Department of Revenue's website.

During these sessions, stakeholders were invited to provide their feedback both verbally and via chat. These listening sessions were not recorded, and all feedback was kept confidential. For members of the community unable to attend the listening sessions, a survey was also available that included the same questions and themes as shared in the listening sessions.

Online listening sessions were held:

- Thursday, November 4 at 6 p.m.
- Tuesday, November 9 at 1 p.m.
- Tuesday, November 9 at 6 p.m.
- Saturday, November 13 at 10 a.m.

Total attendees: 62

Attendance rate: 60%

Total comments collected: >340

Listening sessions and the survey were offered in the following languages:

- Chinese
- Khmer
- Korean
- Lao
- Somali
- Spanish
- Russian
- Vietnamese

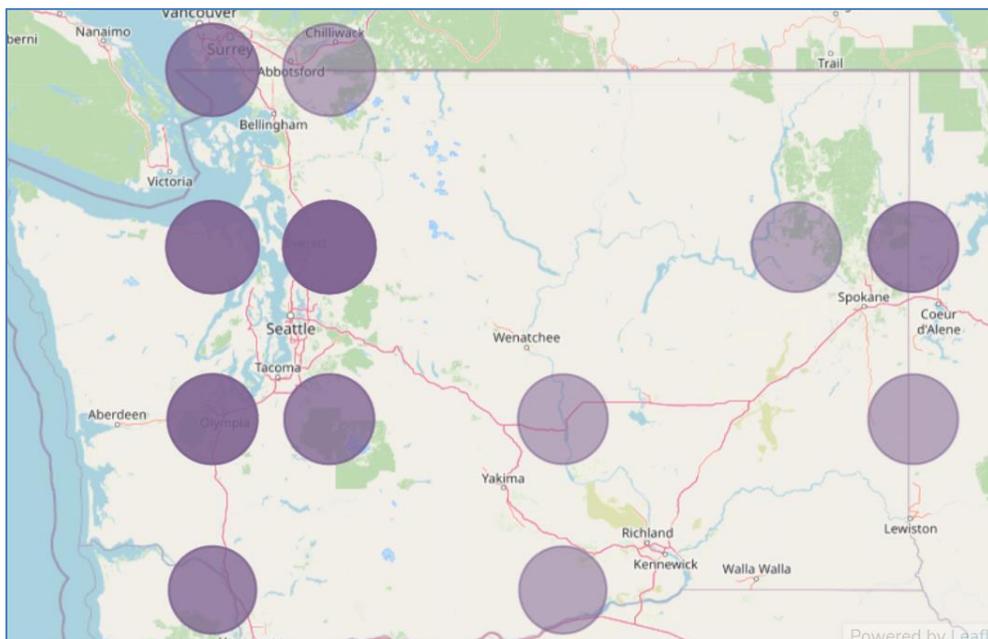
Registrants requested and DOR supported listening sessions in the following languages:

- Korean
- Vietnamese
- Spanish
- Mandarin

## **SURVEY RESPONSES**

We received 79 total survey submissions including:

- 70 responses from Washington
- 1 response each from California, Florida, Illinois, Oregon, and Texas
- 1 response each from the Russian Federation and Netherlands
- 2 responses geodata undetermined



*SURVEY RESPONDENT GEODATA LOCATIONS IN WASHINGTON.*

# KEY FINDINGS

## PROOF OF IDENTIFICATION

***The WFTC requires that an applicant prove their eligibility. If asked to provide proof of identification, what could you provide to us?***

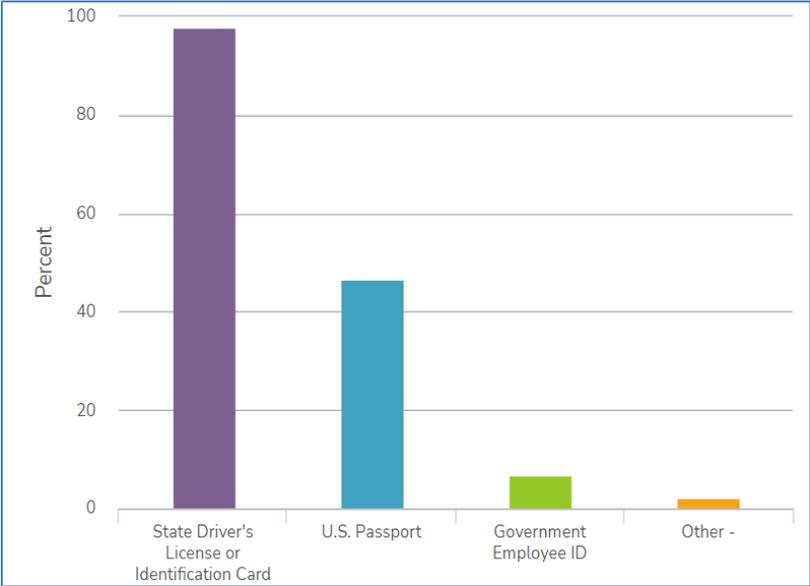
### Feedback themes

Responses in both the listening session and survey shared a few common themes. Many participants urged the Department of Revenue to be as broad as possible in accepting copies of multiple forms of ID with a name and a photo. Revenue also received feedback to accept a non-photo ID like Social Security cards or birth certificates. A few respondents expressed concern or inquired about data protection of their information online. Common themes for proof of identification include:

- Driver’s license
- Passport (U.S. and foreign)
- Employment badge/ID

### Survey responses

*The WFTC requires that an applicant prove their eligibility. If asked to provide proof of identification, what could you provide to us?*



PERCENT BY TYPE OF IDENTIFICATION

## Listening session and survey comments

- Employment badge, driver's license, passport, and Costco card.
- Residency-passport.
- I am not in the target population so will not answer this question for myself, however, would encourage the department to accept multiple forms of verification using a point system (documents could include passports, driver's licenses, employment IDs...etc...)
- Hi there - for proof of identity, it will be important to have the broadest possible acceptance of identification. Anything kind of identification with a photo and name (school id's, work badge, etc.)
- For proof of residency, any piece of mail with an address. If submitting an online application, will simply your address work? It should!
- Can folks use utility bills?
- One form of identification, or multiple?
- Would identification be for the parent receiving the payment, or for the child?
- To file online, is it necessary to upload this proof, or are there other identity definers online? Recommend as low barrier as possible, such as a picture from a phone.
- Any security concerns as far as uploading photos of state identification or a passport? Are those pictures protected by the state?
- Protection, documentation?
- Currently, SS cards don't have photo. Can people use SS card?
- Washington State Driver's License.
- Driver's License.
- Drivers License and Passport.
- I could provide my social security card, but I would feel more comfortable with just my ID.
- Birth certificate.
- Recommend that you use a broadest possible form of ID (like anything with a name/photo).
- I second preference for ID card, nothing that must prove citizenship.
- I could provide a WADL. Plus, have possibly last 4 of SSN.
- Utility bill or pay stub.
- Please consider medical records or foreign IDs, and birth certificates.
- Driver's License – available for most individuals in the state, regardless of immigration status.
- Thinking more broad, other IDs that have the Name and Photo Identification – such as Student IDs, Work IDs.
- I would be ok with providing my license and SS card.
- What about alternative forms of ID? Perhaps Birth Certificates, SS Card, Proof of Residence.
- ITIN card or letter, it would be good to make sure that ITIN filers have low-barrier options.
- When we consider young teenage parents, ID for them isn't always readily available.
- Passport from applicant's home country.
- Let's consider a parent that isn't 18, perhaps an adult that does have ID could authenticate their identity.
- Not everyone in the Spanish speaking community has access to the same ids. Need to think what the Department will do with people that can't have a SSN, birth certificate or id.
- Concerned about the Spanish community not having access to have a SSN. They have ITINs. Should make diffusion and make it clear that ITINs would be accepted.
- There is a challenge of access to these documents. Not everyone can get these is there something else that will be considered?
- Washington State Driver's License

## PROOF OF RESIDENCY

***The WFTC requires that an applicant prove their residency. If asked to provide proof of residency, what could you provide to us?***

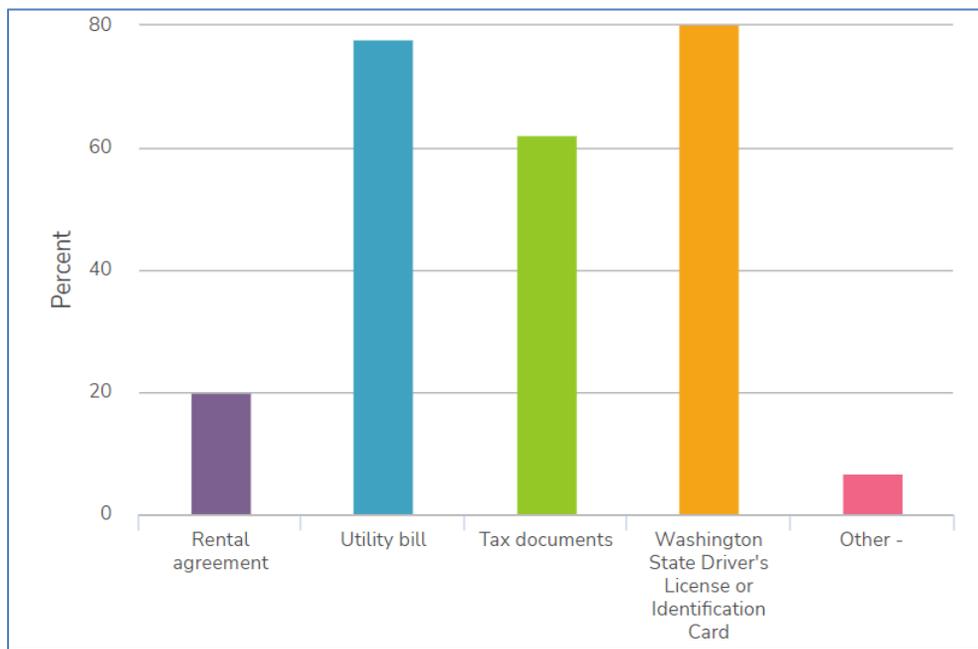
### Feedback themes

Responses in both the listening session and survey shared a few common themes similar to the feedback offered for proof of identification options. Many participants requested that the Department of Revenue accept as many forms of proof of residency as possible, ranging from a testimonial by the applicant or voucher letter from a community organization to providing copies of rental agreements and utility bills. Responses indicated that there needed to be an avenue for unhoused applicants to provide proof of residency. A few respondents asked that Revenue accept other benefit verification letters/paperwork/statements as well. Common themes for proof of residency include:

- Testimonials
- Utility bills (including online statements)
- Rent receipts/rental agreement

### Survey responses

*The WFTC requires that an applicant prove their residency. If asked to provide proof of residency, what could you provide to us?*



PERCENT BY TYPE OF PROOF

## Listening session and survey comments

- For the EITC, a verbal testimonial works, would that work for WFTC? (e.g., verbal stating they resided in WA for 180 days or more).
- If a testimonial would not be able to be accepted, I would encourage that multiple forms of proof of residency be accepted (such as utility bills, mail from a bank, rental agreements, letter from CBO as named by this participant).
- Community organization recognition and verification for residents, such as homeless recipients, that are known in the public?
- What about a doctor? Through local housing agencies, will take a letter from a doctor stating they are homeless for past six months.
- Agree, testimonial would be a low barrier option. Provided example of sister living in household and couldn't provide residency because utilities were not in their name. (Personally, I have a similar situation. I have a renter, and all utilities are in my name. \*\*\*proof of employment may work.).
- Having done free tax preparation for the IRS funded Volunteer Income Tax Assistance program, a testimonial should be the highest priority as it is in line with the federal tax credit.
- Utility bills – rent receipts – statement from landlord.
- Utility bill and/or paystub.
- Rental agreement, mortgage statement.
- Address and utility bills.
- Rent or mortgage payment history.
- The broadest possible set of proof of options proving residency should be considered, including public benefits verification letters and utility bills.
- Recommend aligning with the IRS standard of a testimonial and then in the event that there is need for proof, having a broad set of options for folks to provide proof (mail/paystubs)
- I would like to see a variety of methods be available as my landlord and I do not have a lease agreement and he works out of state a lot and may not be able to fill out a statement.
- How is this information being submitted? Secure portal? PDF? My concern isn't submitting the documents, but how they are submitted to the state.
- Community Based Organization letter of recommendation/testimonial vouching for the person.
- *Thank you for addressing the confidentiality concern.*
- Would testimonials need to be notarized?
- Mail at a home or PO Box might not be an option for folks that move often. Suggest providing other options that people can fulfil in those circumstances, such as school records or other alternative forms to show residency.
- Would the department be open for an unhoused person claiming the credit, and assuming a recommendation for a Community Based Organization voucher option being approved, would the department be open to other community documentation or testimonials?
- Utility bills (emails)
- What about WA residents who are experiencing homelessness but may qualify for this tax credit?
- Driver's licenses
- Would pictures of documents suffice or will the Dept. only accept scanned copies?
- Don't have an official answer. Do recognize the need to make this as easy as possible. Document as recommendation and will provide an update in the future.
- Highly recommend the use of pictures of documents.

- Utility Bills
- Un-housed folks might be able to use benefit paperwork, or the other docs you mentioned.
- Notarized letter from landlord that includes a timeframe.
- List of addresses only. It could be hard for multi-family households to have utility bills under their names.
- I can provide utility bills. I am not able to provide a lease as I do not have one with my landlord.
- Would like to call attention to individuals that have lived in shelters or homeless encampments. May be hard to show "residency" with a lack of documentation.
- Would it be possible to provide something from DSHS showing that assistance is given to individuals?
- Driver's license usually has the address on it to verify the address for residency. Use the energy bill.
- Water/utility bill
- Embassy documentation
- There is a challenge of access to these documents for migrant workers. Not everyone can get these is there something else that will be considered?
- Utility bill

## PROOF OF INCOME

### *If asked to provide proof of income, what could you provide to the Department of Revenue?*

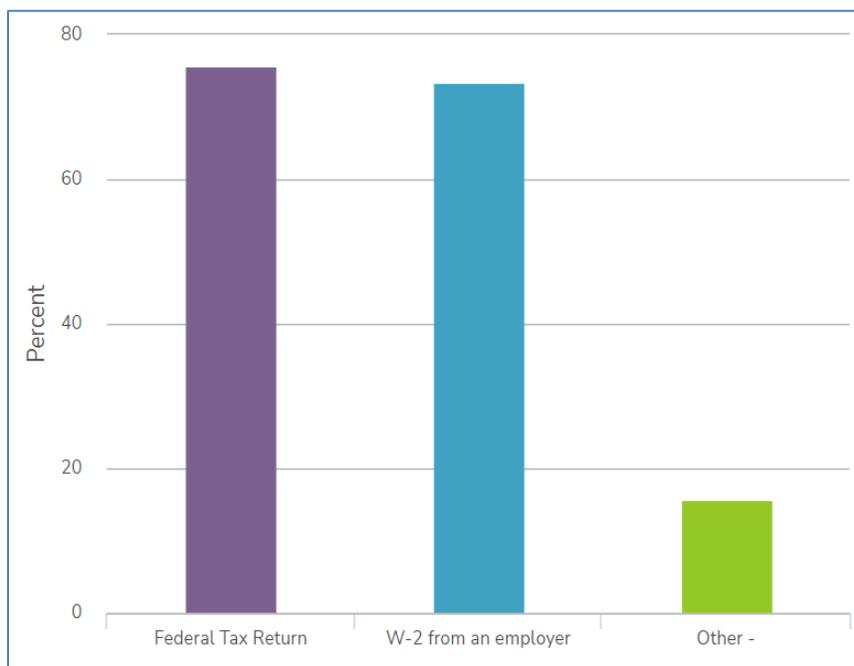
#### **Feedback themes**

Responses in both the listening session and survey shared a few common themes for proof of income options. Many participants requested that the Department of Revenue accept as many forms of proof of income as possible, ranging from a testimonial from an employer, pay stubs, copies of bank/tax statements, and copies of federal tax returns. Responses indicated that there was a desire for the program to provide an avenue to prove cash income. Common themes for proof of income include:

- Pay stubs/statement from employer
- Bank statements
- W2/copy of federal tax returns

#### **Survey responses**

*If asked to provide proof of income, what could you provide to the Department of Revenue?*



PERCENT BY TYPE OF PROOF

## Listening session and survey comments

- Pay stubs, proof of disability benefits, proof of awarded from DSHS.
- For paperless, easiest way to transfer paper paystub is to uploaded document.
- To be as broad as possible, to accept any form of payment. Such as self-employment, written documentation, cash receipts.
- or proof of income: copies of either latest pay stub, tax return.
- How does the WFTC deviate from the IRS forms for proof of identity, such as W2s, written documentation for self-employed, tax documents, etc. Is it possible to accept other forms?
- If a testimonial would not be able to be accepted, I would encourage that multiple forms of proof of residency be accepted (such as utility bills, mail from a bank, rental agreements, letter from CBO as named by this participant).
- Having done free tax preparation for the IRS funded Volunteer Income Tax Assistance program, a testimonial should be the highest priority as it is in line with the federal tax credit
- Pay stubs.
- Bank statements.
- All documents that prove income like W2, etc.
- Statement from employer.
- IRS Transcripts.
- SSI/public benefits verification letters would once again be a good option.
- I am completely comfortable with tax statements or W2.
- For self-employed people or those who work without an employer, written logs.
- W2, pay stub, bank statements, tax returns.
- Statement from employer for those who might be paid in cash.
- Copy of their Federal return.
- Copies of reports filed with DOR.
- Could this get rolled into completing a federal tax return?
- It seems like a lot of the confirming information would be proved for a federal tax return.
- Statement from an individual who cannot provide a full 12 months of income.
- How do you provide benefits to those paid under the table? How would one attempt this?
- It should be linked to their federal tax return so that income reported in consistent.
- If someone has multiple jobs throughout the year, and may have some W2s and not from others, is the department opening to having a mix of sources for proof of income?
- Letters from employers
- Pay stubs (electronic or paper)
- W-4, pay stub, tax return
- Not sure if it would really work, but maybe bank statements
- Workers who get cash payments can submit calendars with their hours and payments with personal attestation letter
- Pay statements from App-Based services (Uber, Lyft, Doordash, etc.)
- Maybe benefit paperwork for benefits with an income threshold below the proposed limit
- Copy of work hours or personal attestation
- Echoing the solutions for cash based
- Many workers like domestic workers have text messages with the documentation of hours and payments
- Bank statements with direct deposit.
- For income I can provide pay stubs and tax statements.

- Provide a deposit statement from banking institutions but may not be comfortable providing the full statement.
- How can homeless families who don't have employment provide proof of income?
- Some employers may pay in cash only. Some workers might be working under multiple names.
- Check stub and/or paycheck receipt.
- Most may have paystub/cancelled checks
- Previous year's tax return
- How will migrant workers who qualify and only work part of the year be considered?
- How will those who work for cash with no documents of pay be considered?
- Is there a min/max income to qualify? What is the qualification threshold?
- Will WFTC try to link the application process with the federal tax submission process?
- Pay stub

## CLAIMING A DEPENDENT FOR TAX PURPOSES

### ***What issues have you faced when attempting to claim a dependent for tax purposes?***

#### **Feedback themes**

Responses in both the listening session and survey shared a few common themes concerning issues faced when claiming a dependent for tax purposes. Many participants identified the issue of multiple people claiming a dependent as well as the importance of clear guidance. Additional feedback around accommodating applicants that may experience a delay in receiving or renewing an ITIN and offering a clear and secure dispute process was also shared. Common themes for issues when claiming a dependent for tax purposes include:

- Difficulty acquiring Social Security numbers/ITIN numbers
- Multiple people claiming the same dependent

#### **Listening session and survey comments**

- Issues come up when multiple people try to claim one dependent. Will there be a process to dispute such claims within the department?
- For the dependent question, less of a recommendation, but raising the issue of dependents not necessarily residing with the claimant (but the claimant may still be financially responsible for the dependent).
- No issues on my end personally.
- I've seen issues where unmarried parents both try to claim their kids as qualified for EIC using the 50/50 custody agreement as proof.
- Qualified dependent regulation.
- Multiple people claiming the same dependent – recommend making a clear dispute process for people to follow, with additional security parameters for people who are survivors of intimate partner violence.
- Difficulty acquiring social security numbers for dependents are barriers for being able to claim a dependent.
- Must the qualifying children live in the US? The qualifying child must live in Us.
- Many eligible immigrants have children that are their dependents but who still live outside of the country. So, so those children qualify for the credit? Document this and will provide clear guidance
- If parent is claiming a child that has an ITIN, but the ITIN has to be renewed, is the Department open to processing the payment if the renewal process for the ITIN is still pending? We will document this as a concern, and we will look to provide clarity and options for those who are renewing their ITINs.
- Feedback not given in other listening sessions: We have received lots of questions from community organizations doing child tax credit outreach. One of the most common issues reported was divorced or otherwise separated parents attempting to claim one child at the same

time. Communication on this in advance or a call center to help potential applicants understand rules would be helpful.

- Just general confusion with applying to an ITIN
- Parents may not be listed on the birth certificates or listed under different names.
- Parents claiming children when they are not legally entitled to would be a concern to me.
- Children who suddenly must be taken care of by parents, grandparents and who may not have been in residence at time of tax filings. Or other relatives.
- Look at income after taxes. Set the income amount for after taxes payment
- I'm only able to claim my child every other year but contribute 100% financial support. Because of this, I believe I am entitled to claiming him every year that I am 100% financial support.
- I did not collect my salary from 12 years
- Administrative errors on the part of IRS or my employer
- Social of dependent
- too old; not related biologically close enough
- I have no dependents
- I have 2 children. I claim my oldest on my taxes and my ex-husband claims the youngest on his every year although my primarily lives with me.
- No dependent
- Inequality of funding parameters
- How will DOR/WFTC reach the agricultural workers who work seasonal or part of the year in rural areas?

## APPLICATION PROCESS

***To qualify for the WFTC you must file a federal return. Since all federal returns are due in April of each year, the Department of Revenue plans to allow applicants up until December 1st to submit an application. Is this enough time to submit an application (February to December)?***

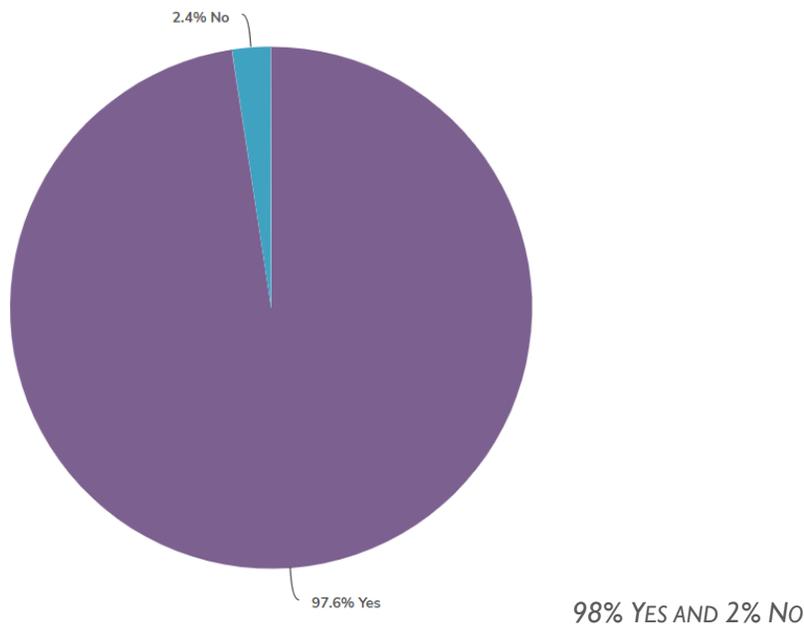
### Feedback themes

Responses were favorable that Revenue accept applications to December 1 each year. Participants shared that they would like the period of previous tax years to align with federal tax rules. Additional feedback about the importance of education and outreach about the credit and its deadline to potential applicants and community partners was shared by several participants. Common themes concerning the open application period:

- This application period allows most applicants time to file.
- Aligning federal and state tax deadlines together would be preferred.
- Outreach and education tailored to applicants, tax preparers, and community partners are key.

### Survey responses

*The Department of Revenue plans to allow applicants up until December 1st to submit an application. Is this enough time to submit an application (February to December)?*



## Listening session and survey comments

- At the federal level, there is four years to claim refunds. Will that be the same for WFTC? Recommend that the Dec. 1 timeline seems reasonable, but would like to see the refunds in line with the IRS with a 4 year lookback.
- Deadline: investing in strong relationships with community partners to reach out to same population. To align together. Dec. 1 is an agreeable deadline.
- Sign up for services through Washington Next or through affordable healthcare, open enrollment with DOH, Washington Connections (DSHS).
- Outreach in multiple languages.
- DOR should provide over-the-phone assistance to anyone fill out the application over the phone?
- I think it would be.
- Yes.
- That's a very generous application period. Is there discussion to include the ability to apply for prior missed years?
- Yes – that is plenty of time except for people who have filed a tax extension or that are behind on filing their taxes.
- Invest in community outreach.
- I think that is plenty enough time to complete the application especially if we were told ahead of tie what information I will need to gather to make sure I am ready.
- At the federal level, there is a multi-year window of time to claim all eligible refunds. Dec. 1st seems like a reasonable timeline but would recommend folks have the same amount of time to claim all refunds.
- I assume that this would be reported via secure access WA so that it would be an online process?
- Yes.
- I think tying the federal and state tax together would be ideal and streamline the process.
- Community investment to support outreach and navigation. Additionally, if there can be technical support from DOR, like to help folks fill out the application over-the-phone, that would be amazing.
- Or I guess maybe when taxes are done, get 2 copies, one for the state and one for the IRS.
- Attended last listening session but adding here: resources and the application being available in other languages would help people meet the deadline, especially if paired with strong community partnerships with community-based organizations, health care providers...etc...
- Yes
- I don't understand this explanation of application process, can you expand?
- Continue to recommend that the Dec. 1st is a great deadline, however, people should be able to claim all eligible refunds for the 3 tax years following (in line with the IRS' policy on federal refunds)
- Offer support/help in filling out applications, or resources to get that support
- Additional support for ITIN filers in navigating the application
- In thinking about the backlog for valid ITINs, would it be possible for ITIN filers to have more time to apply, or to apply without an ITIN/with an expired ITIN (either for self or children), but not get a rejection until the IRS is able to process that ITIN application? A lookback period would help, as one other commenter just suggested.
- Host informational sessions in multiple languages, have the website translated, have FAQs in multiple languages
- I thought you'd just do this as part of filing taxes at beginning of year

- Additional support for ITIN filers in applying for or renewing their ITINs
- Do a training for non-profits who can do application clinics
- Provide applications (and instructions) in multiple languages
- When I do taxes online through the free option, the system automatically looks for my eligibility for federal tax credits, it would be awesome if it were possible for it to connect to the state WF tax credit too
- Have a recommended timeline for those who also have to apply for an ITIN for either themselves or their dependents
- Also, highly suggest training and coordination with the free in-person tax return preparers who focus on the EITC
- (if support was offered in a year round way with Certified Acceptance Agents, we could potentially see more folks being able to apply for the WFTC)
- Certified Acceptance Agents help process ITINs
- Training for nonprofits to assist with applications is a great suggestion! I would add that the department ensure that nonprofits get funding to support applicants.
- The Dept. could offer free Certified Acceptance Agent support for ITIN filers
- Provide support to trusted orgs because again, this brief explanation is not enough to understand the process.
- And many communities that have been excluded from benefits will be learning something new
- More information is needed about the application process to determine if the dateline is accessible for families.
- Would it be possible to give people a list of the things they will need to have ahead of time to prepare and make sure they meet the deadline? I do feel that Feb to Dec is a perfectly reasonable time.
- Sounds good, however could more time be allowed due to COVID implications?
- Extended period of time would be good

## AMENDING AN APPLICATION

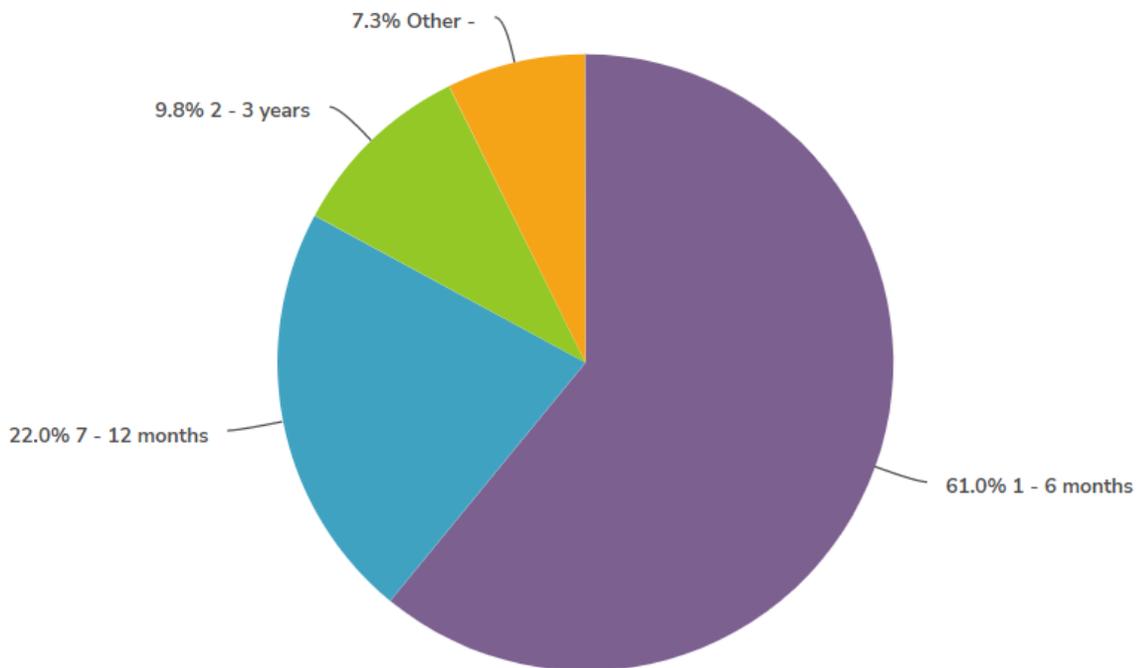
***Applicants are required to notify the Department of Revenue if they need to amend their application for any reason. If you made a mistake on your application, how long would you need to notify us and correct the error?***

### Feedback themes

Feedback from both the survey and listening session show that a minimum of 6 months would be an acceptable amount of time allowed to amend a return. Additional feedback for amended period was 1-5 years and alignment with IRS rules. Participants shared concern about the audit and overpayment process and a desire to have a simple amendment process with support for helping applicants amend their applications.

### Survey responses

*If you made a mistake on your application, how long would you need to notify us and correct the error?*



PERCENT BASED ON TIME PERIOD TO AMEND

## Listening session and survey comments

- Recommend the longest grace period as possible and align it with the amount of time a refund would be available, ideally four years.
- What happens when an applicant makes an error and receives an overpayment, what does that payback process look like? Recommend different languages, and not to “target” recipients as being a target for error, but how to rectify going forward?
- Amending returns at the federal level can be quite complicated, would imagine possible on the state level. Recommend simplifying process and forms to reduce errors is most ideal.
- At least 90 days.
- RE: four-years, the language is statute of limitation is 3 years past filing date. Applicant needs to understand the statute of limitations. That it’s a two-way street. Needs to mirror the IRS and be clear it’s for both sides (taxpayer and department).
- Edit online in real time? Any idea of when the payment goes through? For example, if applied for in Dec., when is payment expected to be received? This will dictate how much time to allow for amendments.
- Within the general application period.
- Additionally, people living in rural areas may be at higher risk of missing out: a strong focus on outreach in rural areas (including tribal lands) could help people reach this deadline.
- 5 years.
- I think 6 months would be a sufficient window for corrections.
- 3 years after the year end. 2022 could be amended until 12-31-2025 for example.
- Maximum time possible, however, to make sure that amendments/fixes happen quickly, a simplified form or technical support would be really helpful.
- The broadest timeline that accommodates for families that work irregular hours or may need further assistance in correcting the error.
- How or will an applicant be notified if they’ve made an error?
- Six months.
- Would there be a possibility of being audited if you report different income when you file your taxes?
- Would amending the application impact the timeline of receiving their payment? We will document this; it likely depends on when the adjustment or amended takes place. Hopefully provide guidance when we have the opportunity to talk again.
- For filers with low incomes (TANF recipients, for example), could the Department wave repayment of overpayments? Take this into consideration and hope to report on this in the near future as well.
- If they have to amend and find out they owe money back
- As much time as possible, with non-threatening language from the gov agency request the correction and providing adequate support by customer service with language supports
- 1-3 years
- Additional support for recommendation to waive potential overpayments, especially if applicants are unable to pay. In consulting with benefits attorneys, this is already happening at DSHS.
- When the user interface is developed for the online application, is it possible to go back into the application, To amend online? Will it be easily accessible? Currently in the process of

- building out the program and the system. We can investigate the feasibility of this. We want to make the amendment process as easy as possible. Will document this.
- Depends on when the error is discovered. With that, 6 months seems reasonable.
  - I think by the end of the current tax year is acceptable.
  - One to two years.
  - Depends on the change, a simple name or address is one thing, income is another. Household members should be accurate for the income tax docs
  - To fix a mistake 6 months wouldn't be enough.
  - 6 months and a year would be okay.
  - Agency needs to give more information on how to amend something if they need to. Some of the questions or inquiries usually have are: how will we notify them, are not sure on how to start applying, how do they make changes, and if they need to make changes in writing or how?
  - How long must one save the tax filing information and for how long?
  - 6 months too little
  - Need enough time between notification of error, correction and refiling. Need at least one year.
  - If we make a mistake on the IRS (federal) taxes do we have to notify DOR/WA?
  - How will people be notified if there is a mistake? Can we apply on paper? Online only?
  - One year is good

## CUSTOMER SERVICE

### ***What is the single most important thing that we can do to help Washingtonians apply for this credit?***

#### **Feedback themes**

An overwhelming number of responses requested that Revenue provide an easy to use online, mobile-friendly, and accessible application process as well as readily available customer support. Another common theme was robust outreach and multilingual materials with clear and simple directions. Feedback themes included:

- Providing an easy-to-use online portal.
- Communications and outreach materials made available in multiple languages and multiple channels (video, in-person, flyers, and information stations)
- Live call center assistance especially for people who have digital equity issues.

#### **Listening session and survey comments**

- Have as much technical support as possible in the department, to be able to help an applicant complete application over phone, answer questions in person, etc. and to make the application as streamlined and accessible as possible. To not make the application more than a page or two. To make it as easy to navigate as possible.
- Recommend: Access Washington login to have a one-stop place for Washington citizens to provide information, login, and access services.
- For the customer services aspect, ensure their navigators are able to really speak languages that we expect applicants to speak. It's disheartening to hear an applicant has an English-speaking person answer and then hang-up, not understanding the cultural components. Treat everyone with dignity. Resources in the community letting folks know there are people here to help and want to. Accurate translations. And finally, ensure there are resources (e.g. laptop, device) to apply for the credit.)
- A way to check the status of the application. For partners to help provide support and assistance, and to build relationships. Strong community partners.
- To request grants to help facilitate these recommendations.
- At least English and Spanish translations.
- Mobile solutions, strong communication, and keeping applicants informed of status.
- Provide grants to local community partners to help assist people with application.
- Prompt communication - within 24-48 hours could be a good window of time
- Providing an easy-to-use online portal.
- Outreach materials being made available in multiple languages.
- Provide live call center assistance especially for purposes who have digital equity issues.
- Streamline the process.
- Robust funding to community groups to support outreach & navigation support; technical and timely assistance (within 24-48 hours); easy to use online portal available in English and Spanish (minimum); technical support in language other than English.

- Community outreach centers would be great to help people make sure they are able or even help them apply. This would be great for people who have limited access to internet.
- Educated tax related agencies and companies.
- Community outreach have roving teams to go to underserved communities. Lots of call center people for those without internet.
- Use existing CBO's and other community service provides for call center, navigation and outreach assistance.
- Incorporating outreach to schools/and other community dedicated spaces?
- WA-211 and its network of call centers should definitely be utilized to provide outreach.
- Create a user interface that is easy to navigate, doesn't look/feel like a government website, is accessible to do on a smartphone, and is available in English and Spanish online (at minimum)
- For immigrants and for better language access, also use videos for outreach
- Language access in both materials and actual people to speak to!
- YES to videos!
- Public information campaigns and partnering with non-profits
- do a lot of work to make sure everyone is aware of the credit, lots of publicity
- Work with orgs that can support workers in filing out apps
- Supporting community-based orgs with training and financial support in order to work directly with the people they work with every day
- Funding nonprofits to help with outreach
- Many immigrants may worry this will incur a Public Charge. Ensure immigrants are informed on whether this credit can affect them later in their immigration process or not.
- And advocates too
- Community have stated the bad treatment they've received when engaging with LNI and other agencies, learn from this and do cultural change to provide better access
- Less complicated terminology; Information stations or live assistance from DOR.
- Offer in-person support with the application process and education/info in Spanish that is clear and easy to understand.
- Ensure, as much as possible, that information can be pre-populated or that people are automatically enrolled.
- Ad campaigns posted in popular stores.
- Make sure people that do not have access to internet have a way to apply. Can it be a service that is added by a professional tax preparer (e.g. H&R Block)? Could assistance be available through a community action program?
- To ensure all will participate and know about this, it would be great if you can send emails as well as through public community media and all media in WA, and to collaborate with ethnic media to offer a different outreach. Thanks.
- Keep it simple!
- Don't make eligible Washingtonians apply: instead figure out who gets the credit and push the benefit out to them
- Be clear about the eligibility and requirements needed for people to file.
- Have reps temporarily co-located at different nonprofit and government agencies, community engagement and outreach, etc.
- Have regular emails & website posts for families to reference. Set up a personal account system with a log in to manage the changes & send message just like health care providers.

- Credit check
- Not make it available!! Washington does not pay an income tax so refunding a tax that doesn't exist is beyond asinine!! Spend our money better!
- Clear and accessible public information
- clear rules on eligibility
- Be available
- Accessibility and language access for customers and support for community organizations doing outreach and education to marginalized and low-income communities about the WFTC
- Provide tax credit overview, application, and assistance in many different languages. Have a virtual help desk over Zoom at various hours of the day along with a phone line.
- The community I live in, not everyone has access to internet so it would be important for us to have another way to sign up. Is there any way we could have it just added to the process when we file our taxes? Maybe an app or at least make the website mobile browser compatible?
- In language support, long time frames, in person outreach to marginalized communities, try to find ways to notify people in a collaborative fashion if something has gone wrong.
- Expand credit allowance in upper third of eligibility. Stop rewarding having children without the means to support them by creating a tier system of credits based on length of current employment, both parents employed, and number of dependents with a cut-off at two.
- Include application with tax return
- make it easy. also, I read on the web site the 4 examples of different families qualifying for the credit and I think the married couple earning \$300,000 (example No. 4) was ridiculous - with only 2 kids they can afford childcare on an income of \$300,000. That's not low income!
- Clear, readable and layman terms.
- Online application and not a lot of heavy fighting over documents. And recertification should be verify by automatic match with the irs
- easy online application process. Awareness of who is eligible.
- Give the credit to people without children. This is a very prejudicial credit and leaves many hardworking people and seniors (who will be paying for this benefit to others) without the added support.
- Electronic Signature
- Just keep the outreach going
- improve your customer service
- I would say it should be a sliding scale, especially to help low-income families
- workshops.
- convey information through schools, licensed daycares, pediatrician offices, midwife/OB offices
- Allow people to do it when you file for your federal taxes
- Make it easy and online, but with good checks and balances. (No one wants to see another unemployment fiasco...)
- Make the application all online and mobile friendly. Save progress as you go so you don't have to do it all in one sitting. Have a robust FAQ section. Use already on hand info you have about residents (cross reference existing databases) to limit the amount of info you need to gather from residents.

- Keep it simple. Make it available in many languages. Have a good website that clearly explains what to do. Have a well-staffed support line where people can call with questions
- they have a credit from government a source their can trust
- Notify them via Facebook or phone #
- Make sure robust outreach to orgs and communities is done and that it is multilingual, multi-cultural, and multi geographic.
- Outreach, outreach, outreach! Make sure, at some point, that there isn't a cliff in terms of eligibility - that higher-income folks without kids or one child aren't phased out of the program too quickly (because they are as deserving of the credit as higher-income recipients with two or more kids) - so adjust the rates to match intent of original legislation (\$50 minimum credit amount at maximum qualifying income). Clarify the ability for DOR to yearly recalculate rates given the credit's eligibility won't align with federal policy down the road because the credit amount is adjust for inflation (or decouple it from federal EITC). Lastly, just make the application process as streamlined as possible so that folks can assess these funds. Times are tough.
- Proposed using entities that already have connection or are trusted and are accessible to Spanish speaking communities.
- Proposed to use the counties as facilitators of the information as well.
- Use of media/radio
- Having people from our community be involved in the education that will help with barriers, language, and technology issues
- Education materials need to be clear and not confusing
- Very legal language may get lost in translation – need basic language
- Requests for future updates to come as email is great because it can be stored and accessed anytime
- Communities with technology barriers phone calls would be great.
- Communication (word getting out)

## COMMUNICATIONS

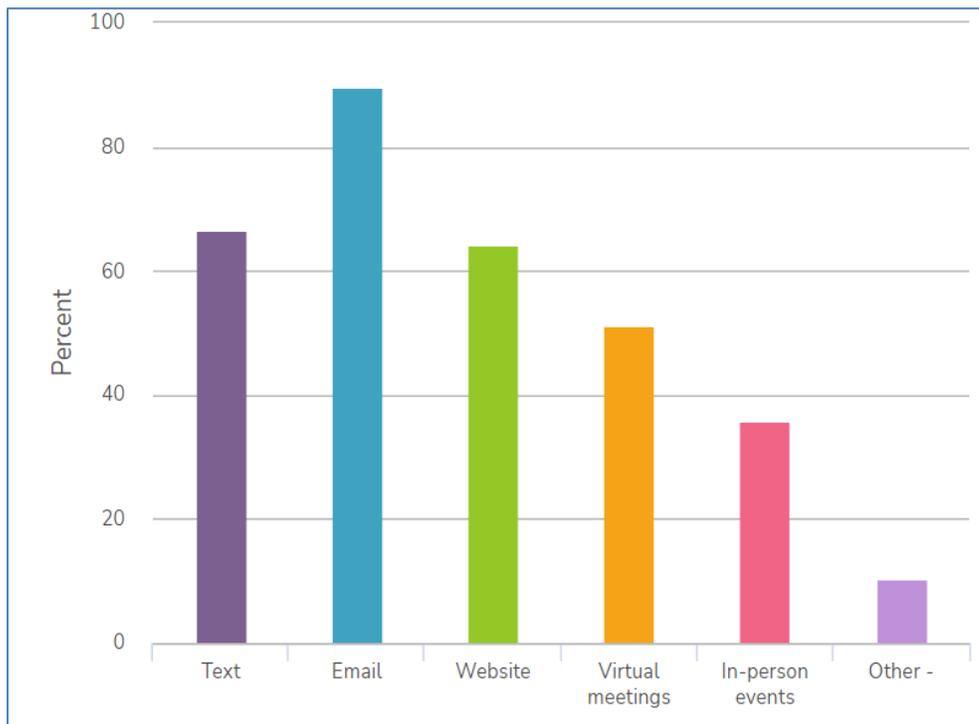
### *How should we communicate with you about the Working Families Tax Credit?*

#### Feedback themes

Email, text, and website updates were the most frequent responses with over half of participants requesting an electronic form of communication. Leveraging community resources was also heavily requested including outreach to health centers, public libraries, community centers, and grocery stores. Common themes for communication channels were:

- Text, email, and social media
- Postal mail
- Support hotline that provides assistance to nonprofit organizations and community partners

#### Survey responses



PERCENT BASED ON COMMUNICATIONS PREFERENCE

## Listening session and survey comments

- Timely communications to resources the community work closely with.
- All of the above - especially Text, social media, Events - virtual and in-person when safe to.
- yes, all of the above and work with community orgs that have a trusted messenger model.
- The \_\_ time model has worked successfully, specifically the outreach this past year.
- Email.
- "Ethnic Media": ensure that advertisements are put into smaller outlets, such as a radio message.
- Flyers in Workplace?
- Does DOR have social media outlets?
  - Work with Washington Community Alliance.
- Are there agreements between elected officials to discriminate information to their constituents?
- I am an educator, and our PTA is a very effective communicator.
- PTAs as well as OSPI.
- Health centers and Health associations, personal connections with their communities.
- Is the Department working with any and all benefit programs, including TNIF, WIHEEP (city of Seattle's utility disability program), etc. What are you doing to work with these programs?
- Recommend to connect with broad benefits programs like TANF, SSI, and Medicaid, and Apple Health for Kids - as well as local supports like City of Seattle's Utility Discount program or other local supports
- Text or email.
- Email.
- Text & twitter.
- Emails and virtual meetings.
- Email, text, social medial, postal mail.
- Email.
- In as many ways as you can!! Text, email, mail, social medial (twitter, Instagram, Facebook, tok-tok???), all other state agencies, all elected officials (state, federal, city, county).
- Email or set up hotline for tax related consulting that can provide assistance to nonprofit organizations.
- Texting campaign using 898211 texting provided by 211.
- Prioritize free tax prep sites (VITA) to do outreach during the 2022 and 2023 tax seasons.
- Would 211 start the application process over the phone or just educate on the steps clients need to take?
- 211 can do both. WA211 currently helps callers with SNAP benefit applications over the phone.
- email or a monthly newsletter
- email, thank you!
- Disseminating this information through public library systems could be a great way to get the word out
- Many immigrants still rely on Facebook, radio, and community newspapers-- use these medias too
- Also community clinics, ethnic grocery stores, community centers, etc.

- Partnering with community-based orgs to reach more people who wouldn't hear about these otherwise
- Email, Website updates, social media, Phone calls may not work very well. My spam blocker blocks a lot of unrecognized phone numbers and doesn't allow them to leave a voice message.
- In-person meetings to give the opportunity to ask questions by participants. Host regular information sessions at local trusted places like community-based organizations, schools, etc.
- Thank you, DOR!!!!
- A recommendation, it would help to know what policies and/or practices are in place currently when offering feedback.
- Please consider sharing these through all available emails and community and commercial media and tv news. Thank you for holding the listening session.
- Have a helpline I could call with questions
- Notify local businesses to share information with staff. Have school districts/daycares/universities send out notices.
- telephone mobile
- Communicate with radio, tv, and telephone calls. People in community may not having access to email or not know how to use it and that's why telephone calls are the best, more than emails. Sometimes folks get calls saying, "we sent you an email", but they don't receive emails because of the reasons listed before.
- Proposed using a simple language and not so much legal wording when communicating or doing marketing. Communication in basic/simple language for all to understand.
- People in rural areas and people working with agriculture that can't access computers

