

Northwest Workforce Council

PO Box 2009 (101 Prospect Street), Bellingham, WA 98227 - 360.676.3209 • 2005 E. College Way, Mount Vernon, WA 98273 - 360.416.3600
265 NE Kettle St., Ste. 102, Oak Harbor, WA 98277 - 360.675.5966 • PO Box 1696 (540 Guard Street #210), Friday Harbor, WA 98250 - 360.378.4662
- www.nwboard.org -

Direct Service Information to Navigate Participants to the Federal Stimulus available via IRS

1. **Background:** The Federal Government passed an Economic Stimulus package that includes a single payment of up to \$1,200 for individuals or \$2,400 for married couples (parents also receive \$500 for each qualifying child) for eligible taxpayers who filed tax returns for either 2019 or 2018.
2. **You're eligible if:**
 - A. Have a valid Social Security number,
 - B. Could not be claimed as a dependent of another taxpayer, and
 - C. Had adjusted gross income under certain limits.
3. **You're not eligible if:**
 - A. You are 24 or younger and you were claimed as a dependent on your parents' tax return.
 - B. You're a single filer with income exceeding \$99,000.
 - C. You're a joint filer with income exceeding \$198,000 and no children.
4. **If Eligible, to facilitate getting your payment:**
 - A. Make sure you have filed either a 2018 or 2019 tax return;
 - B. If you have not filed either, file your 2019 tax return immediately (see #5. How to file a tax return below);
 - C. To get your payment in the shortest possible time, have an established bank account and use the direct deposit option when you file your tax return, see #6 (below)

In the coming weeks, the Treasury plans to develop a web-based portal for individuals to provide their banking information to the IRS online, so that individuals can receive payments immediately as opposed to checks in the mail. Keep checking the IRS website <https://www.irs.gov/newsroom/economic-impact-payments-what-you-need-to-know> for updated information.

5. **How to file a tax return:**
 - A. You may be eligible to use (click here) [IRS Free File](#) to file your taxes online if you made \$69,000 or less.
 - B. Complete this [questionnaire](#) to determine if you are eligible for Free File and if so, which Free File options are available to you.
6. **How to file a tax return if you are not eligible for IRS Free File:**
 - A. You may use the free, fillable tax forms available on the IRS website, but you will need to:
 - i. Have already filed your 2018 taxes.
 - ii. Know how to do your taxes yourself, including calculations.
 - iii. Create a new account on the IRS website.
 - iv. Complete the process by October 20, 2020.
 - B. Use an [electronic filing option](#)

7. What to do if you need to add or change direct deposit information:

- A. The Treasury will be introducing a web-based portal for people to use to provide or change their banking information for direct deposit called **Filers: Get Your Payment** in mid-April. Check the IRS here <https://www.irs.gov/coronavirus/economic-impact-payments> for updates.

8. How to file a tax return if you are not typically required to do so or have not needed to file a 2018 or 2019 tax return:

- A. If you received social security benefits (SS, SSDI, SSI), you have no action to take. You will receive your stimulus the same way you receive your social security check.
- B. The IRS has now provided guidance for those not typically required to file a tax return at [Non-Filers: Enter Payment Info](https://www.freefilefillableforms.com/#/fd/EconomicImpactPayment) with **freefile**:
<https://www.freefilefillableforms.com/#/fd/EconomicImpactPayment>

9. What documentation do I need to file my taxes?

- A. Review the [Tax Preparation Checklist](#) from the Whatcom Asset Building Coalition (WABC). For NWC WorkSource current or former participants who only have wages from paid internships or work experience, just use your W-2 form and Social Security number.

10. What to do if you have lost or misplaced your W-2:

- A. Contact your employer – (For NWC WorkSource current or former participants who have wages from paid internships or work experience, Fiscal@workforcenorthwest.org)
- B. Request a copy of or information from your W-2 from the IRS
 - i. Use the IRS's online [Get Transcript](#) tool to request your Wage & Income Transcript if you only need the information contained in the W-2 and the W-2 you need is less than 10 years old. This service is free of charge.
 - ii. For additional assistance visit "[Get Transcript FAQs](#)"

11. Where can I get more information?

The IRS will post all key information on [IRS.gov/coronavirus](https://www.irs.gov/coronavirus) as soon as it becomes available. Review the [Stimulus FAQ sheet](#) for more information.