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Important Websites

IRS

- https://www.irs.gov/coronavirus/economic-impact-payments
- FAQs about stimulus checks: https://www.irs.gov/coronavirus/economic-impact-payment-information-center
- For guidance on using the "Get My Payment" versus "Non-Filers" tools **(use as a supplement to the Screening Interpretation document if you encounter a more complex situation)**: https://www.irs.gov/newsroom/how-to-use-the-tools-on-irsgov-to-get-your-economic-impact-payment
- "Non-Filers" portal: https://www.irs.gov/coronavirus/non-filers-enter-payment-info-here
- "Non-Filers" portal FAQs about the online account: https://www.freefilefillableforms.com/#/fd/eip.faqs
- "Get My Payment" portal: https://www.irs.gov/coronavirus/get-my-payment

CASH Campaign of Maryland

- http://cashmd.org/free-tax-preparationresources/
- Form for patients to enter their information if they would like to sign up for free remote tax preparation services: https://docs.google.com/forms/d/e/1FAIpQLSdW4nHgkx0r9CtfdO9gk772xoPEYS1WemaJ8WxOS4FpftwLLQ/viewform

Consumer Financial Protection Bureau (CFPB)

- https://www.consumerfinance.gov/about-us/blog/guide-covid-19-economic-stimulus-checks/

Stimulus Check Screening & Needs Assessment

Date: __/__/__ Patient ID #: ______

Check your household's source(s) of income from 2018 to present.		**2018**	**2019**	**2020**
Group A	Supplemental Security Income (SSI)	[ ]	[ ]	[ ]
	Veteran's benefits	[ ]	[ ]	[ ]
	Social Security Disability Insurance (SSDI)	[ ]	[ ]	[ ]
	Retirement/Survivor's benefits from the SSA	[ ]	[ ]	[ ]
	Railroad Retirement Benefits (RRB)	[ ]	[ ]	[ ]
Group B	Employment	[ ]	[ ]	[ ]
Group C	State-level benefits (e.g., Temporary Disability Assistance Program (TDAP), Temporary Cash Assistance (TCA))	[ ]	[ ]	[ ]
	None	[ ]	[ ]	[ ]

Check the box(es) that apply to you regarding tax filing.	**2018 Taxes (Filed in 2019)**	**2019 Taxes (Filed in 2020)**
*I was/am required to file taxes and have done so.	[ ]	[ ]
I was/am required to file taxes, but have not yet done so.	[ ]	[ ]
I was/am not required to file taxes.	[ ]	[ ]

Have any of the following changed since you last filed taxes?** ***(If this question does not apply to you because you were/are not required to file, skip to the table below.)

- ☐ Direct deposit information
- ☐ Address
- ☐ Number of children (ages 17 and under) living with me
- ○ None of the above *(If "none of the above," skip to page 3.)*

Check whether each of the following statements applies to you.	**Yes**	**No**
I have a personal cell phone <u>and</u> can receive phone calls/text messages.	[ ]	[ ]
I have an email address <u>that I can currently access</u>.	[ ]	[ ]
I have a bank account or direct deposit card.	[ ]	**[ ]
**I have a safe mailing address. *(If you have a bank account or direct deposit card, skip to the next statement.)*	[ ]	[ ]
I have children (ages 17 and under) living with me who are <u>not</u> claimed as dependents on anyone else's tax return.	[ ]	[ ]

Screening Interpretation

If you checked…	*…then…*
income sources in Group A and have no dependents,	…no action required.
the income source in Group B, you have filed your 2019 taxes, and none of your information has changed,*	
the income source in Group B, you have filed your 2019 taxes, and your banking information/address changed…	…the IRS will use the information you originally provided; however, you can track the status of your payment using the "Get My Payment" tool.[1-2]
the income source in Group B, you have filed your 2019 taxes, but you did not originally list any direct deposit information…	…try using the "Get My Payment" tool to add your direct deposit information.[3]
the income source in Group B and you have not yet filed your taxes,	…file taxes electronically.[4]
income sources in Group A and have dependents,[5]	…use "Non-Filers: Enter Payment Info Here" tool.
income sources in Group C,	

**Patients in this situation can use the "Get My Payment" tool to check their payment statuses. It would be good for patients to have their most recent Adjusted Gross Income (AGI) amount(s), and the amounts of their past refund(s)/amount(s) owed, on hand.*

[1]"2019 Filers: We will send your payment using the information you provided with your 2019 tax return. You will not be able to change it."
[2]"**Track the status:** You can use the Get My Payment tool on IRS.gov to track the status of your Economic Impact Payment once the IRS has processed your tax return. **Note.** Get My Payment cannot update bank account information after an Economic Impact Payment has been scheduled for delivery..."
[3]"**Add direct deposit information:** You may be able to use the Get My Payment tool on IRS.gov to provide direct deposit account information once the IRS has processed your return. If this tool doesn't offer you the option to provide your direct deposit information, it means the IRS will mail your Economic Impact Payment."
[4]"2018 Filers: If you need to change your account information or mailing address, file your 2019 taxes electronically as soon as possible. That is the only way to let us know your new information."
[5]"For certain SSA / RRB beneficiaries [i.e., SSDI, retirement/survivor's benefits from the SSA, RRB from Group A] who don't normally file a tax return and do not register with the IRS by April 22, they will still be eligible to receive the separate payment of $500 per qualifying child. For those who miss the April 22 deadline, their payment at this time will be $1,200 and, by law, the additional $500 per eligible child amount would be paid in association with a return filing for tax year 2020 [If one or more of your patients is in this situation, please make a list so that we can follow up after receiving more clarity from

the IRS about how those who missed this deadline can file 2020 taxes in 2021.]. They will ***not*** be eligible to use the Non-Filer tool to add eligible children once their $1,200 payment has been issued.

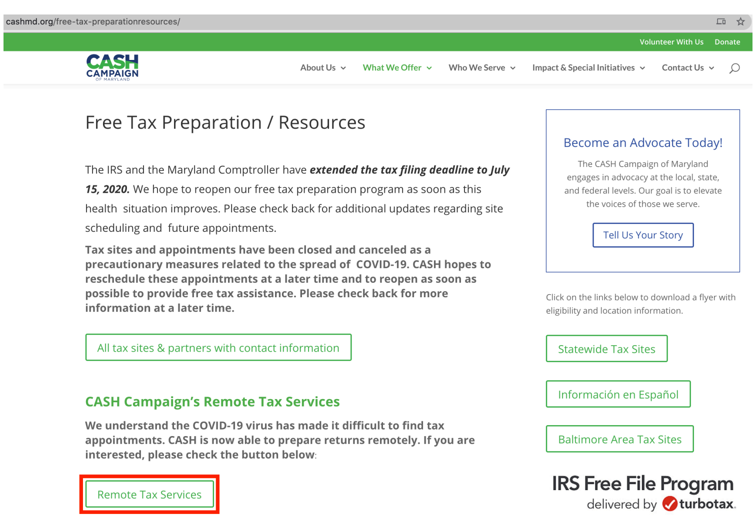
SSI and VA beneficiaries have some additional time beyond April 22 to add their children since their $1,200 automatic payments will be made at a later date. SSI recipients will receive their automatic payments in early May, and the VA payment schedule for beneficiaries who receive Compensation and Pension (C&P) benefit payments is still being determined. If they have children and aren't required to file a tax return, both groups are urged to use the Non-Filer tool as soon as possible. Once their $1,200 payment has been issued, they will ***not*** be eligible to use the Non-Filer tool to add eligible children. Their payment will be $1,200 and, by law, the additional $500 per eligible child amount would be paid in association with a return filing for tax year 2020 [If one or more of your patients is in this situation, please make a list so that we can follow up after receiving more clarity from the IRS about how those who missed this deadline can file 2020 taxes in 2021.]."

[1,4] *https://www.irs.gov/coronavirus/economic-impact-payments*
[2-3] *https://www.irs.gov/newsroom/how-to-use-the-tools-on-irsgov-to-get-your-economic-impact-payment*
[5] *https://www.irs.gov/newsroom/ssa-rrb-recipients-with-eligible-children-need-to-act-by-wednesday-to-quickly-add-money-to-their-automatic-economic-impact-payment-irs-asks-for-help-in-the-plus-500-push*

Action Plans

Check when Done	**Steps for "Non-Filers: Enter Payment Info Here" Tool Usage**
[ ]	1. Request **cell phone** from Assurance Wireless (https://www.assurancewireless.com/) or Cintex Wireless (https://www.cintexwireless.com/) by applying online.*
[ ]	2. Create **email address** once phone is delivered and activated so that it can receive the security verification code generated by creating an email address.
[ ]	3. If the patient does not have a bank account/direct deposit card, establish **safe mailing address** for at least next six (6) months.
[ ]	4. Gather information needed according to IRS' instructions (see **Information Needed for "Non-Filers: Enter Payment Info Here" Tool**) and facilitate filing.**
[ ]	5. Advise patient to monitor his/her/their email over the next 24-48 hours, including the spam/junk folder, for a **submission confirmation** email (see paragraph on page 7) <u>and</u> a **"return accepted/rejected" confirmation** email.

Check when Done	**Steps for Filing 2018 and/or 2019 Taxes Electronically with CASH Campaign of Maryland**
[ ]	1. Request **cell phone** from Assurance Wireless (https://www.assurancewireless.com/) or Cintex Wireless (https://www.cintexwireless.com/) by applying online.*
[ ]	2. Create **email address** once phone is delivered and activated so that it can receive the security verification code generated by creating an email address.
[ ]	3. Go to http://cashmd.org/free-tax-preparationresources/
[ ]	4. Click the "Remote Tax Services" button (shown below).
[ ]	5. Provide the information requested on the form.
[ ]	6. Advise patient to gather all tax-related documents before appointment.



**To prepare for possible verification-related requirements, it may help to download the patients' fee assessments from Methasoft and extract the pages (using a site like https://www.ilovepdf.com/split_pdf) containing copies of their insurance cards, EVS print-outs, and photo IDs, if available.*

***In order to successfully file online, patients must first verify their phone numbers (they will receive a six-digit verification code via text) and then verify their email addresses by clicking the confirmation link in the email sent to them.*

Information Needed for "Non-Filers: Enter Payment Info Here" Tool

Account Information *(established at beginning of process)*

Username	
Password	

Five-Digit Filing PIN *(established at end of process)*

Self	___ ___ ___ ___ ___
Spouse	___ ___ ___ ___ ___

Self

Full Name	
Current Mailing Address	
Email Address	
Phone Number	(___ ___ ___) ___ ___ ___ - ___ ___ ___ ___
Date of Birth	___ ___ / ___ ___ / ___ ___
Social Security Number	___ ___ ___ - ___ ___ - ___ ___ ___ ___
Bank Account Type (leave blank if you do not have one)	○ Checking (or direct deposit card) ○ Savings
Bank/Direct Deposit Card Account Number (leave blank if you do not have one)	
Bank/Direct Deposit Card Routing Number (leave blank if you do not have one)	___ ___ ___ ___ ___ ___ ___ ___ ___
Driver's License/State ID Number (leave blank if you do not have one)	
Driver's License/State ID Issue Date (leave blank if you do not have one)	___ ___ / ___ ___ / ___ ___
Driver's License/State ID Expiration Date (leave blank if you do not have one)	___ ___ / ___ ___ / ___ ___

Spouse

Full Name	
Date of Birth	___ ___ / ___ ___ / ___ ___
Social Security Number	___ ___ ___ - ___ ___ - ___ ___ ___ ___
Driver's License/State ID Number (leave blank if you do not have one)	
Driver's License/State ID Issue Date (leave blank if you do not have one)	___ ___ / ___ ___ / ___ ___
Driver's License/State ID Expiration Date (leave blank if you do not have one)	___ ___ / ___ ___ / ___ ___

Children/Dependents

Full Name	**Social Security Number**	**Relationship to You/Spouse**
	___ ___ ___ - ___ ___ - ___ ___ ___ ___	
	___ ___ ___ - ___ ___ - ___ ___ ___ ___	
	___ ___ ___ - ___ ___ - ___ ___ ___ ___	
	___ ___ ___ - ___ ___ - ___ ___ ___ ___	

From the IRS' website *(https://www.irs.gov/coronavirus/non-filers-enter-payment-info-here)***:** At conclusion of filing, "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."