



EIP Volunteer Subject Matter Training

PARTNERS

LADDER UP



Overview of the EIP Program



For many Illinois residents, the recently authorized Economic Impact Payments (EIP), otherwise known as the stimulus payments, are critical for meeting basic needs



However, many individuals continue to face challenges accessing those payments



Ladder Up is part of a coalition focused on increasing access to the EIP among low-income, unbanked, and vulnerable populations, and we thank you for volunteering to help deliver critical information to these populations

Purpose of the EIP helpline

- ▶ The coalition launched the [GetMyPaymentIL.org](https://www.getmypaymentil.org) website to provide information and resources about the EIP
- ▶ However, some clients may still have questions after accessing the website
- ▶ Additionally, some individuals don't have internet access or the ability to navigate the website
- ▶ An email and telephone helpline provides another way for clients to access EIP resources



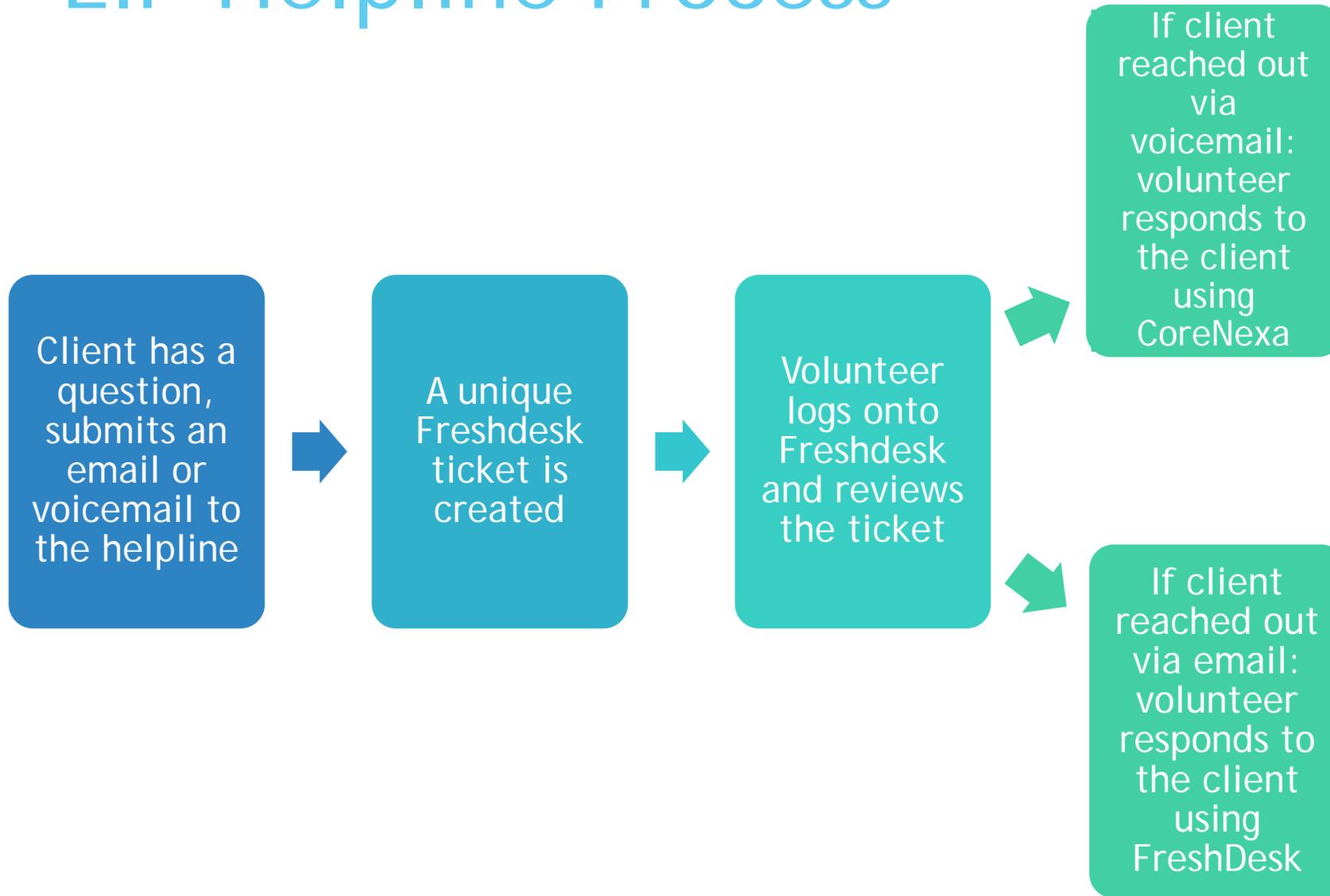
Your Role as a Volunteer

It is important to note that this is not a live helpline. Clients can send in inquiries via email or call the helpline number to leave a voicemail.

- ▶ As a volunteer, you can expect to
 - ▶ Respond to client emails and/or voicemails
 - ▶ Answer basic questions about EIP eligibility and accessing EIP payments
 - ▶ Serve as a reassuring and helpful presence to clients during this distressing time
- ▶ More detail follows in the remaining slides



EIP Helpline Process



Freshdesk and CoreNexa will be explained further in the EIP Volunteer Technology Training

How to Become an EIP Volunteer



Read this [EIP Subject Matter Training](#), the [EIP Technology Training](#), and review the additional [EIP Volunteer Resources](#)



Take and pass a short, 8-question certification test and successfully process two Freshdesk tickets



Download the CoreNexa app on your smartphone to be able to return calls to clients (instructions in technology training)



Activate your Freshdesk account and familiarize yourself with using Freshdesk (instructions in technology training)



Feel free to log in to Freshdesk and respond to inquiries whenever fits your schedule! Report your hours volunteered on [VolunteerHub](#) (instructions in technology training)

Common Types of Questions to Expect

- ▶ The types of questions we expect that volunteers will field include those about:
 - ▶ The basics of the EIP (i.e. eligibility, how to use recently-developed IRS webpages to check payment status and provide payment information to the IRS) ([see slides 8-23](#))
 - ▶ What safe, affordable bank accounts can be opened online at this time (i.e. referring people to accounts certified by the Bank On program) ([see slide 27-32](#))
 - ▶ Questions that involve tax law (to the extent covered by Ladder Up's training within the IRS Volunteer Income Tax Assistance (VITA) scope) will be passed on to experienced tax volunteers ([see slides 24-26](#))
 - ▶ You do not need to have deep tax knowledge to answer EIP helpline inquiries but having tax knowledge can be enormously helpful

Helpful Tips



Open the [EIP Volunteer Page](#) to access training materials to reference during your shift. You can always access this EIP Volunteer Page on the "Volunteer Corner" menu of the Ladder Up website



If you're responding to client emails, feel free to log on to Freshdesk whenever works with your schedule. If you're returning client voicemails, we ask that you only call clients between the hours of 9 am and 8 pm



Remember to self-report your hours on VolunteerHub each day. More information on how to do this is in the Technology Training



Check for any updates related to new EIP information or process improvements on the [EIP Volunteer Page](#)

Basics of EIP

- ▶ Economic Impact Payments - commonly referred to as “stimulus checks” or “stimulus payments” - are a key provision of the Coronavirus Aid, Relief, and Economic Security (CARES) Act legislation that Congress passed to help reduce the financial burden on residents across the United States
- ▶ In general, people filing as single or head of household will get \$1,200, married filing jointly couples will get \$2,400, and anyone who claimed dependents under age 17 gets an extra \$500 per dependent
 - ▶ There are income limits that reduce the EIP amount, see [this FAQ](#) for thresholds
- ▶ The payments are an advance of a temporary credit for tax year 2020
 - ▶ Payments are currently being issued based on information from 2018 or 2019 taxes. The IRS will use whichever is the most recent year completed.
- ▶ The EIP is not included in taxable income and does not need to be paid back
- ▶ Receiving the EIP this year will not affect the amount of someone’s tax refund next year. They will still get a refund if they are eligible
- ▶ The EIP website developed for this project is: www.getmypaymentil.org

Common Questions about the EIP

Q:

Who is eligible to receive the Economic Impact Payment?

A:

U.S. citizens or resident aliens who:

Have a valid Social Security Number,

Cannot be claimed as a dependent of another taxpayer, and

Have an adjusted gross income (more information on AGI on [this slide](#)) under:

- \$75,000 for individuals
- \$112,500 for individuals who file taxes as head of household
- \$150,000 for married couples filing joint tax returns.

Taxpayers will receive a reduced payment if their adjusted gross income is between:

- \$75,000 and \$99,000 if their filing status was single or married filing separately
- \$112,500 and \$136,500 for individuals who filed as head of household
- \$150,000 and \$198,000 for married couples who filed jointly

The amount of the reduced payment will be based upon the taxpayer's specific adjusted gross income.

Those who do not make enough money to file a tax return are also eligible.

This includes people receiving Social Security retirement, disability (SSDI), survivors benefits, Supplemental Security Income (SSI), veterans benefits, or Railroad Retirement benefits.

If anyone on a return has an ITIN, the EIP cannot be claimed (not even by those with valid SSNs)

Common Questions about the EIP

Q:

How much do I get for my EIP payment?

A:

- Single individuals (including those who file Head of Household) who meet the eligibility requirements will receive \$1,200
- Married couples with no dependents who meet the eligibility requirements will receive \$2,400
- Individuals or married couples who claimed dependents on their 2019 tax return (or 2018 if they haven't filed 2019 yet) will receive an additional \$500 for each dependent claimed on their taxes who is under age 17

Common Questions about the EIP

Q:

When will I get my payment?

A:

We cannot provide an estimate on that. Remind callers to track their payment status on the IRS website, though the IRS only updates [Get My Payment](#) once a day so they should only check once per day.

The IRS started making payments the week of April 13th. The government is trying to get payments out as quickly as possible. People with bank account information already on file with the IRS will receive their payments fastest. Paper checks, however, may take up to five months. If you have not filed taxes for 2019 yet, the deadline has been extended until July 15th. However, stimulus payments will be available until the end of the year for most people if they act by 10/15/20. Also, if you do not owe the IRS or the State of Illinois any taxes, you can file after the July 15 deadline without a penalty.

Common Questions about the EIP

Q:

How will I get my payment?

A:

The IRS will use information from your 2019 tax return (or 2018 if you have not filed yet) to calculate your payment amount. Payments will be deposited directly into the same bank account used for your tax return. The IRS will mail a paper check to tax filers who did not provide a bank account number when they filed taxes and who did not provide banking information through the [IRS Get My Payment Portal](#) by 5/13/20.

People receiving Social Security (retirement, survivors, and disability), veterans benefits, Supplemental Security Income (SSI), or Railroad Retirement benefits are not required to file a tax return to receive payment. These individuals will receive the EIP in the same way they receive their benefits.

Common Questions about the EIP

Q:

I haven't gotten my payment yet, do I need to do anything?

A:

It depends. This is a great time to use the [decision tree](#). If the client has filed their 2019 or 2018 taxes already and they meet the EIP eligibility requirements, no action is needed. If they haven't filed in 2019 or 2018 and have an obligation to do so, they need to file first to receive the EIP. If they don't have an obligation to file, they should generally fill out the [IRS Non-Filer Portal](#). See [slide 19](#) related to non-filers. If they only receive Social Security, they do not need to fill out the IRS Non-Filer Portal; they will receive the EIP in the same method they receive their Social Security payments. In most situations, the client can check their EIP status on the [IRS Get My Payment Portal](#).

Common Questions about the EIP

Q:

What information do I need to use the non-filer website?

Full name, Current mailing address, Email address, Date of birth, Valid Social Security number, Bank account number, routing number, and type of account (checking or savings) Otherwise you'll receive a paper check in the mail.

A:

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 dependent child you support who is under 17:

Name, Social Security number or Adoption Taxpayer Identification Number, Relationship to you or your spouse

Q:

What if I don't have any income?

A:

You are still eligible for a payment. If you have not filed taxes for 2018 or 2019, you need to register on the IRS non-filer portal to receive your payment.

Common Questions about the EIP

Q:

What is adjusted gross income (AGI)?

A:

Adjusted gross income is a number found on your tax return (Line 8b on the 2019 Form 1040, line 7 on 2018 Form 1040). It is the money you receive (wages, child support, interest, etc.) minus some specific costs, like student loan interest or alimony.

Q:

Do people who owed taxes in 2018 or 2019 need to provide their bank account information?

A:

Yes. While the IRS retains information used to deposit money into accounts, it is not authorized to use payment information provided to withdraw money from accounts. If someone owed taxes and paid them electronically (or by check), the IRS does not have bank account information to use for direct deposit. After 5/13, there is no way to add in banking information if a paper check is already scheduled to be mailed.

Common Questions about the EIP

Q:

Can non-filers without access to the internet file a paper form to get their Economic Impact Payments?

A:

Due to COVID-19, the IRS is not processing paper forms. Sending forms through the mail will delay the delivery of the payment. Advocates are encouraged to help connect people without internet access to assistance to file the form. This also means that amendments cannot be processed at this time, since they must always be filed on paper.

Q:

Where can someone get help filing a tax return to get their Economic Impact Payment?

A:

Clients who meet eligibility requirements can file their taxes online, for free through the [IRS Free File program](#). Ladder Up is currently working to expand its Virtual VITA program, which will allow for clients to have their tax returns prepared remotely by IRS-certified volunteers. Interested clients should sign up for the Ladder Up client newsletter to receive updates. ([English](#) / [Spanish](#))

Common Questions about the EIP

Q:

What if someone in my family has an ITIN?

A:

Unfortunately, individuals who do not have valid Social Security Numbers are not eligible. If anyone on your tax return has an Individual Taxpayer Identification Number (ITIN), then you are not eligible for an Economic Impact Payment even if you, your spouse, or anyone else on the return have valid SSNs

Q:

I was claimed as a dependent. Am I eligible?

A:

No, If someone is claimed as a dependent on a tax return, that person is ineligible to receive a payment for themselves.

Q:

Are college students eligible for payments?

A:

College students who are not considered dependents are eligible. Generally, college students who are under 24, attend full-time, and receive significant financial support from their parents are considered dependents. These students are not eligible.

Common Questions about the EIP

Q:

What if I pay child support? Will I receive a payment?

A:

You can still receive a payment. However, child support debt will be taken out of your payment.

Q:

I am currently or was recently incarcerated. Am I eligible?

A:

If you are currently incarcerated, the IRS says you are not eligible for a payment.

Q:

Where will my payment go if my refund was direct deposited on a CFR card last year?

A:

A CFR card is a free reloadable debit card that some taxpayers use to have their tax refunds directly deposited to in order to receive them quickly. The EIP will be deposited on the CFR card if it is still active. If the client has a question about their CFR card status, forward their ticket to the Ladder Up Financial Capability Team at debitcard@goladderup.org.

Common Questions about the EIP

Q:

Will this impact my public benefits like food stamps or TANF?

A:

No. As with any tax refund, these payments will not count against your eligibility for receiving public benefits. The payment also will not affect your benefit amounts.

Q:

I received a message from the IRS asking for my personal information. Is this a scam?

A:

Yes, this is a scam. The IRS will never ask for your personal information or bank account. With the rollout of the stimulus payments, there's an increased risk of scams. It's important to stay vigilant and to not respond to unsolicited communications asking for your personal or private information - through mail, email, phone call, text, social media or websites.

Additional Information Related to Non-Filers

- ▶ Some individuals have no legal requirement to file taxes if their income is below a certain threshold and they have no other requirement to file
 - ▶ These individuals are still eligible for the EIP
- ▶ To claim the EIP, they can input their information into the [IRS Non-Filer Portal](#) (more detail about what information they need to provide is in [on this slide](#))
- ▶ **Please note: You cannot enter information into the IRS Non-Filer Portal or the IRS Get My Payment Portal for any clients**
 - ▶ If a client is having difficulty completing these forms on their own, you can ask them if they have a trusted friend or family member who could assist them

Additional Information Related to Non-Filers

- ▶ Non-filers do not have to file a full 2019 tax return to get the EIP, however, in some cases it is advantageous for them to file a full return in order to get their withholdings back and/or claim credits such as the Earned Income Tax Credit (EITC)
 - ▶ If a caller has a question about if they should file, reassign their ticket to the Tax Expert group so that an experienced tax volunteer can help them with this determination
- ▶ Individuals should only use the non-filer portal if they do not plan to and do not have an obligation to file a 2019 tax return
- ▶ If a client only receive Social Security, SSI, or veterans benefits, they are not required to file and do not need to fill out the IRS Non-Filer Portal; they will receive the EIP in the same method they receive their benefits.

Who should use the non-filer portal?

- Those who have no filing requirement and do not intend to file a 2019 tax return
- SS, RR, SSI, and VA benefit recipients who only started receiving benefits on or after January 1st, 2020 (and do not otherwise have a filing requirement)

Who should NOT use the non-filer portal?

- Anyone who is required or intends to file a 2019 tax return
- Those who receive SS, RR, SSI, or VA benefits that started prior to January 1st, 2020

Who should use the Get My Payment app?

- Anyone attempting to check the status of their payment

Tax Questions on the EIP Helpline

- ▶ In order to protect clients, we ask that EIP volunteers NOT provide tax advice. We realize that many of you have been long-time tax volunteers but speaking to clients over the phone or through email poses different challenges than working with them at a tax site.
- ▶ It can be difficult to ensure you have all the information necessary to make an informed recommendation without being able to physically see a client's tax documents. We do not want to put any clients at risk of facing controversy with the IRS due to an answer we provided based on incomplete information.
- ▶ If a client's email or voicemail indicates that they have a tax question, assign the ticket to the Tax Expert group (the process for assigning tickets will be discussed in the EIP Volunteer Technology Training).
- ▶ This will direct the ticket to a group of experienced tax volunteers who will respond to the client and, if necessary, work to securely and remotely view the client's tax documents in order to provide recommendations.

Examples of Tax Questions

Many of our clients reach out with tax-related questions, and it can be difficult to determine exactly when a question crosses from being a general tax question to providing tax advice. We know that this is a gray area, but we have provided some guidelines to help you determine when to re-assign a ticket to the Tax Expert group.

In general, if someone is asking something that *would directly impact what appears on their personal tax return* that is a tax question that needs to be passed to the tax expert group.

- ▶ Examples of questions that you should not answer as an EIP helpline volunteer, and should instead direct to the tax volunteers by assigning the ticket to the Tax Expert group:
 - ▶ What filing status should I use?
 - ▶ I'm not required to file taxes, but should I?
 - ▶ Can you tell me where to enter ____ on Turbo Tax (or another filing site)?
 - ▶ Can I claim ____ as a dependent?

Examples of Tax Questions

If a question does not include information specific to a client's personal tax return (i.e. the answer wouldn't change from person to person) AND you can say you confidently know the answer, then the client's question may not need to be escalated to a tax expert.

Examples of questions you may be able to answer as an EIP helpline Volunteer:

- ▶ *Do I need to report gambling winnings/cash income/unemployment?* Generally, all sources of income always need to be reported. As an EIP helpline volunteer, you won't be able to provide specifics about how to do this or how it will impact their tax return, but you can let a caller know that all income needs to be reported.
 - ▶ An exception would be SSI, which is not taxable
- ▶ *Do you know whether I'll get a refund or owe?* If a client asks this question, inform them that we cannot ever answer this question until their tax return has been completed.

When in doubt, reassign the ticket to the Tax Expert group. Ladder Up hopes to have its Virtual VITA program up and running soon. If people need to file, you can direct them to [this page](#) of the Ladder Up website for resources on where to file and updates on Virtual VITA.

Banking Options

- ▶ People who don't have a bank account might want to consider opening a Bank On-certified bank account - there are currently 5 products that have 1) a Chicago presence and 2) can be opened online*:
 - ▶ [Bank of America, Advantage SafeBalance Banking Account](#)
 - ▶ [Chase, Secure Banking Account](#)
 - ▶ [Citi, Access Account](#)
 - ▶ [U.S. Bank, Safe Debit Account](#)
 - ▶ [Wells Fargo, EasyPay Card](#)

*An account from [Self-Help Credit Union](#) can be opened by mail if internet access is an issue, but will take longer to open



Bank On Account Requirements

Chase

- No minimum opening deposit needed

US Bank

- Complete the application and get an opening deposit number. The account isn't fully active until you meet the deposit

Citi

- No minimum opening deposit needed

Bank of America

- Complete the application and get an opening deposit number. The account isn't fully active until you meet the deposit

Wells Fargo

- Does not allow an application to be completed without an opening deposit

The Bank On Accounts explained on the previous slide have different requirements and minimums

We are not allowed to publish these on the EIP website, but if a client asks, you can share this information with them

Remember: You CANNOT advise a client on which bank to choose

Bank accounts have advantages beyond EIP

If the client has never had a bank account, they may not see the value of getting one since they can no longer submit bank information to have their EIP directly deposited



BUT, there are many other long-term advantages to getting a bank account and debit card that you can share with them:

Can deposit their stimulus check when it arrives

Can get their tax refund quicker by having it direct deposited

Can use a debit card to shop at online retailers

Can use apps like GrubHub, UberEats, Venmo, etc

Can get their paycheck or government benefits direct deposited

Their money will be safer, more secure than keeping it at home

More Banking Talking Points

Accounts available through the Bank On program are safe and affordable with NO surprise fees

Bank On accounts have low minimums, no overdraft fees, low fees, etc.

Banking can give you better access to your money and allow you to make payments online at home - keeping you safe during the COVID-19 health crisis

Here are the links to the Chicago Bank On websites:
<http://bankonchicago.com/>
<https://covidbanking.joinbankon.org/>

that you can direct clients to for more information

How to refer a client to safe banking options

- 1 Inform the client that they have the option of opening an online banking account in order to expedite the processing of their EIP
- 2 Let the client know that Bank On has identified several bank accounts that are safe and affordable
- 3 Tell the client about the 5 banking options listed on [slide 23](#)
- 4 You are NOT to recommend a certain bank, instead encourage them to research which one is the best fit for them
- 5 Inform them that they can find the links to apply on the [EIP Website](#)

Referring Caller to Ladder Up's Financial Capability Team

- ▶ If a caller wants to access direct deposit but cannot or does not want to open a bank account (i.e. because of a ChexSystem problem or lack of government-issued ID), Ladder Up's Financial Capability Team can assist them with opening a CFR card
 - ▶ A CFR card is a free debit card through US Bank
 - ▶ Tax refunds can be directly deposited onto a CFR card, if a client will be filing taxes
- ▶ This team can also provide the following services if the caller is interested:
 - ▶ Helping set up an individual/household budget
 - ▶ Pulling and analyzing credit scores and reports
 - ▶ Personalized financial coaching and group financial coaching
- ▶ If you have a client that needs any of these services, please forward their ticket to debitcard@goladderup.org (how to forward tickets will be addressed in the EIP Technology Training)

Decision Tree

- ▶ In order to assist volunteers with determining best next steps for clients, we've created an EIP Decision Tree
 - ▶ This decision tree is a helpful tool for determining client EIP eligibility and whether any additional steps need to be taken to receive EIP

[Click here for an interactive decision tree](#)
[\(Available on the EIP website\)](#)

[Click here to view the full decision tree](#)
[\(Available on the EIP Volunteer Resources Website\)](#)

Tips for Working with Clients

- ▶ This is an especially stressful time, and while most clients will be grateful for your assistance, there is a chance you may interact with a client who is upset.
 - ▶ If this happens, keep in mind that they are likely not upset with *you*, but are upset with the situation and that they are having difficulty accessing their payments.
- ▶ As a volunteer on the helpline, you have the opportunity to serve as a reassuring and helpful presence in this very distressing situation.

Remember: You and the client have the same goal. You both want the client to access their EIP benefits quickly!

Be Friendly and Courteous

- ▶ Clients are reaching out to the helpline because they have a problem and they're hoping someone can help them resolve it.
- ▶ Human connection might not always resolve every problem, but it *can* make us feel better, especially in distressing times.
 - ▶ Feel free to ask clients how they're doing, let them know you'll be crossing your fingers they get their payment soon, or make brief small talk if you're returning a call!
- ▶ Use a warm tone and let clients know you're happy to help.
- ▶ When responding to emails, be sure to personalize the signature with your first name.

Use Active Listening and Ask Follow-Up Questions

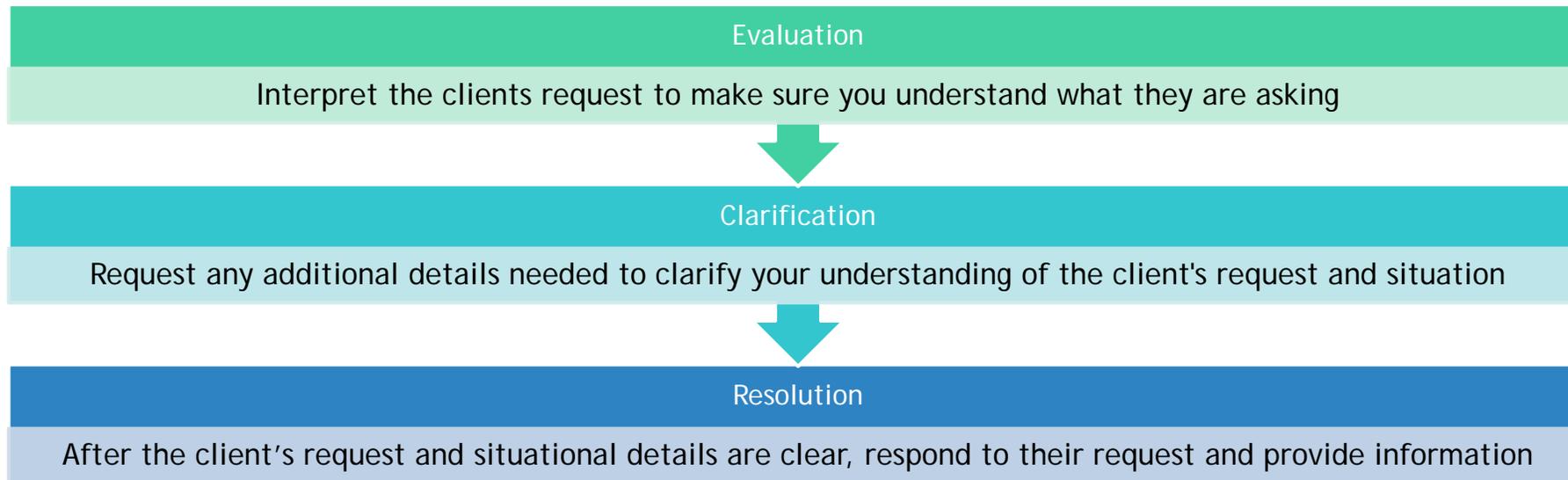
- ▶ In person, it's easy to tell when someone is actively listening-they're making eye contact and nodding. Over the phone or through email, we lose those non-verbal cues.
 - ▶ Reflecting back what a client has said can show them you're listening while also making sure you understand their situation and giving them the opportunity to correct any misunderstandings
- ▶ Keep in mind that many of our clients don't have a tax background and may not be familiar with some of the tax jargon found on the IRS website.
 - ▶ Much like you would at a tax site, you will likely need to ask follow-up questions to ensure you understand their situation completely
 - ▶ Be sure to explain things in a way that is accessible and provides clients with clear, tangible steps they can take
 - ▶ We recommend using the term "stimulus check" or "stimulus payment" when talking to clients, as many of our clients may not be familiar with the term "Economic Impact Payments"
 - ▶ Provide direct links to IRS webpages, when possible, so that clients know exactly where to look for information
- ▶ Be prepared that clients sometimes think that they are talking to the IRS when they contact us. You may need to clarify for them what limitations we have on assisting them.

Stay Calm (Even if They Aren't)

- ▶ When talking to someone who is upset or angry, we often have a natural tendency to match their level of distress through our tone, speech, and actions.
 - ▶ However, escalating our own emotional response will ultimately only cause an upset client to escalate their actions even more.
- ▶ Staying calm, even if a client isn't, will help reassure them that you are here to help, and ultimately is more effective in calming them so that you can both work on solving the problem at hand.
 - ▶ Avoid telling them to calm down, blaming, or telling them they shouldn't be upset
 - ▶ Be mindful of keeping your own tone and the volume of your speech at a calm level
 - ▶ Reassure them that you want to work with them to resolve the problem
 - ▶ Validate their emotions. Remember: this is a stressful time and they're having difficulty accessing payments they need. Their distress makes sense even if it makes us feel uncomfortable

Resolving Client Questions

- ▶ You will find that most inquiries are not clear and simple enough to be resolved with only a single response. You will likely need to clarify client inquiries and ask for additional information before you can provide a client with a definitive answer.
- ▶ We recommend using the following steps when responding to client inquiries:



Sample Scripts for Calling Clients

- ▶ Greeting to use when calling a client
 - ▶ “Hi, this is [first name] calling you back from the stimulus payment hotline. You called us [this week/today/yesterday] with a question about [fill in the blank] and I want to get back to you on that question.”
 - ▶ Provide the client with an answer to their question or ask any necessary follow-up questions
- ▶ If you are on the phone with a client and they ask a question you cannot answer in that moment
 - ▶ “I will look into your question and call you back once I have more information. When are some good times for someone to call you back?”
 - ▶ In Freshdesk, leave a note with detailed information about your phone call and the remaining questions. Assign the ticket to the “Escalations Group” (instructions in the EIP Volunteer Technology Training)
- ▶ Leaving a voicemail for a client
 - ▶ “Hi, this is [first name] calling you back from the stimulus payment hotline. We received your voicemail [this week/today/yesterday] and I want to get back to you on your question.”
 - ▶ If possible via voicemail, provide the client with an answer to their question or let them know about any follow-up information needed to assist them
 - ▶ “If you have any additional questions, please feel free to call the stimulus hotline at 888-553-9777 or send an email to help@getmypaymentIL.org. If you call the hotline back, please let us know the best day and time that we can reach you, so that we can speak with you directly”

Where to refer if you can't help?

- ▶ Ladder Up has started a blog (<https://www.goladderup.org/blog/>) with a variety of resources related to COVID-19 including:
 - ▶ Childcare
 - ▶ Financial Literacy
 - ▶ Food Resources
 - ▶ General COVID-19 Updates
 - ▶ Monetary Assistance
 - ▶ Resources by Community
 - ▶ Student Loans
 - ▶ Tax Information
 - ▶ Unemployment Information

Keep getting the same question that you don't know how to answer?
Let us know and we will research and provide additional guidance!

Additional EIP Resources

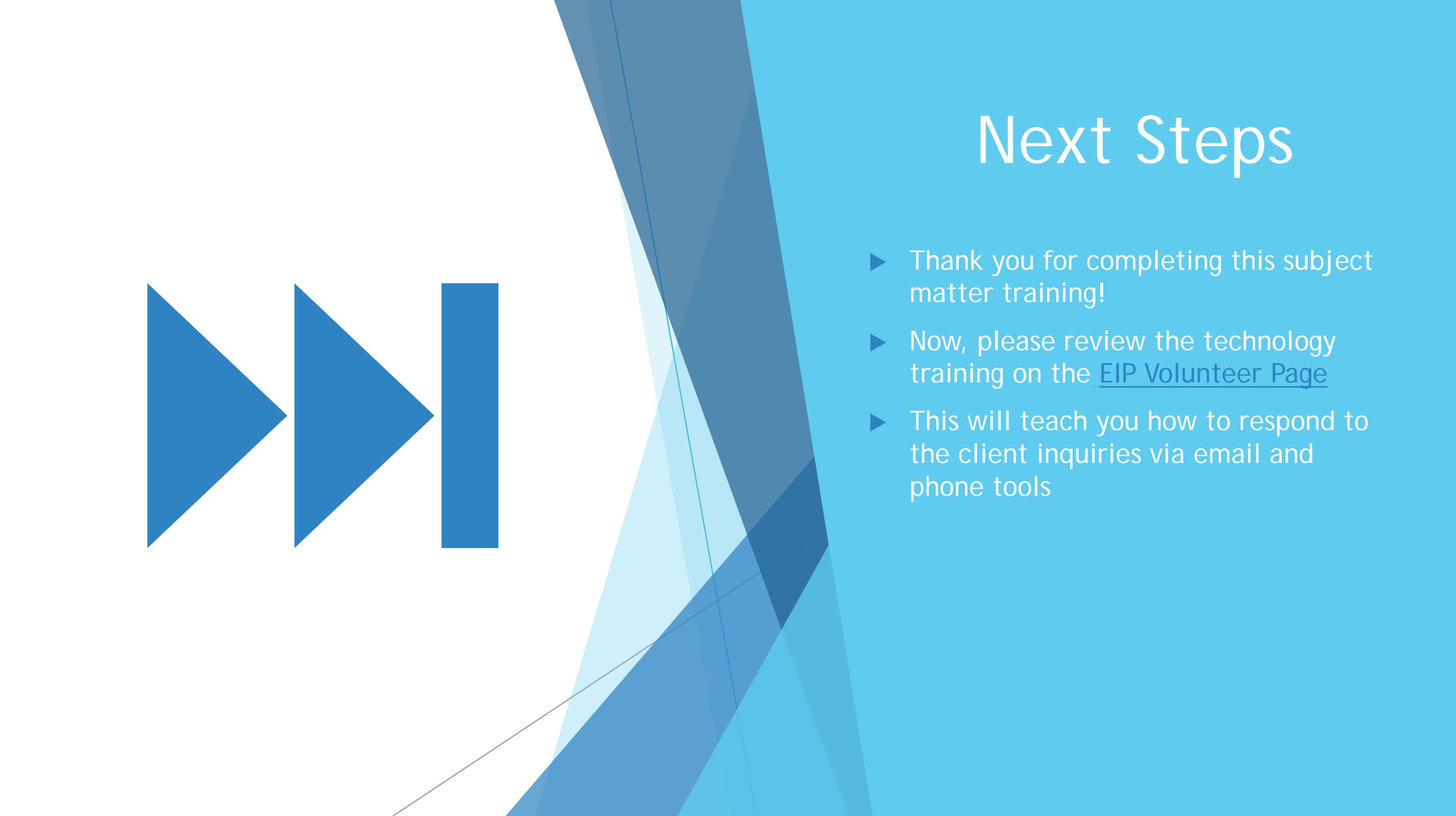
- ▶ [IRS Website with Get My Payment and Non-Filer Portals](#)
- ▶ [A Guide to Economic Impact Payments for Advocates](#)
- ▶ [Information about EIPs for Non-Filers](#)
- ▶ [Calculator to determine EIP amount](#)



Questions?

Ladder Up staff are here to support you!

- ▶ If you have an urgent technology request such as difficult accessing Freshdesk or using the CoreNexa app, reach out to Jennifer during regular business hours (M-F, 9 am-5 pm)
 - ▶ Jennifer: 312-466-0771 ext. 127
- ▶ For non-urgent requests email eipsupport@goladderup.org
 - ▶ Let us know if you have suggestions for additional canned email responses, FAQs, or other resources!
- ▶ Having difficulty resolving a client question? Assign the ticket to the Escalations Group (instructions provided in the EIP Volunteer Technology Training) and Ladder Up staff will take a look at it.



Next Steps

- ▶ Thank you for completing this subject matter training!
- ▶ Now, please review the technology training on the [EIP Volunteer Page](#)
- ▶ This will teach you how to respond to the client inquiries via email and phone tools