EIP Tips - Updated 7/16/2020

1. **You can use the IRS Where's My Refund tool to track the status of a non-filer return.** (This is helpful if client can't access the non-filer account they created and/or if they paper filed. I've had a lot of people say they "think" they did a non filer return but aren't sure if it worked and they don't have login info.). In the Where's My Refund tool, you need SSN, filing status and refund amount. Put **$1 for the refund amount** instead of zero. Tell clients to use the Where's my Refund tool to track 2019, then once that's done to use Get My Payment to track the EIP (or enter direct deposit info if they can). (We have added this as a canned response in Freshdesk.)
2. **In addition to asking if social security recipient (or any type of federal benefit recipient) was claimed as a dependent, also ask about filing status of the spouse.** Example scenario: Client is SS recipient whose spouse filed a MFS return in 2018/2019. Client does not file and does not get auto EIP payment even though all other requirements are met. This might be due to his SSN being listed on spouse's MFS return, which creates a filing requirement for him also (because SS might be taxable in that scenario).

3. We have heard from many social security, SSI, and SSDI recipients that they still have not received their payments. The only guidance we have for now is to wait. Unless the client's filing status has changed, as mentioned above, there is not much we can do besides advise these clients to check Get My Payment for updates. If the client started receiving federal benefits in 2020, they may need to file a tax return or fill out the non-filer site in order to receive their payment. This table a helpful resource: https://www.ssa.gov/coronavirus/assets/materials/economic-impact-payments-for-social-security-and-ssi-recipients.pdf, as well as this site: https://www.ssa.gov/coronavirus/.

4. Refer clients to the IRS phone number at 800-829-1040 to speak with an IRS representative. There is limited staffing, and clients will need to wait for assistance, but per our IRS contact's advice, he thinks this number is the best option for clients (instead of the EIP specific number).

Source: Silya Shaw, Legal Aid of Western Missouri LITC