

# TAX FILING 101:

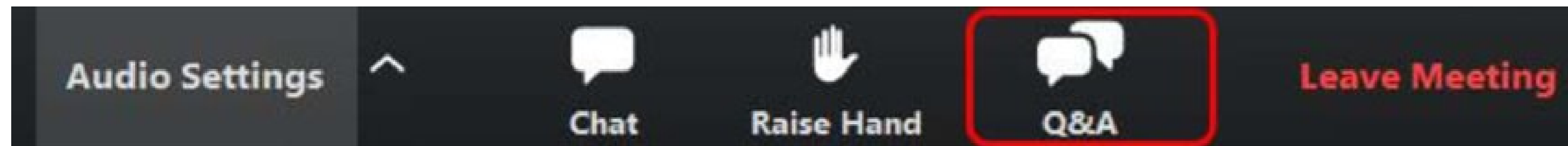
EXPANDED FEDERAL AND STATE TAX CREDITS  
PUT MONEY IN THE POCKETS OF TRANSITION-AGE YOUTH



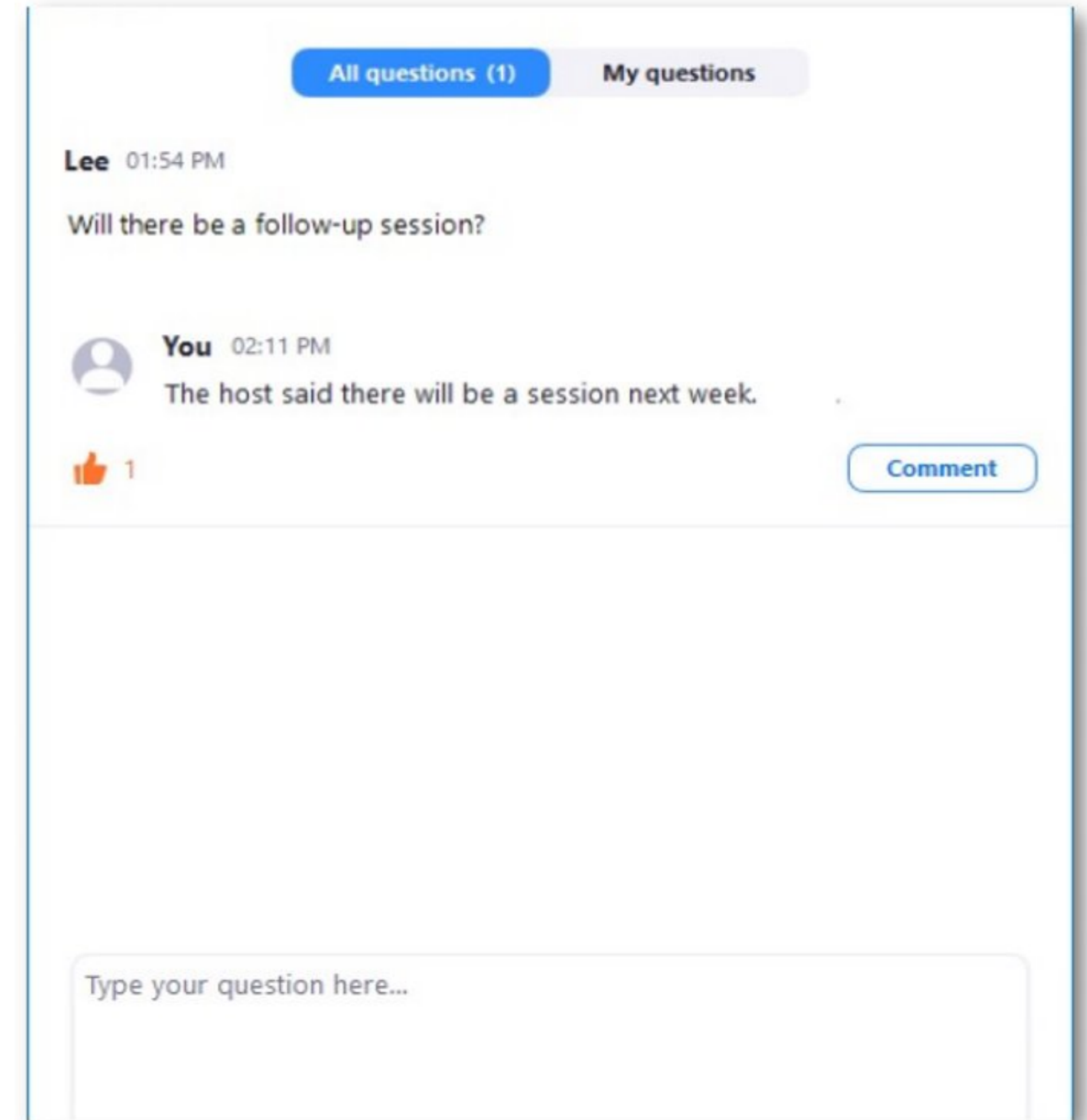
February 1, 2022 • 10:00-11:30 a.m.

# USING ZOOM WEBINAR

To submit questions, click on the Q & A icon on the control panel. The Q & A window will appear, allowing you to ask questions to the host and panelists.



Webinar materials and recording will be posted at [www.jbay.org](http://www.jbay.org) in the resource library and sent out to all registrants following the live presentation.



# TODAY'S AGENDA

- 1 Introduction
- 2 Benefits of Tax Filing for TAY
- 3 Background on Tax Filing and Credits
- 4 Ways to Help TAY Get Their Refund
- 5 Tax Literacy and Tax Fraud
- 6 Upcoming Events
- 7 Question and Answer Session

## **MEET THE** **Panelists**

### **Alexis Barries & Chris Torrez**

Youth Advocates – John Burton Advocates for Youth

### **Andrew LePage**

CA Franchise Tax Board

### **Anna Johnson**

John Burton Advocates for Youth

### **Cindy Guillen**

Santa Clara County Social Services Agency

### **Elizabeth Wells**

Law Foundation of Silicon Valley



# WE NEED YOU TO SUPPORT CALIFORNIA'S 3.8 MILLION TAY

- College Students
- Foster Youth
- Young Parents
- Homeless Youth

# COVID-19 IMPACT ON TAX EARNINGS

- Job loss and reduced hours
- Internet and technology expenses
- Grocery and PPE expenses
- Housing needs
- Difficulties accessing childcare
- Difficulties accessing public benefits and unemployment
- Increased utilities and home costs
- Stimulus check barriers



# FEDERAL EARNED INCOME TAX CREDIT WHAT'S NEW?

- For the 2021 tax year, eligibility threshold lowered to
  - 18 years old for foster and homeless youth
  - 19 years old for all transition age youth
- Amount of the credit is up to
  - \$1,502 for individuals
  - \$6,728 for parents



**The EITC is for working people who earn less than \$57,414. This year, the amount of the credit you could receive is up to \$6,728 if you claim qualifying children or up to \$1,502 if you don't claim qualifying children. The amount of the credit depends on:**

- whether you are single or married
- if you have no children or the number of qualifying children you have
- the amount you earned

**Just imagine what you could do with the EITC.**



Life's a little easier with



**See if you qualify.**  
[www.irs.gov/eitc](http://www.irs.gov/eitc)

Publication 962 (Rev. 12-2021) Catalog Number 13772B Department of the Treasury Internal Revenue Service www.irs.gov

**Are you eligible to claim the EITC for 2021?**

**Here are the rules to claim the credit . . .**

- Generally must be a U.S. citizen or resident alien all year
- Must work and have earned income
- Must have a valid Social Security number issued on or before the due date of the return (including extensions)
- May not have more than \$10,000 of investment income (such as interest)
- Married but separated taxpayers who don't file a joint return may qualify to claim the EITC if they have a qualifying child and if they meet certain other requirements.
- May not be a qualifying child of another person
- May not file Form 2555 (related to foreign earned income)

You have to file a federal income tax return to get the EITC even if you owe no tax or are not required to file. The EITC provides a boost to help pay your bills or save for a rainy day.

**Did you meet the rules?**

**If so, your earned income must be less than . . .**

- \$21,430 (\$27,380 if married filing a joint return) with no qualifying children who have valid SSNs
- \$42,158 (\$48,108 if married filing a joint return) with one qualifying child who has a valid SSN
- \$47,915 (\$53,865 if married filing a joint return) with two qualifying children who have valid SSNs
- \$51,464 (\$57,414 if married filing a joint return) with three or more qualifying children who have valid SSNs

Special rules may apply for members of the U.S. Armed Forces in combat zones, members of the clergy, and those with disability retirement income.

**Do you have a qualifying child who lives with you?**

**To be a qualifying child for the credit . . .**

- The child must meet the relationship, age, residency, and joint return tests described at [www.irs.gov/eitc](http://www.irs.gov/eitc) or in Publication 596, Earned Income Credit.

**Did you double check your facts?**

**Here are common errors to avoid . . .**

- Claiming a child as a qualifying child who does not meet the relationship, age or residency tests
- Underreporting or overreporting income or expenses
- Social Security number and last name mismatches

If you claim the EITC, the IRS can't release your refund until mid-February. Errors on the tax return can cause a delay in processing your claim for the tax credits.

**Do you want help with the EITC?**

**Go online or call us toll free . . .**

- Go to [www.irs.gov/eitc](http://www.irs.gov/eitc) for free information and to check out the interactive EITC Assistant to see if you qualify for the credit and estimate the amount of your EITC.
- Visit a Volunteer Income Tax Assistance (VITA) site for free tax help and preparation. Go to [www.irs.gov/VITA](http://www.irs.gov/VITA) or call 1-800-906-9887 to find a site.
- Use Free File at [www.irs.gov/FreeFile](http://www.irs.gov/FreeFile) for free online filing through commercially available tax preparation software.
- Go to [www.irs.gov/choosetaxpro](http://www.irs.gov/choosetaxpro) to help locate a qualified tax return preparer.
- Call 1-800-829-4059 if you have access to TTY/TDD equipment for the hearing impaired.

# ADVANCED CHILD TAX CREDIT

## WHAT'S NEW?

- **For the 2021 tax year,**
  - The amount of the Child Tax Credit was increased
  - Parents may have received advanced monthly checks, worth part of the value of the full credit
  - To claim the full amount, they must file their taxes
  - **Reminder** – parenting TAY are eligible whether or not they have earned income in 2021
- **Amount (up to)**
  - **\$3,600** per child ages 5 and under in 2021
  - **\$3,000** per child ages 6-17 in 2021





# CALIFORNIA EARNED INCOME TAX CREDIT

## WHAT'S NEW?

- **Before 2018**, without a qualifying child, had to be ages 25-65
- Beginning in **tax year 2018**, eligibility lowered to 18 years old
- Beginning in **tax year 2019**, the Young Child Tax Credit gives \$1,000 to qualifying parents with a child younger than age 6
- Beginning in **tax year 2020**, tax filers who use an Individual Taxpayer Identification Number (ITIN) qualify



When we help TAY the results are impressive!

# PILOT RESULTS

- **45 youth** filed through a VITA site specifically equipped to assist current and former foster youth
- Over **\$135,000** received in state and federal tax refunds
- Parents filing received a **42% increase** in annual earnings
- Single filers received a **14% increase** in annual earnings



## LEARN MORE ABOUT THE PILOT

# MONEY IN THE POCKET DURING THE PANDEMIC:

Results from Santa Clara County Pilot to Increase  
Receipt of Tax Credits Among Transition-Age Foster Youth

[www.jbay.org/resources/money-in-the-pocket/](http://www.jbay.org/resources/money-in-the-pocket/)



## MONEY IN THE POCKET DURING THE PANDEMIC:

RESULTS FROM A SANTA CLARA COUNTY PILOT TO INCREASE RECEIPT  
OF TAX CREDITS AMONG TRANSITION-AGE FOSTER YOUTH



AUGUST 2021

# FOSTER YOUTH TAX PROJECT

## EXPANDED FOR 2022

JBAY is partnering with 6 counties to establish a Volunteer Income Tax Assistance Site.

- Alameda, Contra Costa, and San Francisco with First Place for Youth
- Fresno with Focus Forward and Fresno Barrios Unidos
- Los Angeles with the Coalition for Responsible Community Development and The Community College Foundation
- Santa Clara with Bill Wilson Center at the Hub

Counties and partner organizations are establishing dedicated VITA sites for current and former foster youth and directing youth to a free tax filing appointment.

The project is supported by funding from Golden State Opportunity, Pritzker Foster Care Initiative, Tipping Point Community Foundation, Walter S. Johnson Foundation, United Way Bay Area, and United Way of Fresno and Madera.



- Tell us about your free tax appointment with the Dream Center's VITA site in Bakersfield, CA.
- How did your refund check help you and your family last year?
- How was this different from prior years?

# CHRIS TORREZ

ADVOCATE

# BENEFITS OF TAX FILING FOR TAY



# ANDREW LEPAGE

FRANCHISE TAX BOARD

# FILING A 2021 CALIFORNIA INCOME TAX RETURN

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- **When can I file my tax year 2021 state return?**

Now! FTB began accepting Jan. 3, 2022.

- **When can I file my return via FTB's FREE CalFile service?**

Now! Started Jan. 18, 2022.

- **If I owe tax this year, when is the latest I can pay to avoid interest and penalties?**

State tax returns and payments postmarked/submitted by April 18, 2022, will be considered timely this year because Friday April 15 this year is, in effect, a federal holiday.

- **What's the latest I can file my state return without a late-filing penalty?**

Under state law, all Californians can take advantage of an automatic extension to file by Oct. 15 each year (and it's Oct. 17 this year because the 15th is a Saturday).



# Why Should TAY Care About Taxes?

- Who files? Anyone with income can file.
- Key: Even if you don't have a filing requirement, consider filing your state/federal returns to:
  - Collect any refund you have coming.
  - Claim valuable state and federal tax credits.



# WHAT ARE CalEITC, YCTC & Federal EITC?

- All 3 are “refundable” tax credits that help working families.
  - They lower the tax owed or provide cash back.
- CalEITC and YCTC claimed when filing a state return.
- Federal EITC claimed when filing a federal return.
- Combined, the credits can be worth thousands of dollars.
- Money can be used for anything.



# FEDERAL EITC

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- For TY 2021, people may qualify for federal EITC if their total income less than \$57,414.
- IRS reports on its EITC website ([irs.gov/eitc](https://irs.gov/eitc)) that refunds by law are not issued prior to mid-February. Federal tax filing season began Jan. 24.
- Note: FTB does not hold CalEITC refunds; rather, it issues them within the same timeframes as any other refund – up to two weeks for direct deposit and up to two months for paper checks (assuming an e-filed return). Refunds for paper-filed returns take longer.

# CalEITC and YCTC

## BACKGROUND



- In 2015, the CalEITC was created as a supplement to federal EITC.
- CalEITC's first four years: Total of **\$1.1 billion** issued.
- Last year, nearly **\$1.3 billion** awarded for CalEITC & YCTC combined.



# CaEITC ELIGIBILITY BASICS

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## YOU MAY BE ELIGIBLE IF YOU:

- Have a Social Security Number or Individual Taxpayer Identification Number (ITIN).
- Earned less than \$30,000 in tax year.
- Have taxable income from an employer or self-employment.
- Are at least 18 years old or have a child.

# CaEITC ELIGIBILITY BASICS

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## YOU MAY BE ELIGIBLE IF YOU:

- Lived in California more than half of the year (184+ days).
- Don't use the "married/RDP filing separate" filing status.
- Didn't have 2021 investment income exceeding \$4,053.
- Cannot be claimed as a dependent on someone else's tax return.

# QUALIFYING AS AN ITIN FILER

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## YOU MAY BE ELIGIBLE IF YOU:

- CalEITC qualification process is the same for ITIN filers.
- ITIN filers don't need to provide supporting identification information to file returns and claim CalEITC/YCTC.
- As with SSN filers, FTB may sometimes request documentation from ITIN filers to verify identity and eligibility.

# YOUNG CHILD TAX CREDIT

## THE BASICS

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- Available to families making less than \$30,000.
- Individual or family qualifies for CalEITC and has at least one qualifying child under age 6 at end of tax year.
- **Up to \$1,000** per filer. (2021 average award was \$931)
- Like CalEITC, YCTC phases out as income rises.



# TY 2021 CalEITC and Federal EITC Limits



NUMBER OF QUALIFYING CHILDREN	STATE		FEDERAL		
	CALIFORNIA MAXIMUM INCOME	CALEITC (Cash Back Up To)	IRS MAXIMUM INCOME (Single, Head of Household, Widowed)	IRS MAXIMUM INCOME (Married Filing Jointly)	IRS EITC (Cash Back Up To)
None	\$30,000	\$255	\$21,430	\$27,380	\$1,502
1	\$30,000	\$1,698	\$42,158	\$48,108	\$3,618
2	\$30,000	\$2,809	\$47,915	\$53,865	\$5,980
3 or more	\$30,000	\$3,160	\$51,464	\$57,414	\$6,728

# HOW MUCH CAN A FAMILY RECEIVE?



## EXAMPLE:

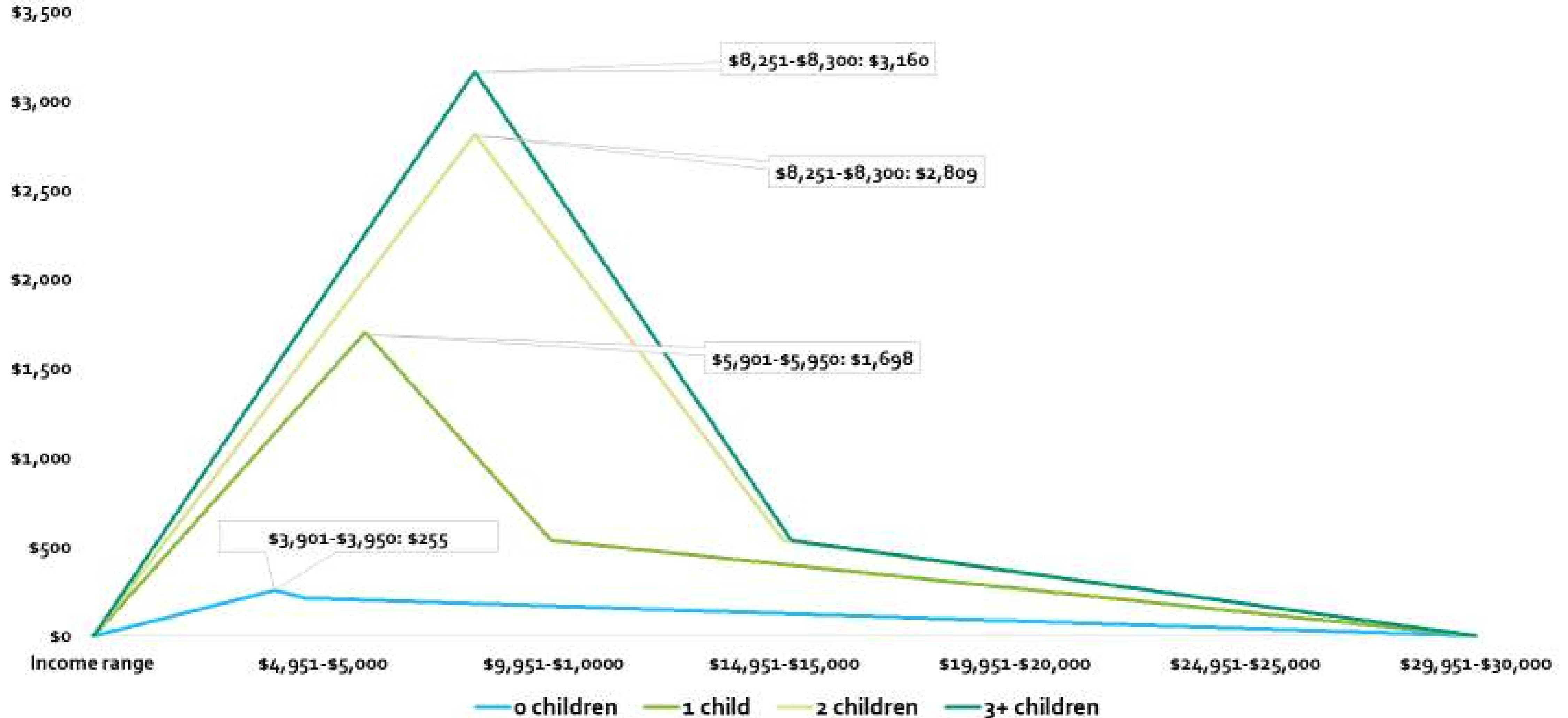
For TY 2021, a family with income of \$15,000 and 3+ dependents could receive a total of

**\$8,325**

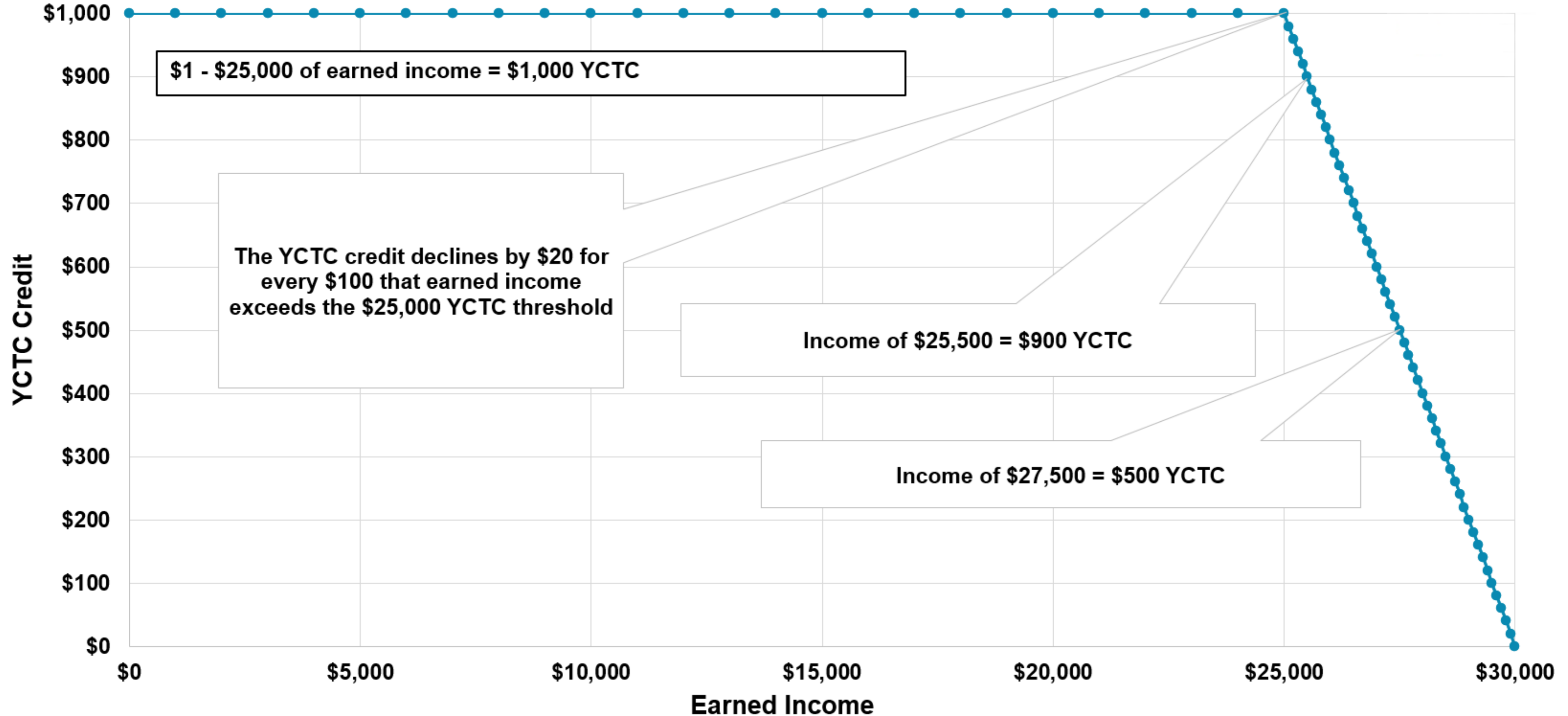
between CalEITC, YCTC and federal EITC.



# CaEITC Credit Based on Income and Number of Children



# YOUNG CHILD TAX CREDIT PHASE OUT



# FRAUD AND IDENTITY THEFT

You should be suspicious of anyone who contacts you and:

- Asks for passwords for your credit cards or bank accounts.
  - FTB & IRS agents don't ask for these details.
- Threatens to contact law enforcement to have you arrested if a tax debt is not paid.
- Claims they can settle tax debt for pennies on the dollar.



# FRAUD AND IDENTITY THEFT

## Remember:

- If you receive a letter by mail that claims to be from FTB requesting personal information, it may be a scam.
- View FTB's "Letters" web page to verify the notices we send.

If you would like additional verification,  
contact us: **1-800-852-5711**



# WHAT DO TAXPAYERS AND PREPARERS NEED TO KNOW?



- If FTB requests more info, it will come on the “FTB 4502: Additional Documentation Required — Refund Pending”
- Letter will be on FTB letterhead:



STATE OF CALIFORNIA  
FILING COMPLIANCE BUREAU MS F151  
FRANCHISE TAX BOARD  
PO BOX 1468  
SACRAMENTO CA 95812-1468

**Additional Documentation Required — Refund Pending**

# WHAT DO TAXPAYERS AND PREPARERS NEED TO KNOW?

- If a letter arrives, FTB is simply trying to verify that the taxpayer is indeed qualified to receive the credit.
- FTB will send a letter to the taxpayer within 30 days of the return being filed.
- Response needed before CalEITC and YCTC can be issued.





# FIND OUT HOW MUCH YOU COULD GET BACK

FTB.CA.GOV/CALEITC



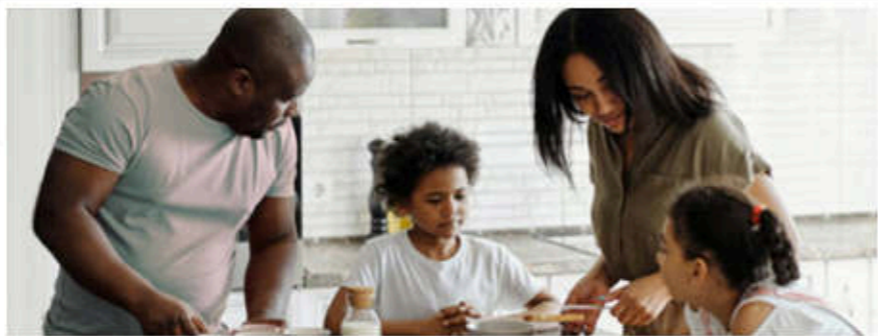
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STATE OF CALIFORNIA Franchise Tax Board

File Pay Refund Forms

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## CalEITC



[EITC calculator](#)

**Eligibility and credit information**

[Outreach materials](#)

### Put money back in your pocket.

You may qualify for cash-back tax credits and a bigger refund when you file your taxes. File early to put money in your pocket sooner!

**New** ITIN filers now eligible for CalEITC!

Some CalEITC recipients also may qualify for the [Golden State Stimulus](#).

### What is it?

The expanded California Earned Income Tax Credit (CalEITC), the Young Child Tax Credit, and the federal EITC can combine to put hundreds or even thousands of extra dollars in your pocket. That's money you can use for rent, school tuition, utilities, groceries, and other important expenses.

**Find out how much you could get back**

Use the EITC calculator for an estimate.  
(Available in 6 languages.)

[Estimate my EITC](#)

### File your taxes for free and get your money

- [Free tax help \(VITA\)](#)
- [CalFile](#)
- [More online options](#)

### Find out how much you could get back

\* Required Field

\* Language  
Select language  
English

\* How much did you earn from your California job(s) or self-employment in 2021?  
Whole dollars, no commas. Example: 12400  
\$ .00  
[Help with California earnings](#)

\* What is your filing status?  
  
[Help with filing status](#)

\* How many qualifying children do you have?  
  
[Help with qualifying children](#)

\* How much other income did you make in 2021?  
Whole dollars, no commas. Example: 12400 Enter 0 if none.  
\$ .00  
[Help with other income](#)

\* Of this other income, how much came from investments?  
Whole dollars, no commas. Example: 12400 Enter 0 if none.  
\$ .00  
[Help with investment income](#)

Select all that apply:

- Have a valid Social Security Number
- Have a valid Individual Taxpayer Identification Number
- During 2021, lived in the U.S. more than 6 months
- Also lived in California more than 6 months in 2021
- Are at least 18 years old
- Cannot be claimed as a dependent on someone else's tax return
- Had a child younger than 6 years old all of 2021 (This qualifies for YCTC)

[Estimate my EITC >](#)



## Your estimate

California EITC	\$811
Young Child Tax Credit	\$1,000
Federal EITC	\$3,069

[Re-Estimate >](#)

Note: This is an estimated report based on the information you provided in the calculator. It is possible your results will vary when you fill out your tax return. Other income or expenses not accounted for above (including but not limited to, unemployment income, IHSS income, alimony and moving expenses), could change the amount of, or affect your eligibility to claim these credits.

**File your taxes for free and get your money**

[Get free help](#) [File Online](#)

# California Earned Income Tax Credit and Young Child Tax Credit

CalEITC and YCTC



< Personal

Credits

California Earned Income Tax Credit and Young Child Tax Credit

Child adoption costs credit

Child and dependent care expenses credit

College access tax credit

Dependent parent credit

Joint custody head of household

Other state tax credit

Prior year alternative minimum tax

Nonrefundable renter's credit

Senior head of household credit

### Related content

- [See this page in español](#)
- [CalEITC](#)
- [Get free tax help from VITA](#)
- [Financial help](#)

### On this page

- [Overview](#)
- [Find out how much you could get back](#)
- [Check if you qualify for CalEITC](#)
- [What you'll get](#)
- [Claim your credit](#)
- [Tax professionals](#)
- [Federal information](#)
- [Why you got a letter](#)

## Overview

If you have low income and work, you may qualify for CalEITC. This credit gives you a refund or reduces your tax owed.

If you qualify for CalEITC and have a child under the age of 6, you may also qualify for the Young Child Tax Credit.

Together, these state credits can put hundreds or even thousands of dollars in your pocket.

Filing your state tax return is required to claim both of these credits.

**i** For tax year 2020 forward: Eligibility extends to those with an Individual Taxpayer Identification Number (ITIN)

## Find out how much you could get back

Use our EITC calculator to find out how much you can get back.

[Estimate my EITC](#)

## Check if you qualify for CalEITC

You may qualify for CalEITC if:

- You're at least 18 years old or have a qualifying child
- You have earned income within certain limits

The amount of CalEITC you may get depends on your income and family size.

You must:

- Have taxable earned income
- Have a valid social security number or individual taxpayer identification number (ITIN) for you, your spouse, and any [qualifying children](#)
- Not use "married/RDP filing separate" if married
- Live in California for more than half the year

Earned income can be from:

- W-2 wages
- [Self-employment](#)
- Salaries, tips
- Other employee wages subject to California withholding

## What you'll get

Review the chart below to see how much you may get when you file your tax year 2021 return.

2021 CalEITC credit

Number of qualifying children	California maximum income	CalEITC (up to)	IRS EITC (up to)
None	\$30,000	\$266	\$1,602
1	\$30,000	\$1,698	\$2,610

# WHERE CAN TAY GET HELP FILING RETURNS?

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- The IRS's Volunteer Income Tax Assistance (VITA) program provides help in communities around the state.
- Free tax return preparation is available to those who:
  - Earn \$57,000 or less (a general, national guideline)
  - Have disabilities
  - Speak limited English
- Visit: [irs.gov/vita](https://irs.gov/vita) or [ftb.ca.gov](https://ftb.ca.gov) and search for "VITA"
- Both sites have VITA locator tools to find a site.

# GET FREE TAX HELP

FTB.CA.GOV/HELP/FREE-TAX-HELP



CA.GOV MyFTB account Tax Pros Help Translate

STATE OF CALIFORNIA Franchise Tax Board

File Pay Refund Forms

home / help / free tax help

## Get free tax help

VITA and TCE program

- < Help
- Get free tax help
- Become a VITA volunteer
- Resources and training
- VITA knowledge check

### Related content

- [Lea esta página en español](#)
- [VITA training videos \(YouTube\)](#)

**i** Due to COVID, VITA sites have limited hours and services. Please contact your VITA location before visiting.

## Overview

You may be able to get help with your taxes for free.

This includes:

- Help with filling out forms
- What to do if you owe money
- If you qualify for the [EITC tax credit](#)

If you live in California you can get free tax help from these programs:

- **Volunteer Income Tax Assistance (VITA)**, if you:
  - Make \$57,000 or less, generally
  - Have disabilities, or
  - Speak limited English
  - Are active duty or retired military personnel, or a dependent
- **Tax Counseling for the Elderly (TCE)**, if you're at least 60 years old

## Get free tax help at a location near you

Use our VITA/TCE locator to find in-person help with your tax return.

[Find location](#)

## What to bring with you

Before you go to your local tax help site, make sure you bring the [correct papers and information](#).



- < Ways to file
- File online**
- CalFile
- Help with filing online

- On this page**
- [Free options](#)
  - [Other options \(may charge a fee\)](#)
  - [Find an authorized e-file provider](#)
  - [Free e-file help](#)

Filing online (e-file) is a secure, accurate, fast, and easy option to file your tax return.

## Free options

**CalFile**  
File directly with us – for free.

[Visit CalFile](#)

- [Cash App Taxes](#)
- [FreeTaxUSA Free File](#)
- [OLT.com](#)
- [IRS Federal Free File](#)

## Other options (may charge a fee)

- [1040now.net](#)
- [express1040.com](#)
- [eztaxreturn.com](#)
- [fileyourtaxes.com](#)
- [free1040taxreturn.com](#)
- [freetaxusa.com](#)
- [olt.com](#)
- [taxact.com](#)
- [taxhawk.com](#)
- [taxslayer.com](#)
- [turbotax.com](#)

## Find an authorized e-file provider

[Find an authorized e-file provider near you.](#)

## Free e-file help

If you have limited income and/or are over the age of 60, you may get free help e-filing your tax return through the [Voluntary Income Tax Assistance \(VITA\)](#) and [Tax Counseling for the Elderly \(TCE\)](#) program.

# HEALTH CARE MANDATE

FTB.CA.GOV & COVEREDCA.COM



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## Health care mandate

Minimum Essential Coverage Individual Mandate



The State of California is working to reduce the number of uninsured individuals and families with the adoption of a new state individual health care mandate.

**2021 Subsidy Reconciliation**  
Taxpayers who received a California Premium Assistance Subsidy (subsidies) for health coverage in 2021 may have to pay back some or all of the amount received when filing their 2021 tax return. Visit the [2021 Subsidy Reconciliation](#) page for more information, including resources for taxpayers who need assistance repaying California subsidies.

**Personal**  
Information on the new health care mandate for you and your family.  
[Personal](#)

**Tax professionals**  
Information on outreach, subsidies, penalties, reporting, and coverage.  
[Tax professionals](#)

**Penalty estimator**  
Estimate what it may cost you not to have health care coverage.  
[Penalty Estimator](#)

**Insurance providers and employers**  
Details on the new reporting mandate and how to report health insurance information.  
[Report health insurance information](#)


COVERED CALIFORNIA

Get Started Health Dental Vision Support

Sign In Shop and Compare

## More financial help for just about everyone.

Open enrollment for health insurance ends on Jan. 31. Apply today.



Household Income: \$ 28,000  
ZIP Code: 95834  
Household Size: 1  
How many need coverage?: 1  
Age of People Needing Coverage: 45

**Quick Quote**

**\$63** per month

for a Silver plan.  
Bronze plans as low as \$0.

After financial help from: Covered California

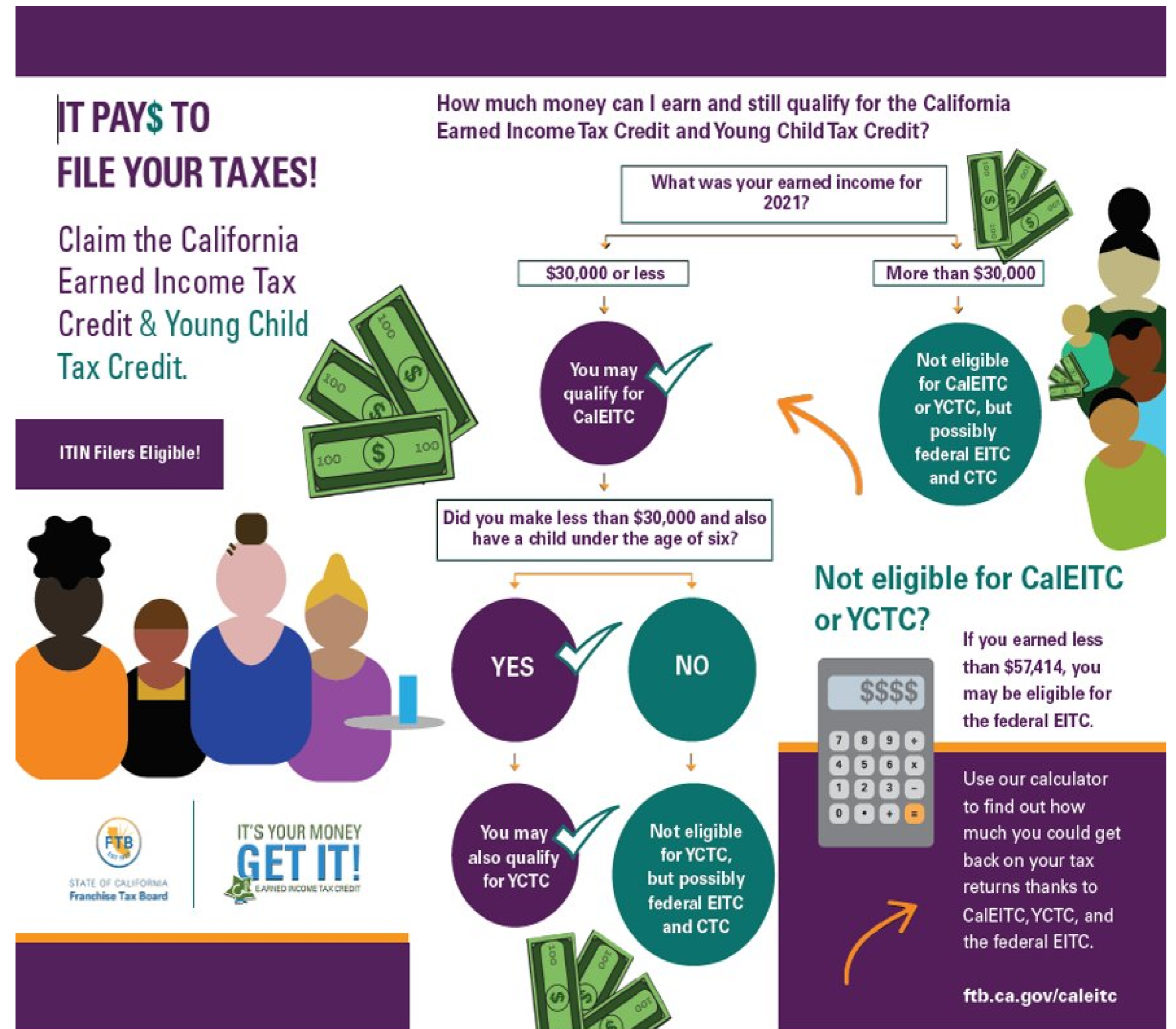
- Financial Help: \$507 per month
- Bronze, Gold and Platinum plans also available

[Calculate](#) [Learn More](#)

# RESOURCES

## HOW YOU CAN HELP

- Download CalEITC/YCTC brochures and posters.
- Brochures: English, Spanish, Chinese, Korean, Vietnamese, Hmong and Russian.
- Posters: English and Spanish.
- [ftb.ca.gov/caleitc](https://ftb.ca.gov/caleitc)





# CaEITC OUTREACH MATERIALS

FTB.CA.GOV/CALEITC



The screenshot shows the FTB website's CaEITC page. At the top, there is a dark blue navigation bar with the FTB logo, "STATE OF CALIFORNIA Franchise Tax Board", and links for "File", "Pay", "Refund", and "Forms". A secondary navigation bar includes "MyFTB account", "Tax Pros", "Help", "Translate", and a search icon. The main content area has a breadcrumb trail: "home / about ftb / newsroom / caleitc". The title "CaEITC" is prominently displayed. On the left, a sidebar menu lists "Newsroom", "CaEITC", "EITC calculator", "Eligibility and credit information", and "Outreach materials" (which is circled in yellow). Below the sidebar is a "Related Content" section with links to a Spanish version and the CaEITC Flyer (FTB 854) in multiple languages. The main content area features a photo of a family, a headline "Put money back in your pocket.", a sub-headline "New ITIN filers now eligible for CaEITC!", and a paragraph explaining that some recipients may also qualify for the Golden State Stimulus. A "What is it?" section describes the expanded California Earned Income Tax Credit (CaEITC), the Young Child Tax Credit, and the federal EITC. A call-to-action box titled "Find out how much you could get back" includes a calculator icon and a button labeled "Estimate my EITC". At the bottom, a section titled "File your taxes for free and get your money" lists links for "Free tax help (VITA)", "CalFile", and "More online options".

[home](#) / [about ftb](#) / [newsroom](#) / [caleitc](#) / outreach materials

# Outreach materials

California Earned Income Tax Credit

[< CalEITC](#)[EITC calculator](#)[Eligibility and credit information](#)[Outreach materials](#)

Resources available to help individuals learn about CalEITC.

If you would like outreach materials available in a print-ready version with crop marks, email us at [FTBPublicAffairsStaff@ftb.ca.gov](mailto:FTBPublicAffairsStaff@ftb.ca.gov) and specify each requested item (e.g., CalEITC Flat flyer (FTB 854) English, Spanish, and Vietnamese).

## Brochures and flyers

### CalEITC Flat flyer (FTB 854)

[English](#) | [Spanish](#) | [Chinese](#) | [Vietnamese](#) | [Korean](#) | [Russian](#) | [Hmong](#)

### CalEITC Trifold Brochure (FTB 855)

[English](#) | [Spanish](#) | [Chinese](#) | [Vietnamese](#) | [Korean](#) | [Russian](#) | [Hmong](#)

### CalEITC Poster/Flyer (FTB 856 A EN-SP)

[English/Spanish – 8.5" x 11"](#)

## Posters

### CalEITC Poster (FTB 856)

[English – 11" x 17"](#) | [Spanish – 11" x 17"](#)

## Social media

### CalEITC Social media toolkit

- [English](#) (ZIP file)
- [Spanish](#) (ZIP file)

### CalEITC Social media posts, multiple languages

- [Chinese](#)
- [Vietnamese](#)
- [Korean](#)
- [Russian](#)
- [Hmong](#)



# IT PAYS TO FILE YOUR TAXES!



## Claim the California Earned Income Tax Credit & Young Child Tax Credit.

ITIN Filers Eligible!



### Are you a lower-income worker?

These state tax credits, combined with the federal Earned Income Tax Credit and Child Tax Credit, can give you thousands of dollars when you file your tax returns.

To estimate your potential credits and find a place to get your tax returns done for FREE visit [ftb.ca.gov/caleitc](http://ftb.ca.gov/caleitc)

For additional resources and translations in Español (Spanish), 中文 (Chinese), Hmoob (Hmong), Tiếng Việt (Vietnamese), 한국어 (Korean), Русский (Russian), visit [ftb.ca.gov/caleitc](http://ftb.ca.gov/caleitc)

FTB 856 A EN-SP (REV 11-2021)



SCAN FOR MORE INFORMATION.

### IT PAYS TO FILE YOUR TAXES!

Claim the California Earned Income Tax Credit & Young Child Tax Credit.

How much money can I earn and still qualify for the California Earned Income Tax Credit and Young Child Tax Credit?

What was your earned income for 2021?

- \$39,000 or less: You may qualify for CalEITC.
- More than \$39,000: Not eligible for CalEITC or YCTC, but possibly federal EITC and CTC.

ITIN Filers Eligible!

Did you make less than \$39,000 and also have a child under the age of six?

- YES: You may also qualify for YCTC.
- NO: Not eligible for YCTC, but possibly federal EITC and CTC.

If you earned less than \$57,414, you may be eligible for the federal EITC.

Use our calculator to find out how much you could get back on your tax returns thanks to CalEITC, YCTC, and the federal EITC.

ftb.ca.gov/caleitc

### Put money back in your pocket.

Tell your friends!

What would you do with extra money?

- Get ahead on household bills
- Buy new clothes for the kids
- Get groceries
- Pay for health care
- Other \_\_\_\_\_

For more information, go to [ftb.ca.gov/caleitc](http://ftb.ca.gov/caleitc)

SCAN FOR MORE INFORMATION.

More Resources for Families

CalFresh, a valuable food program, has been expanded to include Supplemental Security Income (SSI) recipients. Info: [GetCalFresh.org](http://GetCalFresh.org)

To find out where you can get your tax returns done for FREE, visit [ftb.ca.gov/help/free-tax-help/](http://ftb.ca.gov/help/free-tax-help/)

### IT PAYS TO FILE YOUR TAXES!

Claim the California Earned Income Tax Credit & Young Child Tax Credit.

ITIN Filers Eligible!

ftb.ca.gov/caleitc

FTB 856 (REV 12-2021)

### Put money back in your pocket.

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What would you do with extra money?

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### Put money back in your pocket.

Tell your friends!

ftb.ca.gov/caleitc

FTB 854 (REV 12-2021)

### Put money back in your pocket.

Tell your friends!

What would you do with extra money?

- Get ahead on household bills
- Buy new clothes for the kids
- Get groceries
- Pay for health care
- Other \_\_\_\_\_

For more information, go to [ftb.ca.gov/caleitc](http://ftb.ca.gov/caleitc)

SCAN FOR MORE INFORMATION.

More Resources for Families

CalFresh, a valuable food program, has been expanded to include Supplemental Security Income (SSI) recipients. Info: [GetCalFresh.org](http://GetCalFresh.org)

To find out where you can get your tax returns done for FREE, visit [ftb.ca.gov/help/free-tax-help/](http://ftb.ca.gov/help/free-tax-help/)

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Claim the California Earned Income Tax Credit & Young Child Tax Credit.

ITIN Filers Eligible!

ftb.ca.gov/caleitc

FTB 856 (REV 12-2021)

# CaEITC SOCIAL MEDIA TOOLKIT



# WAYS TO HELP TAY GET THEIR REFUND

# 2022 TAX FILING RESOURCES

[jbay.org/resources/tax-filing/](http://jbay.org/resources/tax-filing/)



## TAX CREDITS PUT MONEY IN YOUR POCKET

A TAX FILING GUIDE FOR TRANSITION AGE YOUTH



FEBRUARY 2022



## TAX PREP CHECKLIST FOR TRANSITION AGE YOUTH

STEP 1: HAVE YOUR PERSONAL INFORMATION READY

**DO YOU HAVE A GOVERNMENT ID, DRIVER'S LICENSE, OR PASSPORT?**

**IF YES:** Your name, address, and ID number will be used to file your taxes.

**IF NO:** You can get [help obtaining your ID](#). Current and former foster youth should contact their case manager, dependency attorney, [ILP coordinator](#) or the [Ombudsperson](#) for help at 1-877-846-1602 or [fosteryouthhelp@dss.ca.gov](mailto:fosteryouthhelp@dss.ca.gov).

**DO YOU HAVE A PERMANENT ADDRESS?**

**IF YES:** Great, this will be used if you choose to have your cash back refund mailed to you as a check.

**IF NO:** That's ok - you can still file your taxes and get your refund! With their permission, you can use a health care clinic, shelter, or drop-in center's address as your permanent address.

**DO YOU HAVE A SOCIAL SECURITY NUMBER OR INDIVIDUAL TAXPAYER IDENTIFICATION NUMBER?**  
If you are married, have children or are caring for an elderly parent in your home you'll need their social security number too.



**IF YES:** You will need this number to file your taxes.

**IF NO: YOU NEED TO GET A SOCIAL SECURITY CARD / NUMBER**

You can get help [obtaining your social security card](#) from your case manager, dependency attorney, or the [Ombudsperson's office](#). If you have a Social Security Number, but you do not know what it is or have forgotten it, go to your local Social Security office. Bring as many legal identity documents as you currently have with you, such as your passport, birth certificate, driver's license, marriage license, or official name change order. You may be able to order a replacement card online.

**IF NO: YOU NEED AN INDIVIDUAL TAXPAYER IDENTIFICATION NUMBER (ITIN)**

If you do not have a Social Security Number and are not eligible for one, you may use an ITIN to file your taxes. In order to receive an ITIN number [apply online](#), use an IRS acceptance agent, or work with VITA site that offers that help. You can see if this is right for you by [completing this quiz](#).

## HOW TAX FILING BENEFITS FOSTER YOUTH

NINE THINGS EVERY FOSTER YOUTH AND THEIR ADULT SUPPORTERS SHOULD KNOW

- DECREASES POVERTY**  
Assisting foster youth with completing their taxes provides them much-needed financial support, **increasing annual income by 42% for foster youth tax filers with a dependent and 14% for single filers.** This income can help youth maintain their housing, school enrollment, food security and more.
- ENSURES ACCESS TO TAX BENEFIT PROGRAMS**  
Assisting foster youth with filing their taxes ensures that they receive the full range of ongoing state and federal income support programs as well as one-time benefit programs, such as those provided during the pandemic. **A 2021 report found that 60% of foster youth had not received these relief payments because they had not filed their taxes.**
- SUPPORTS PARENTING FOSTER YOUTH AND THEIR CHILDREN**  
Children of foster youth are at a heightened risk of maltreatment.<sup>3</sup> Assisting foster youth with filing their taxes reduces this risk by moving parenting foster youth out of deep poverty and **providing critically needed financial support to their children.**<sup>4</sup>

FOR MORE INFORMATION AND RESOURCES SEE OUR TAX FILING GUIDE: [JBAY.ORG/RESOURCES/INFORMATION-ABOUT-CALET/C/](http://JBAY.ORG/RESOURCES/INFORMATION-ABOUT-CALET/C/)



2022 Tax Season for Tax Year 2021

## TAX CAMPAIGN FOR TRANSITION AGE FOSTER YOUTH

PROMOTIONAL TOOLKIT

# 1 REVIEW AND SHARE JBAY'S TAX GUIDE WITH TAY



JBAY's EITC Guide:

[www.jbay.org/resources/tax-filing-guide/](http://www.jbay.org/resources/tax-filing-guide/)

- Written for TAY and supporters as an audience
- Contents:
  - Key terms to know
  - Cash back credits explained
  - How much cash back could you receive in your tax refund?
  - Who can file? Who has to file?
  - Tax preparation
  - Special circumstances to consider
  - Tax outreach
  - Legal changes to tax credits that benefit transition-age youth
  - Key resources

# 2 HELP TAY PREPARE TO FILE WITH A CHECKLIST

**TAX PREP CHECKLIST FOR TRANSITION AGE YOUTH**

JBAY JOHN BURTON Advocates for Youth

**STEP 1: HAVE YOUR PERSONAL INFORMATION READY**

**DO YOU HAVE A GOVERNMENT ID, DRIVER'S LICENSE, OR PASSPORT?**

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## Tax Preparation Checklist

[jbay.org/resources/tax-prep-checklist-for-transition-age-youth-2/](http://jbay.org/resources/tax-prep-checklist-for-transition-age-youth-2/)

## Commit to supporting TAY with filing taxes

- Encourage them to file
- Help them receive free reliable information, support, and materials from JBAY and other partners throughout the tax season



### 3 SHARE INFORMATIONAL MATERIALS ABOUT CaEITC AND TAXES WITH TAY AND PARTNERS ON SOCIAL MEDIA



- Follow JBAY on [Twitter](#), [Instagram](#) and [Facebook](#)
- Visit JBAY's [website](#) on tax filing and download the social media toolkits, posters, and brochures you can use for outreach
- Visit the California Franchise Tax Board's website for CaEITC brochures, posters, and information at [ftb.ca.gov](http://ftb.ca.gov) and [CaEITC4me.org](http://CaEITC4me.org) resources page

# 4 TALK TO TAY ABOUT HOW FILING BENEFITS THEM

**JBAY JOHN BURTON Advocates for Youth**

**HOW TAX FILING BENEFITS FOSTER YOUTH**  
NINE THINGS EVERY FOSTER YOUTH AND THEIR ADULT SUPPORTERS SHOULD KNOW

- DECREASES POVERTY**  
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Children of foster youth are at a heightened risk of maltreatment.<sup>3</sup> Assisting foster youth with filing their taxes reduces this risk by moving parenting foster youth out of deep poverty and **providing critically needed financial support to their children.**<sup>4</sup>

FOR MORE INFORMATION AND RESOURCES SEE OUR TAX FILING GUIDE: [JBAY.ORG/RESOURCES/INFORMATION-ABOUT-CALEITC/](https://jbay.org/resources/information-about-caleitc/)

## How Tax Filing Benefits Foster Youth [jbay.org/resources/tax-filing-foster-youth/](https://jbay.org/resources/tax-filing-foster-youth/)

- Decreases poverty
- Ensures access to tax benefit programs and cash back
- Supports parenting youth and their children
- Increases access to financial aid
- Uncovers identity theft
- Eliminates use of paid tax preparers
- Maintains eligibility for public benefits
- Establishes official income for benefits determination
- Educates and helps instill a practice of tax filing

# 5 DIRECT TAY TO FREE TAX PREP SERVICES

## Call 2-1-1 or Use Get Your Refund

[getyourrefund.org/en](https://getyourrefund.org/en)

Current and former foster youth from the pilot counties can schedule using the links below.

- Alameda, Contra Costa, and San Francisco with [First Place for Youth](#)
- [Fresno](#) with Focus Forward and Fresno Barrios Unidos
- Los Angeles with the [Coalition for Responsible Community Development](#) and [The Community College Foundation](#)
- Santa Clara with Bill Wilson Center at [the Hub](#)

## VITA LOCATOR TOOL

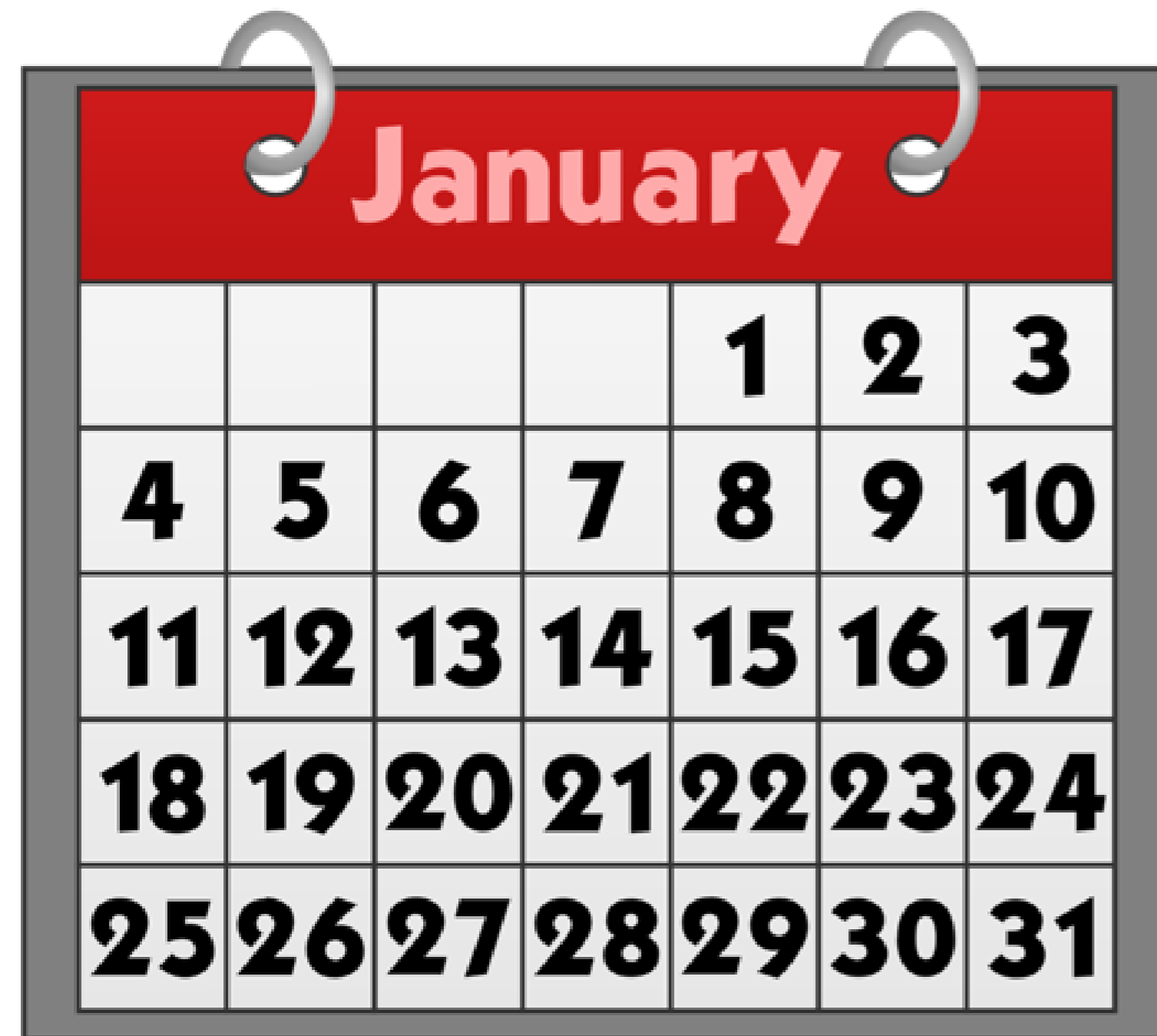
[irs.treasury.gov/freetaxprep/](https://irs.treasury.gov/freetaxprep/)

The screenshot shows the IRS VITA Locator Tool interface. At the top is the IRS logo. Below it is a search bar with the ZIP code '94104' entered and a dropdown menu set to '10' miles. A 'Find >>' button is visible. Below the search bar, it says '31 results found' with navigation arrows. A table of results is displayed with columns for Provider, Distance, Dates, Hours, Languages, and Appointment. Two providers are visible in the table.

Provider	Distance	Dates	Hours	Languages	Appointment
United Way Bay Area 550 Kearny Street Ste 1000 Mobile Site - Call 211 for information San Francisco, CA 94108 Volunteer Prepared Taxes <a href="#">Get Directions and Service Details</a>	0.1 MI	01 FEB 2022 - 15 APR 2022		English Cantonese Mandarin Spanish	Required
NECFU - Chinatown 778 Clay St 3rd Floor San Francisco, CA 94108 415-434-0738 Volunteer Prepared Taxes <a href="#">Get Directions and Service Details</a>	0.3 MI	01 FEB 2022 - 31 MAR 2022	MON 11:00AM - 3:00PM TUE 11:00AM - 3:00PM WED 11:00AM - 3:00PM THU 11:00AM - 3:00PM FRI 11:00AM - 3:00PM	Chinese English Cantonese Mandarin	Not Required

## 6 HELP TAY FILE FOR PREVIOUS YEARS AND SAVE IMPORTANT TAX DOCUMENTS

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TAY can **file previous year's taxes** up to three prior tax years.

They will need to gather their **tax information from those prior years** and can use the same checklist to prepare.

How to **organize** tax documents:

[www.taxslayer.com/blog/how-to-organize-your-tax-documents-for-the-new-year/](http://www.taxslayer.com/blog/how-to-organize-your-tax-documents-for-the-new-year/)

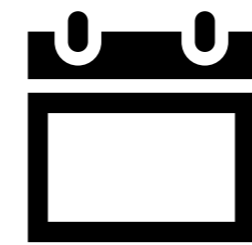


# WAYS TO HELP TAY GET THEIR REFUND

TIPS FOR COUNTY CHILD WELFARE AGENCIES

**CINDY GUILLEN**  
SANTA CLARA COUNTY

# 1 DEDICATE TIME BETWEEN FEBRUARY AND OCTOBER



Tax Season 2022

January 24<sup>th</sup> – April 18<sup>th</sup>  
or October 17<sup>th</sup>

## OUTREACH PLAN

- Staff Memo & Activities
- HUB Mailer
- Outreach Blasts & Circulation
- Tax Event Dates and Times
- Site Hours of Operation

## 2 INTEGRATE INFORMATION ON THE CaIEITC INTO EXISTING TAY PROGRAMS AND SERVICES

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- **Transitional Independent Living Plan** or case plan
- **Credit history checks** or credit report review
- **Team meetings:** Child and Family Team (CFT) meetings, Team Decision Making (TDM) meetings, 90-Day Transition Plan meetings and parenting conferences
- **Independent Living Program** curriculum – as part of the core service of financial literacy

# 3 EDUCATE YOURSELF AND YOUR COLLEAGUES ON TAX CREDITS AND OUTREACH MATERIALS THAT MAY BENEFIT THE YOUTH YOU WORK WITH

All County Information Notice 2021:  
[https://cdss.ca.gov/Portals/9/Additional-Resources/Letters-and-Notices/ACINs/2021/I-99\\_21.pdf?ver=2022-01-20-080944-730](https://cdss.ca.gov/Portals/9/Additional-Resources/Letters-and-Notices/ACINs/2021/I-99_21.pdf?ver=2022-01-20-080944-730)


Host Staff Trainings

One on One Consults with Social Workers



KIM JOHNSON  
DIRECTOR

STATE OF CALIFORNIA—HEALTH AND HUMAN SERVICES AGENCY  
**DEPARTMENT OF SOCIAL SERVICES**  
744 P Street • Sacramento, CA 95814 • [www.cdss.ca.gov](http://www.cdss.ca.gov)



GAVIN NEWSOM  
GOVERNOR

December 23, 2021

ALL COUNTY INFORMATION NOTICE NO. I-99-21

TO: ALL COUNTY WELFARE DIRECTORS  
ALL COUNTY WELFARE-TO-WORK COORDINATORS  
ALL CALWORKS PROGRAM SPECIALISTS  
ALL CALFRESH PROGRAM SPECIALISTS  
ALL REFUGEE PROGRAM COORDINATORS  
ALL COUNTY CHILD CARE COORDINATORS  
ALL TRIBAL TANF ADMINISTRATORS  
ALL CONSORTIA PROJECT MANAGERS

SUBJECT: 2021 EARNED INCOME TAX CREDIT (EITC) OUTREACH PUBLICATIONS

REFERENCE: [H.R. 1319 AMERICAN RESCUE PLAN ACT OF 2021](#); [ASSEMBLY BILL \(AB\) 1876 \(CHAPTER 87, STATUTES OF 2020\)](#); [WELFARE AND INSTITUTIONS CODE \(WIC\) SECTION 11322.5](#); [ALL COUNTY LETTERS \(ACL\) NO. 17-120, ACL NO. 15-87, ACL NO. 13-46, ACL NO. 11-13, AND ACL NO. 11-13E](#); [ALL COUNTY INFORMATION NOTICE \(ACIN\) NO. I-85-16, ACIN NO. I-75-18, ACIN NO. I-68-19, AND ACIN NO. I-71-20](#); [MANUAL POLICIES AND PROCEDURES \(MPP\) SECTIONS 21-115.2, MPP 42-213.518, MPP 44-101\(I\)\(SAR\)\(1\), MPP 44-111.3\(I\), AND MPP 44-111.6\(I\)](#)

The purpose of this All County Information Notice (ACIN) is to notify County Welfare Departments (CWDs) that the Earned Income Tax Credit (EITC) outreach publications, Pub 428 and Pub 429, have been revised for the 2021 tax year. The federal EITC income limits have increased for 2021, while the CalEITC income limit remains at \$30,000. The federal EITC and the CalEITC maximum credit amounts both increased.

[Assembly Bill \(AB\) 1876 \(Chapter 87, Statutes of 2020\)](#), expanded the CalEITC to ensure all California tax filers, including undocumented Individual Tax Identification Number (ITIN) filers who are otherwise eligible, may qualify for the CalEITC and the Young Child Tax Credit (YCTC). The YCTC is an additional credit of up to \$1,000 for



# TAX LITERACY & TAX FRAUD



# ELIZABETH WELLS

LAW FOUNDATION OF SILICON VALLEY

LAW FOUNDATION OF SILICON VALLEY IS OFFERING  
**YOUTH TAX BASICS TRAININGS (Statewide) AND LEGAL ASSISTANCE (Santa Clara County)**

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### **Income Tax Basics**

- Why you should file taxes
- Earned Income Tax Credit (EITC) overview
- What to know about the Child Tax Credits
- Basic tax forms
- Where to get help filing taxes

### **Tax ID Theft**

- What are the signs
- Steps to address tax fraud
- Avoiding tax scams



**To request youth training, contact  
Elizabeth Wells at  
[fyidtheft@lawfoundation.org](mailto:fyidtheft@lawfoundation.org)**

# TAX IDENTITY THEFT SUPPORT

## Common tax identity theft issues:

- Someone used youth SSN to file a tax return
- Someone claimed you as a tax dependent
- Someone claimed your child as a tax dependent
- Gathering information needed to verify identity/eligibility
- Submitting IRS/FTB Identity Theft forms
- Obtaining IP PIN

## Tax Identity Theft

### Signs that you may be a victim:

- You get a letter from the IRS inquiring about a suspicious tax return that you did not file.
- You can't e-file your tax return because of a duplicate Social Security number.
- You get a tax transcript in the mail that you did not request.
- You get an IRS notice that an online account has been created in your name
- You get an IRS notice that your existing online account has been accessed or disabled when you took no action.
- You get an IRS notice that you owe additional tax or refund offset, or that you have had collection actions taken against you for a year you did not file a tax return
- IRS records indicate you received wages or other income from an employer you didn't work for.



# WOULD YOU LIKE TAX TRAININGS FOR YOUTH IN YOUR COUNTY?

LFSV, JBAY and Santa Clara County are collaborating to provide tax assistance to youth as part of the Santa Clara County Foster Youth VITA Pilot Project.

LFSV provides financial literacy trainings to current and former foster youth.

- How the tax system works
- Tax credits and benefits
- How to navigate identity theft and scams.

LFSV provides trainings to social workers, ILP managers and CASAs so that they can better support youth with these crucial financial literacy matters.

If you would like a free ILP class or staff training - contact Elizabeth at [fyidtheft@lawfoundation.org](mailto:fyidtheft@lawfoundation.org) to schedule a time to learn more about the virtual trainings.

# OVERVIEW OF HOW TAXES ARE CALCULATED

## How Does The Government Determine How Much You Have To Pay In Taxes?

How much you pay in taxes depends mainly on three things:

- 1 - Your age
- 2 - Your filing status
- 3 - Your taxable income



## The United States uses a PROGRESS TAX SYSTEM

Filing status:

- Single
- Married, filing jointly
- Married, filing separately
- Head of household

### Example of Single Status Federal Income Tax bracket

Tax rate	Taxable income bracket	Tax owed
10%	\$0 to \$9,875	10% of taxable income
12%	\$9,876 to \$40,125	\$987.50 plus 12% of the amount over \$9,875
22%	\$40,126 to \$85,525	\$4,617.50 plus 22% of the amount over \$40,125
24%	\$85,526 to \$163,300	\$14,605.50 plus 24% of the amount over \$85,525
32%	\$163,301 to \$207,350	\$33,271.50 plus 32% of the amount over \$163,300
35%	\$207,351 to \$518,400	\$47,367.50 plus 35% of the amount over \$207,350
37%	\$518,401 or more	\$156,235 plus 37% of the amount over \$518,400

# WHAT IS MY TAXABLE INCOME

## What Is My Taxable Income ?

Taxable income generally includes **salary, tips (cash), vacation and sick pay.**

Taxable income for Foster Youth does **NOT** include:

- Foster care money
- CalFresh
- Santa Clara County Universal Basic Income (UBI)

Some **financial aid** is considered taxable income. Usually amounts listed under “books and supplies” and “tuition and fees” are *not* taxable income, while amounts listed under “living expenses” are taxable. Check out JBAY’s Guide

[www.jbay.org/resources/tax-filing/](http://www.jbay.org/resources/tax-filing/)

## Sample Paycheck 2

06/02/06 to 06/16/06		Required Deductions	
		Federal Income Tax	00.00 00.00
		FICA - Medicare	06.08 12.16
		WI State Income Tax	00.00 00.00
		FICA - Social Security	25.92 51.84
Period	YTD	Other Deductions	
06/02/06	900.00		
06/02/06	900.00		
		Health Insurance	00.00 00.00
		401k	00.00 00.00
		Parking	00.00 00.00
		<b>NET PAY</b>	<b>\$418.00 \$836.00</b>

Check Number: XXXXXX  
Pay Date: 06/19/06

\*\*\*\*\*\$418.00

Some common abbreviations used on paycheck stubs:

**Gross:** Earnings before deductions

**Net:** Earnings after deductions

**Current:** Pay period earnings

**YTD:** Year-To-Date

**REG:** regular hours worked

**OT:** overtime hours worked

**FICA:** Employee's portion of Social Security paid

**FICA-MED:** Medicare deductions

**SWT or Fed:** Federal withholding Income Tax deductions

**SWT or State:** State Tax withheld

**LT or Local Tax:** County and/or City Tax deductions

**WC or Work Comp:** workman's comp contribution, usually paid by employer

**INS or MED:** insurance or medical savings account deductions

**Garnish:** garnishment being taken from employee's check due to money owed

# TAX FORMS NEEDED TO FILE TAXES

## Individual Income Tax: How does it work?

Does this look familiar? Have you received one of these before?

For Official Use Only  
OMB No. 1545-0048  
Form **W-2** Wage & Tax Statement  
Department of the Treasury - Internal Revenue Service 0000/0000

22222  Void  a Employee's social security number 400-00-4060

b Employer identification number 35-6321571 c Control number

d Employer's name, address, and ZIP code  
LOAFER SANDWICH SHOPPE  
14A LOAFERS LAND  
INDIANAPOLIS IN 46210

e Employee's first name & initial Last name Suffix  
JEST HERTIA  
15 LAID BACK WAY  
INDIANAPOLIS IN 46204

f Employee's address and ZIP code

16 State Employer's state ID number IN 00122231001 15 State wages, tips, etc. 2420.00 17 State income tax 73.00 18 Local wages, tips, etc. 2420.00 19 Local income tax 19.00 20 Locality MARIO

1 Wages, tips, other comp. 2420.00 2 Federal income tax withheld 300.00  
3 Social security wages 2420.00 4 Social security tax withheld 133.00  
5 Medicare wages and tips 2420.00 6 Medicare tax withheld 31.00  
7 Social security tips 8 Allocated tips  
9 Advance EIC payment 10 Dependent care benefits  
11 Nonqualified plans 12a See instructions for box 12  
13 12b  
14 12c  
12d



## Individual Income Tax: How does it work?

What you need to know about your W-2



- The IRS requires employers to report wage and salary information for employees on Form W-2.
- Your W-2 reports important details about the amount of federal, state and other taxes withheld from your paycheck.
- Your Form W-2 should be sent by January 31st of each year and be used to prepare your tax return





- How did filing without support impact you?
- How did filing with support impact you?
- Why is outreach from trusted messengers important for foster youth?

# ALEXIS BARRIES

ADVOCATE

# MORE WAYS TO HELP TAY TODAY!

# SUPPORT THE FOSTER YOUTH TAX CREDIT PROPOSAL INCLUDED IN GOVERNOR NEWSOM'S JANUARY BUDGET



Sign on to the coalition letter here:  
[form.jotform.com/220197910979164](https://form.jotform.com/220197910979164)

## \$21 million – Foster Youth Tax Credit

Establishes a **\$1,000** refundable tax credit for transition-age foster youth between ages 18 through 25 who were in care on or after age 13.

The proposal is supported by:

- State Controller Betty T. Yee
- Senator Ana Caballero
- John Burton Advocates for Youth
- CalEITC+ Coalition

# UPCOMING EVENTS

# UNITED WAY OF CA

## INSTAGRAM LIVE EVENT FOR FOSTER YOUTH

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Wednesday, Feb. 2, 2022 at 12:30 p.m.

### Helping Foster Youth Achieve Financial Stability

Instagram Live: [@UnitedWaysCa](#)  
with [@JBAforYouth](#)

Invite Current and Former  
Foster Youth to Learn  
More About:

- Why to file
- How to file
- Where to file
- Documents you need to file
- and more

# FREE TAX FILING EVENT FOR COMMUNITY COLLEGE STUDENTS AND CURRENT AND FORMER FOSTER YOUTH



Thursday, February 3, 2022 at 12:30pm

## Tax Time 101:

File your taxes for free *and* with confidence

- Learn how at this webinar just for Community College students.
- Tax experts will walk you through your options to prepare your taxes for free and claim the deductions and credits you deserve!
- RSVP:  
[https://us06web.zoom.us/webinar/register/WN\\_IkoCQD3QS7WoxBkCmY3Zdg](https://us06web.zoom.us/webinar/register/WN_IkoCQD3QS7WoxBkCmY3Zdg)

### SOCIAL MEDIA POST

Tax time is here! Join @GSOppportunity & @TaxTimeAllies on Thursday, February 3 at 12:30 pm to find out how to prepare your taxes for free.

RSVP: [https://us06web.zoom.us/webinar/register/WN\\_IkoCQD3QS7WoxBkCmY3Zdg](https://us06web.zoom.us/webinar/register/WN_IkoCQD3QS7WoxBkCmY3Zdg) #CalEITCWeek

# TAX PREP WORKSHOPS IN THE SACRAMENTO REGION

Saturday, February 26, 2022

8 a.m. to 11 a.m.

## Free Tax Prep Workshop:

Learn how to prepare your own taxes! [RSVP](#)

Saturday, March 12, 2022

8 a.m. to 11 a.m.

## Free Tax Prep Workshop

Learn how to prepare your own taxes! [RSVP](#)

Learn how to **prepare your own taxes!**

**FREE TAX PREP WORKSHOP**  
A VIRTUAL EVENT

*You may qualify for tax credits based on education, income, and eligible children in your household.*

SMUD citi EITC 4me United Way California Capital Region

The graphic features a blue background on the left with a white silhouette of Benjamin Franklin pointing. The right side has a green background with the text 'FREE TAX PREP WORKSHOP' in large, bold letters. Below this, it says 'A VIRTUAL EVENT'. At the bottom, there is a blue banner with logos for SMUD, citi, EITC 4me, and United Way California Capital Region. A small icon of a dollar sign is next to the text 'You may qualify for tax credits based on education, income, and eligible children in your household.'

### Partners Include:

- United Way California Capitol Region
- Sacramento County Social Services Agency
- CalEITC4Me
- Asian Resources Inc
- Sacramento Municipal Utility District
- John Burton Advocates for Youth

# QUESTION & ANSWER SESSION



# QUESTION & ANSWER SESSION

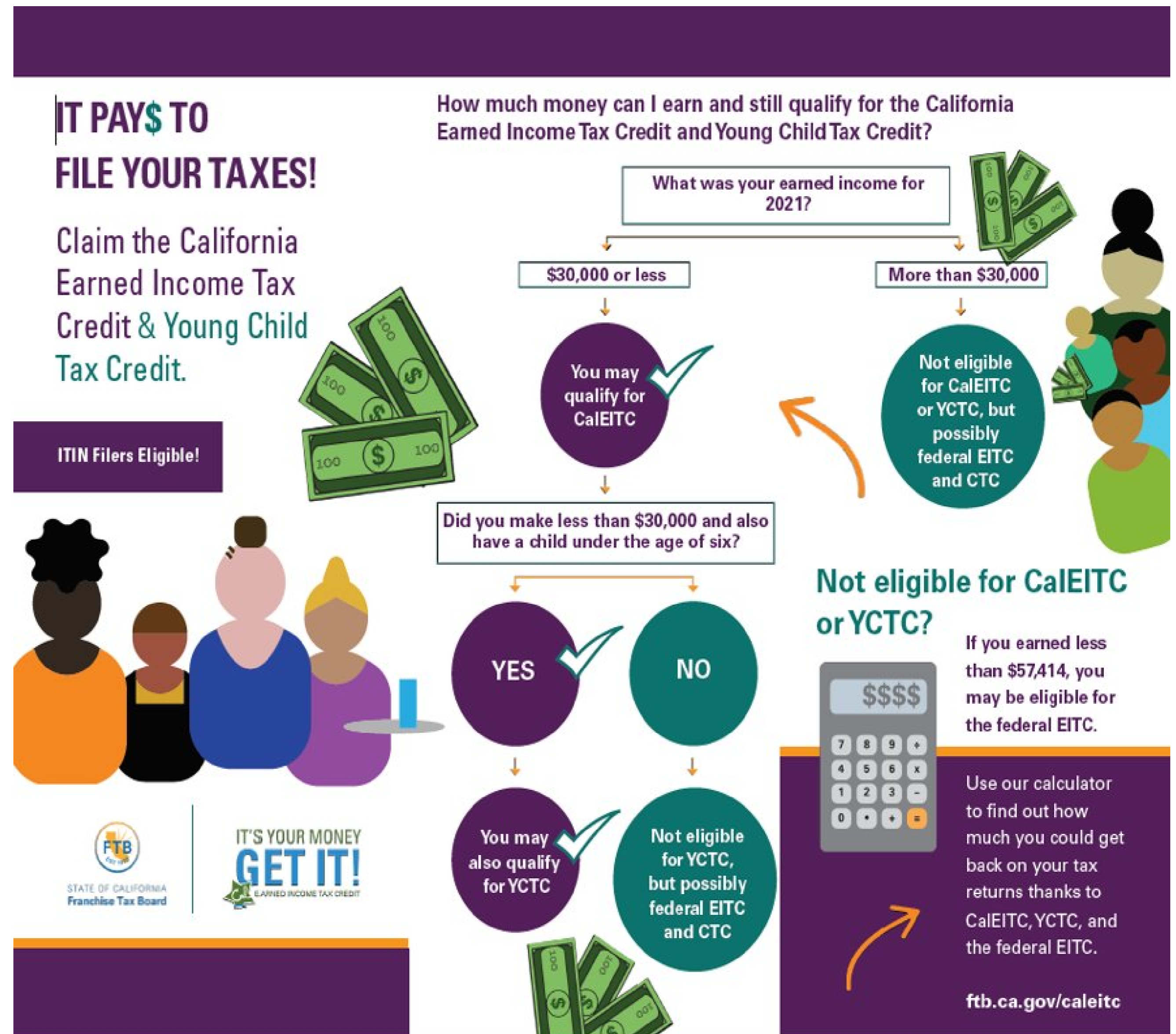
For more information, contact:

Andrew LePage  
[Andrew.LePage@ftb.ca.gov](mailto:Andrew.LePage@ftb.ca.gov)

Anna Johnson  
[Anna@jbay.org](mailto:Anna@jbay.org)

Cindy Guillen  
[Cindy.Guillen@ssa.sccgov.org](mailto:Cindy.Guillen@ssa.sccgov.org)

Elizabeth Wells  
[Elizabeth.wells@lawfoundation.org](mailto:Elizabeth.wells@lawfoundation.org)



# THANK YOU

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[JBAY.ORG](https://JBAY.ORG)