



## COVID-19 Stimulus Payments Information and Resources

—Last updated: September 3, 2021—

### TIME-SENSITIVE UPDATE

From the Social Security Administration's Economic Impact Payment web page at <https://www.ssa.gov/coronavirus/eip/?tl=0> (please note the **October 15, 2021 deadline** for using the IRS non-filer tool):



- **How Can I Get Missing Economic Impact Payments?** The IRS has already issued stimulus payments to most individuals who get Supplemental Security Income (SSI) and Social Security retirement, disability, or survivors benefits. If you did not get a first or second EIP for you or someone in your household including dependents, or if you got less than the full amount, you may be eligible to [claim the 2020 Recovery Rebate Credit](#) by using the [IRS' Child Tax Credit Non-Filer Sign-up tool](#) by **October 15, 2021**.
- This updated tool is designed to help eligible individuals who don't normally file income tax returns register for the third round of EIPs and claim the 2020 Recovery Rebate Credit for the first two rounds of EIPs they may have missed. While most Social Security recipients were paid EIPs automatically, family members were not paid automatically unless you previously filed a 2019 or 2020 tax return, or used the Non-Filer tool. Using the Non-Filer tool now will create a 2020 tax return for you automatically. Please remember that you must use the Non-Filer Tool by October 15, 2021.
- The IRS will process your tax return and send you any payments for you, an eligible spouse, and your eligible dependents. If you have questions about EIPs, visit [www.irs.gov/eip](http://www.irs.gov/eip).

### OVERVIEW: Stimulus Payments

1. **Economic Impact Payments** - three separate payments, in different amounts, from the U.S. Government to qualifying individuals.
2. **Golden State Stimulus<sup>1</sup> ("GSS")** - one-time payment of \$600 or \$1200 from the Cal-

1 <https://www.ftb.ca.gov/about-ftb/newsroom/golden-state-stimulus/index.html>



ifornia state government to qualifying individuals. You may receive this payment if you receive the California Earned Income Tax Credit (CalEITC) or file with an Individual Taxpayer Identification Number (ITIN).

3. **Golden State Grant Program<sup>2</sup> (“GSG”)** - one-time payment of \$600 from the California state government for CalWORKs families, as well as a one-time payment (“Supplemental SSP Payment”) of \$600 from the California state government for individuals receiving SSI/SSP or CAPI benefits.

## **ECONOMIC IMPACT PAYMENTS**

An **Economic Impact Payment** (also known as a “stimulus check”) is money that the U.S. government gave to qualifying individuals to help them during the COVID-19 crisis. As of July 5, 2021, the U.S. government has authorized three Economic Impact Payments. If you did not get your first and/or second payment, you can claim it as a **Recovery Rebate Credit**.

A “qualifying individual” who could receive Economic Impact Payments or Recovery Rebate Credits is a US citizen, permanent resident or resident alien who:

1. Has a Social Security number valid for work;
2. Could not be claimed as a dependent of another taxpayer; and
3. Has an adjusted gross income of less than \$99,000 (singles) or \$198,000 (joint filers)

## **The amount of your Economic Impact Payment(s) and/or Recovery Rebate Credit(s)**

### **1. First Economic Impact Payment (“EIP 1”)**

- Single and earn less than \$75,000/year ———> you can get \$1,200.
- Married and file jointly and earn less than \$150,000/year ———> you can get \$2,400
- Head of household and earn less than \$112,500 ———> you can get \$1,200.
- You can get \$500 for every child under 17 years old who you claim as a dependent.
- Individuals who have higher incomes will have their payment amount reduced based on their income above the amounts provided above.

2 <https://www.cdss.ca.gov/inforesources/cdss-programs/golden-state-grant-program>



## 2. Second Economic Impact Payment (“EIP 2”)

- Single and earn less than \$75,000/year ———> you can get \$600.
- Married and file jointly and earn less than \$150,000/year ———> you can get \$1,200
- Head of household and earn less than \$112,500 ———> you can get \$600.
- You can get \$600 for every child under 17 years old who you claim as a dependent.
- Individuals who have higher incomes will have their payment amount reduced based on their income above the amounts provided above.

## 3. Third Economic Impact Payment (“EIP 3”)

- Single and earn less than \$75,000/year ———> you can get \$1,400.
- Married and file jointly and earn less than \$150,000/year ———> you can get \$2,800
- Head of household and earn less than \$112,500 ———> you can get \$1,400.
- You can get \$1,400 for every individual you can claim as a dependent - including dependents over age 17.
- Individuals who have higher incomes will have their payment amount reduced based on their income above the amounts provided above.

Note: The amount of payment(s) that you are eligible to receive is generally calculated based on your income on your 2019 tax return, unless you filed your 2020 tax return before payments were sent. **If your income dropped in 2020 as a result of the pandemic and you qualify for a larger stimulus payment, the IRS should issue a second adjusted payment once the 2020 tax returns are processed.**<sup>3</sup>

## Getting your Economic Impact Payment(s)

- The IRS announced that, as of January 15, 2021, it distributed all of the first and second Economic Impact Payments that it will be distributing. **If you did not get your first or second Economic Impact Payment, or if you got the wrong amount, you can still claim the payment(s) as a “Recovery Rebate Credit” by filing a 2020 tax return or by using the online [IRS Non-Filer Portal](#). [Please see the Tax Assistance Organizations section below](#) for more information about free tax assistance.**
- The IRS started sending out the third Economic Impact Payment in March 2021. If you did not get your third Economic Impact Payment, you can get it by claiming your first or second Economic Impact Payment(s) as “Recovery Rebate Credit” as described

<sup>3</sup> <https://www.consumerfinance.gov/coronavirus/managing-your-finances/guide-economic-impact-payments/#receive>



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above, OR by filing your 2021 tax return in 2022.

- **First Economic Impact Payment / EIP 1**

- You should have automatically received your first Economic Impact Payment if:
  - » You filed your 2018 or 2019 tax returns;
  - » You were receiving Social Security retirement, survivors or disability insurance (“RSDI”), Supplemental Security Income (“SSI”) benefits as of November 2020; or
  - » You were getting Veterans Affairs (“VA”) benefits or Railroad Retirement Benefits (“RRB”) before January 1, 2020.
- You should have also received your Economic Impact Payment if:
  - » You registered successfully on the IRS’ Non-Filer Registration Portal before November 21, 2020; or
  - » You filed a Simplified Paper Return and mailed it to the IRS before October 30, 2020.
- You should have automatically received a supplemental Economic Impact Payment for any of your dependent child(ren) if:
  - » You filed a 2018 or 2019 tax return and claimed your dependent(s) on that tax return.
  - » You registered any dependent(s) on the Non-Filer Registration portal before September 30, 2020.
- **If you did not get your first Economic Impact Payment, you can still claim it as a “Recovery Rebate Credit” by filing your 2020 taxes or by using the online [IRS Non-Filer Portal](#). [Please see the Tax Assistance Organizations section below](#) for more information about free tax assistance.**

- **Second Economic Impact Payment / EIP 2**

- The second Economic Impact Payments were distributed during January 2021, and, in general, they were being distributed automatically to anyone who received the first Economic Impact Payment.
- According to the IRS, you should receive your second payment in the same form that you received your first one. So if you got your first one by mail, you will receive the second one to the same mailing address. Similarly, if you got your first one as a direct deposit to your bank account, the second one will be deposited there as well.



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- If you did not get your second Economic Impact Payment, you can still claim it as a “Recovery Rebate Credit” by filing your 2020 taxes or by using the online [IRS Non-Filer Portal](#). [Please see the Tax Assistance Organizations section below](#) for more information about free tax assistance.
- **Third Economic Impact Payment / EIP 3**
  - The third Economic Impact Payments started being distributed in March 2021, and, in general, they are being distributed automatically to anyone who received the first or second Economic Impact Payment and to anyone who filed a 2020 tax return.
  - According to the IRS, you should receive your third payment in the same form that you received your first or second one. So if you got your others by mail, you will receive the third one to the same mailing address. Similarly, if you got your first or second payments as a direct deposit to your bank account, the second one will be deposited there as well.

## Is it possible that I am eligible for only one of the Economic Impact Payments but not all of them?

- In general, the rules for eligibility are the same for all three Economic Impact Payments. However, there are some important exceptions, including:
  - **Mixed Status Households.** If you are in a household where only one spouse has a valid Social Security Number, the rules changed for eligibility after the first payment. Now, the spouse with the Social Security number can receive the second and third Economic Impact Payments and dependent amounts. Further, the spouse with the Social Security Number can retroactively claim the first Economic Impact Payment (\$1200) and any dependent payments.
    - » Please contact a free tax assistance organization for support and filing your 2020 tax return. [Please see the Tax Assistance Organizations section below](#) for more information about free tax assistance.
  - **Child Support Arrears.** Individuals who owed more than \$150 in child support payments were not eligible for the first Economic Impact Payment. However, these individuals are not barred from receiving the second or third Economic Impact Payments due to child support arrears. If you did not get the first payment due to child support arrears, you may still be eligible for the second and/or third payments.





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- For more information and detail about eligibility, please visit <https://www.consumerfinance.gov/coronavirus/managing-your-finances/guide-economic-impact-payments/#eligible> and click on “Eligibility requirements for each stimulus payment”.

## **I didn't get my Economic Impact Payment(s) or dependent amount(s) and need to file a tax return - will my Recovery Rebate Credit be the same amount as the Economic Impact Payment and dependent amounts?**

- Unfortunately, the rules for the Recovery Rebate Credit are slightly different than the rules for Economic Impact Payments. Therefore, it is possible that you could get a lower amount of the Recovery Rebate Credit even if you qualified for the full amount(s) of Economic Impact Payment.
  - The first Economic Impact Payment could only be offset by child support arrears for the first one.
  - The second Economic Impact Payment could not be offset by any debts.
- However, the Recovery Rebate Credit is treated like any other tax credit, and can be offset by a number of debts, including unpaid taxes, student loans, child support and more. The IRS recently announced that it would exercise its discretion, and not automatically offset the Recovery Rebate Credit amount for federal debts. Thus, as of April 2021, the Recovery Rebate Credit amount may still be offset by any state debts, but not federal debts.
- **This means that if you are an eligible individual who did not receive your full Economic Impact Payment(s), and you have certain outstanding state debts, some or all of your payment may be withheld by the IRS to cover your debts.**
- If you have outstanding debts, you should contact a Tax Assistance Organization before filing a 2020 tax return to discuss your specific situation. [Please see the Tax Assistance Organizations section below](#) for more information about free tax assistance.
- If you have outstanding tax debts, you can also contact the Taxpayer Advocate Service before filing a 2020 tax return. They may be able to assist you in requesting an “offset bypass refund” if you can prove you are struggling with “financial hardship.” Please visit <https://www.taxpayeradvocate.irs.gov/about-us/> or call (877) 777-4778 to contact the Taxpayer Advocate.

For general information on Economic Impact Payments, please visit <https://www.irs.gov/>



[coronavirus/economic-impact-payment-information-center](https://www.bayarealegalaid.org/coronavirus/economic-impact-payment-information-center) and <https://www.irs.gov/coronavirus/second-eip-faqs>.

## Tax Assistance Organizations

In order to receive your stimulus payment(s), you may need to file a 2020 tax return **before October 15, 2021**. You can get free high quality tax assistance from a number of organizations. You do not need to pay for tax assistance to file your tax return. Below are a number of organizations offering free high quality tax assistance to low-income individuals. Please note that most of these organizations will require you to make an appointment, and will also ask you for identification, your Social Security card, and any recent tax documents:

- **Volunteer Income Tax Assistance (“VITA”)** - To find the free VITA site closest to you, visit <https://irs.treasury.gov/freetaxprep/> or call (800) 906-9887.
- **United Way of the Bay Area** – <https://earnitkeepitsaveit.org/> or call 2-1-1.
- **Chinese Newcomers Service Center** - Call (415) 421-2111 to make an appointment to drop off your documents at their office in San Francisco. Visit <https://chinesenewcomers.org/en/volunteer-income-tax-assistance-program-vita/> for more information.

If you are comfortable claiming your stimulus payments on your own, and you have access to a computer and internet, you can also use the IRS tools to claim your payments:

- **IRS Tax Filing Site** - Free tax filing available online at the IRS website - <https://www.irs.gov/filing/free-file-fillable-forms/free-file-fillable-forms-is-closed>
- **IRS Non Filer Portal** - Free tax filing available online at the IRS website - [irs.gov/credits-deductions/child-tax-credit-non-filer-sign-up-tool](https://www.irs.gov/credits-deductions/child-tax-credit-non-filer-sign-up-tool) - for individuals who do not need to file a tax return and are **ONLY** trying to claim their stimulus payment(s).
  - The Non-Filer Portal is referred to as the “Child Tax Credit Non-Filer Portal” because it can also be used to claim the Child Tax Credit in addition to the Stimulus Payments.



## THE BASICS: California's Stimulus Payments

In addition to the Economic Impact Payments from the federal government, you may be eligible for additional stimulus payments from the state of California. Below is a summary of the many COVID-19 relief payments specifically issued by the state of California.

Please note that in order to claim any of these payments, you may need to file a **California state tax return**. [Please see the Tax Assistance Organization section](#) for more information.

### 1. GOLDEN STATE STIMULUS PROGRAM ("GSS")

- The GSS provides a one-time payment of \$600 or \$1200 to qualifying individuals.
- To qualify for the GSS, you must:
  - » Have filed your 2020 taxes on or before October 15, 2021;
  - » Be either
    - A CalEITC\* recipient, or
    - An ITIN filer who made \$75,000 or less (total CA AGI);
  - » Live in California for more than half of the 2020 tax year;
  - » Be a California resident on the date payment is issued; AND
  - » Not be eligible to be claimed as a dependent.
- To qualify for the CalEITC, you must:
  - » Have taxable earned income up to \$30,000;
  - » Not use "married/RDP filing separately" if married or in a Registered Domestic Partnership; AND
  - » Meet all other qualifications
- For more information about when you will receive a payment, including estimated processing times, visit <https://www.ftb.ca.gov/help/time-frames/#/>.
- **Your GSS Amount:**





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On your 2020 tax return	Stimulus amount
You are a CalEITC recipient	\$600
You: <ul style="list-style-type: none"><li>• Are a CalEITC recipient</li><li>• File with an ITIN; and</li><li>• Made \$75,000 or less (total CA AGI)</li></ul>	\$1,200
You are not a CalEITC recipient, but you: <ul style="list-style-type: none"><li>• File with an ITIN, and</li><li>• Made \$75,000 or less (total CA AGI)</li></ul>	\$600
You file a joint return, and: <ul style="list-style-type: none"><li>• At least one of you files with an ITIN</li><li>• Made \$75,000 or less (total CA AGI)</li></ul>	\$600
You file a joint return, and: <ul style="list-style-type: none"><li>• You are a CalEITC recipient</li><li>• At least one of you files with an ITIN</li><li>• Made \$75,000 or less (total CA AGI)</li></ul>	\$1,200

- If you qualify, or think you may qualify, for the Golden State stimulus payment you need to file your 2020 state tax return. If you qualify for CalEITC, make sure you claim it on your return.
- Visit [Help with Golden State Stimulus](#) for more information, including frequent issues such as:
  - » You believe you qualify but haven't received a payment
  - » How to return a payment you received in error
  - » Stimulus payments
  - » What to do if you moved
- Note that, in May 2021, the California Governor proposed a second round of Golden State Stimulus payments, but this has not been approved yet, and additional funds are not currently available. Please visit <https://www.gov.ca.gov/2021/05/10/california-roars-back-governor-newsom-announces-largest-state-tax-rebate-in-american-history/>.



## 2. GOLDEN STATE GRANT PROGRAM (“GSG”)

- The GSG provides:
  - » A one-time \$600 payment to all eligible CalWORKs Assistance Units. Note that this is a \$600 payment per assistance unit and not per individual in a household.
  - » A one-time \$600 payment (“Supplemental SSP Payment”) to all eligible SSI/SSP and CAPI benefit recipients.
- The GSG will be sent automatically to qualifying households who had an active CalWORKs case on March 27, 2021. Payments will be issued in the same way as your monthly CalWORKs payments, for most clients this is through EBT or direct deposit.
- **GSG payments do not impact your CalWORKs or CalFresh eligibility or monthly benefits!**
- GSG Payments were being automatically mailed out based on zip code beginning June 2021.
- For more information:
  - » Refer to the [GSG Payment page](#); [SSP Payment FAQs](#); [SSP Payment FAQs Spanish](#).
  - » If you are an SSI or CAPI recipient and did not receive this payment, or for any other questions, you can call **(866) 312-3100**.



## **COVID-19 Economic Impact Payments Fraud Alert**

**There is a risk of fraud connected to Economic Impact Payments. Be careful!**

Here are some important tips:

- The IRS will not call or email you to ask for any personal information or bank account information related to the Economic Impact Payment.
- Do not give this kind of personal information to anyone who calls you or emails you for it.
- The IRS will never threaten you or ask for important information by email.
- You do not need to pay anything to get the Economic Impact Payment. If you need help, there are free service providers who can help.
- The IRS won't tell you to deposit your Economic Impact Payment then send them money back because they paid you more than they owed you. That's a fake check scam.

If you receive an unsolicited email, text, or social media attempt that appears to be from the IRS or an organization associated with the IRS, like the Department of the Treasury Electronic Federal Tax Payment System, notify the IRS at [phishing@irs.gov](mailto:phishing@irs.gov).

If you are a victim of a COVID-19 scam, report it to the Department of Justice's National Center for Disaster Fraud (NCDF) at 866-720-5721 or [submit an online complaint](#). IRS-related scams, including fraud or theft of Economic Impact Payments, should also be [reported to the Treasury Inspector General for Tax Administration \(TIGTA\)](#).

**For more information, please visit:**

- Federal Trade Commission ("FTC") Coronavirus Scams web page at <https://www.consumer.ftc.gov/features/coronavirus-scams-what-ftc-doing>
- Social Security Association ("SSA") blog at <https://blog.ssa.gov/inspector-general-warns-about-new-social-security-benefit-suspension-scam/>



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- Office of the Inspector General (“OIG”) website at <https://oig.ssa.gov/newsroom/news-releases/march20-advisory>
- Internal Revenue Service (“IRS”) website at <https://www.irs.gov/compliance/criminal-investigation/irs-warns-about-covid-19-economic-impact-payment-fraud>



## **COVID-19 Economic Impact Payments Frequently Asked Questions (FAQ)**

### **How can I get help filing a tax return so I can claim my “Recovery Rebate Credit”?**

- You can get free high quality tax assistance from a number of organizations. You do not need to pay for tax assistance to file your tax return.
- Below are organizations offering free high quality tax assistance to low-income individuals. Please note that most of these organizations will require you to make an appointment, and will also ask you for identification, your Social Security number, and any recent tax documents:
  - **Volunteer Income Tax Assistance (“VITA”)** - To find the free VITA site closest to you, visit <https://irs.treasury.gov/freetaxprep/> or call (800) 906-9887.
  - **United Way of the Bay Area** – <https://earnitkeepitsaveit.org/> or call 2-1-1.
  - **Chinese Newcomers Service Center** - Call (415) 421-2111 to make an appointment to drop off your documents at their office in San Francisco. Visit <https://chinesenewcomers.org/en/volunteer-income-tax-assistance-program-vita/> for more information.

### **How will I get the Economic Impact Payment?**

- You should have received your Stimulus Payment(s) in the same form that your government benefits or tax refund usually comes - either deposited directly into your bank account, deposited directly into your Direct Express card, or by check or debit card mailed to the mailing address you most recently provided to the IRS.

### **I don’t have a permanent address—What should I do?**

- If you have a safe address, such as a non-profit organization, social services office, or community center, where you can have important mail sent, you can use that address with the organization’s permission. You may also choose to use a friend or family member’s address if that address is safe for you to access mail.
- You can also use a General Delivery address, and have your mail sent to your local





post office. Please note you will need photo ID to pick up your mail from the post office. Visit <https://faq.usps.com/s/article/What-is-General-Delivery> or [https://sf-homeless.wikia.org/wiki/General Delivery - U.S. Post Office](https://sf-homeless.wikia.org/wiki/General_Delivery_-_U.S._Post_Office) for more information.

- You may prefer to set up a bank account if you do not have a safe mailing address, and have your payment(s) directly deposited into your account.

## **I don't have access to a computer or internet—What should I do?**

- You can use a free public computer at a public library. Visit <https://aclibrary.org/welcome-back%e2%80%af/> for information about new limited visiting times available at many local libraries.

## **How can I check the status of my Economic Impact Payment?**

- To check the status of your **third Economic Impact Payment**, you can use the IRS's Get My Payment tool by entering your information at <https://www.irs.gov/coronavirus/get-mypayment> to get a status update. It is not currently possible to check the status of your first or second payments this way.
- To check the status of your **Recovery Rebate Credit** after you file your tax return or use the IRS Non-Filer Portal, you can use the IRS Get Your Refund Status tool by entering your information (including the exact amount of refund/credit claimed on your tax return) at <https://sa.www4.irs.gov/irfof/lang/en/irfofgetstatus.jsp>.
- You can call the IRS Economic Impact Payment help line at (800) 919-9835 and ask to speak with an Analyst who can provide “specific case information.” You may have to wait at least 30 minutes to speak with an Analyst, and you will need to verify your identity (including name, Social Security Number, phone number, tax information) with the Analyst.

## **Do individuals who are or were incarcerated still qualify for an Economic Impact Payment?**

- Yes, incarcerated individuals may still qualify for Economic Impact Payment(s) and/or Recovery Rebate Credit(s) if they meet the other eligibility criteria.
- Please note that you may be able to use your facility's address as your mailing address when you file a 2020 tax return or file online at the IRS Non-Filer Portal.
- If you are or were incarcerated and did not get your Stimulus Payments, please con-



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tact a free tax assistance organization to determine your eligibility and to file a 2020 tax return or to use the IRS Non-Filer Portal. [Please see the Tax Assistance Organizations section](#) for more information about free tax assistance.

- If you are denied an Economic Impact Payment or Recovery Rebate Credit, and you think it is because you were or are incarcerated, or if you got a lower amount because your spouse or dependent was incarcerated, or if the facility where you were incarcerated returned your payment to the IRS instead of giving it to you, please reach out to your Bay Area Legal Aid representative, or call the Legal Advice Hotline at (800) 551- 5554.
- Please be aware that you may receive a letter from the IRS after submitting your 2020 tax return asking you to verify your identity. If you are incarcerated when you received this letter, your facility is required to help you submit the appropriate information to the IRS. Information about how a jail or prison can help you respond to an IRS letter can be found at <https://caresactprisoncase.org/irs-update-to-prison-officials-re-letter-4883c-5071c-6330c-or-6331c-received-by-incarcerated-persons/>.

## **Will the Economic Impact Payment(s) or Recovery Rebate Credit reduce my cash aid (like GA, SSI, CalWORKs, etc.), school meals, WIC, Medi-Cal or CalFresh?**

- No - as long as you spend the Economic Impact Payment check in 12 months.
  - (Note that this might not be true for San Francisco General Assistance recipients. Please contact your Bay Area Legal Aid representative if you live in San Francisco and have had your GA benefits impacted.)
  - The payments are not considered a resource for 12 months.
  - The payments are not counted as income.

## **I owe money—Will the IRS take that out of my Economic Impact Payment?**

- The IRS was only allowed to take out from your first Economic Impact Payment if you owed child support greater than \$150.
- The IRS is not allowed to take out any of your second or third Economic Impact Payment if you owed child support, or for any other debt.



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- However, if you did not get the full amount of your Economic Impact Payment(s) and need to file a tax return to request a Recovery Rebate Credit, it is important to note that the IRS is currently permitted to offset the Recovery Rebate Credit for any debts that you owe. [Please see the Tax Assistance Organizations section](#) for more information about free tax assistance.
- Please also see **I didn't get my Economic Impact Payment(s) or dependent amount(s) and need to file a tax return - will my Recovery Rebate Credit be the same amount as the Economic Impact Payment and dependent amounts?** (above) for more details.
- Be careful of private creditors who may try to garnish payments from your bank account that you owe on outstanding court judgments. If you are concerned about a debt collector coming after your Economic Impact Payment for unpaid judgments, please contact the court to see if there is an outstanding writ of execution for the judgment, or call our Legal Advice Line at 1-800-551-5554.
- If you have any questions or concerns about a person or entity trying to take part of your Economic Impact Payment for a prior loan, please contact our Legal Advice Line at 1-800-551-5554.

## **What do I do if I have a qualifying dependent but didn't get a check for them?**

- You should have received an additional amount with your first and second Economic Impact Payments for your dependent child(ren) under age 17 if you filed your 2018 or 2019 taxes claiming these dependent(s), received RSDI, SSI, VA or RRB, OR you registered your dependent child(ren) on the IRS Non-Filer registration website before September 30, 2020. You should have received an additional amount with your third Economic Impact Payment for your dependents of any age if you filed your taxes or receive certain public benefits.
- For more information about qualifying dependents, please visit [https://www.irs.gov/publications/p501#en\\_US\\_2020\\_publink1000220868](https://www.irs.gov/publications/p501#en_US_2020_publink1000220868).
- If you did not receive an additional amount for your dependent(s), you can still try to claim that amount as part of your "Recovery Rebate Credit" by filing a 2020 tax return. [Please see the Tax Assistance Organizations section](#) for more information about free tax assistance.



## **Can I get the additional amounts for dependents who I claimed that are over 17 years old?**

- For the first and second Economic Impact Payments, the additional payments per dependent were only available for qualifying dependents under age 17.
- For the third Economic Impact Payment, the additional payments per dependent were available for any qualifying dependent of any age.

## **What should I do if I was claimed as a dependent by someone else and now can't get the Economic Impact Payment?**

- Someone who was properly claimed as a dependent by someone else, or could have been properly claimed as a dependent by someone else, is not entitled to their own Economic Impact Payment.
- To determine whether you should have been claimed by another person as their dependent, you may want to seek out professional tax advice or assistance for support. [Please see the Tax Assistance Organizations section](#) for more information about free tax assistance. You can also get more information about qualifying dependents at [https://www.irs.gov/publications/p501#en\\_US\\_2020\\_publink1000220868](https://www.irs.gov/publications/p501#en_US_2020_publink1000220868).
- If you should not have been claimed as a dependent, you can claim the Recovery Rebate Credit by filing taxes for 2020. Note that you will need to file a paper return and that this would cause an audit of your return and the return of the person who claimed you as a dependent. If you have questions about this, please contact your Bay Area Legal Aid representative, or one of the organizations in the [Tax Assistance Organizations section](#).

## **I did not get my Economic Impact Payment—What should I do?**

- There are a number of reasons you may not have gotten your first and/or second Economic Impact Payment. Here are a few possibilities:
  - Someone else claimed you as a dependent;
  - You owe child support payments;
  - Someone else received your check and will not give it to you;
  - Your check was sent to an old mailing address or another address that you cannot access;



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- Your check was deposited into a bank account that you no longer have access to and/or
- Your payment was deposited to a direct express card that you do not have.
- Please contact your Bay Area Legal Aid representative directly, or call our Legal Advice Line at 1-800-551-5554.
- You can also reach out to Volunteer Income Tax Assistance (VITA) at <https://www.benefits.gov/benefit/1543> or <https://irs.treasury.gov/freetaxprep/> or by calling 1-800-906-9887, or to United Way of the Bay Area at <https://earnitkeep-itsaveit.org/> or by calling 2-1-1.
- The IRS Taxpayer Advocate may be able to assist you if you did not receive an Economic Impact Payment, or did not receive the correct amount, in the following limited situations:
  - Non-Filer who claimed a dependent but did not receive the portion of the Economic Impact Payment for their dependents;
  - Eligible individuals who filed for an “Injured Spouse Allocation” but did not receive an Economic Impact Payment;
  - Individuals whose Economic Impact Payment was based on a 2018 or 2019 tax return but an IRS adjustment negatively impacted the amount of the person’s Economic Impact Payment;
  - Victims of identity theft who did not get their Economic Impact Payment or did not get the right amount;
  - Individuals who did not get their Economic Impact Payment because they filed a joint return with a deceased or incarcerated spouse.
- If your case does not fit into one of the above categories for Taxpayer Advocate assistance, please note that the IRS has advised that it cannot currently correct or issue a payment. Therefore, you may need to claim additional amounts, or the full amount, of your Economic Impact Payment by filing a 2020 tax return and requesting a “Recovery Rebate Credit.” Make sure to keep the Notice 1444, Your Economic Impact Payment, that you will receive in the mail, so you can use it to claim any additional amounts when you file your tax return. [Please see the Tax Assistance Organizations section](#) for more information about free tax assistance.

## **I received my Economic Impact Payment by check, but it was**





## **lost, stolen, or destroyed—What should I do?**

- If you did not get your Economic Impact Payment, but your status on the IRS “Get My Payment” page shows your payment was issued, or you received an IRS Notice that your payment was sent, you can request a “Payment Trace” by completing [IRS Form 3911](#) (“Taxpayer Statement Regarding Refund”).
  - For more information about the timeline for when you should request a “Payment Trace”, please visit <https://www.irs.gov/coronavirus/economic-impact-payment-information-center>.
  - Make sure to keep the Notice 1444, Your Economic Impact Payment, that you will receive in the mail, so you can use it to claim any additional amounts when you file your tax return.
- To request a Payment Trace, you can call the IRS (800-919-9835) or submit an [IRS Form 3911](#) (“Taxpayer Statement Regarding Refund”) and:
  - Write “EIP” on the top of the form;
  - Complete Sections I, II and III;
  - Answer the refund questions as they relate to your Economic Impact Payment;
  - In Section I, Number 7, check the box for “Individual” as “Type of return” and enter “2020” as the tax period, and leave the “Date Filed” blank;
  - Mail or fax the form to the appropriate location listed at <https://www.irs.gov/coronavirus/economic-impact-payment-information-center>.
- You should hear back from the IRS after about 6 weeks.
- If you do not hear back from the IRS after 6 weeks, or if you are too close to the May 17, 2021 tax filing deadline to wait, you may need to file a 2020 tax return to claim your payments. [Please see the Tax Assistance Organizations section](#) for more information about free tax assistance.

## **I received a notice—either a mailed IRS Notice 1444 or a status update on the IRS website—stating that my Economic Impact Payment was issued, but I did not receive it. What should I do?**

- If you did not get your Economic Impact Payment, but your status on the IRS “Get My Payment” page shows your payment was issued, or you received an IRS Notice that your payment was sent, you can request a “Payment Trace” by completing [IRS Form](#)



## 3911 (“Taxpayer Statement Regarding Refund”).

- For more information about the timeline for when you should request a “Payment Trace”, please visit <https://www.irs.gov/coronavirus/economic-impact-payment-information-center>.
- To request a Payment Trace, you can call the IRS (800-919-9835) or submit an [IRS Form 3911](#) (“Taxpayer Statement Regarding Refund”) and:
  - Write “EIP” on the top of the form;
  - Complete Sections I, II and III;
  - Answer the refund questions as they relate to your Economic Impact Payment;
  - In Section I:
    - » Check the box for “Individual” as “Type of return”;
    - » Enter “2020” as the tax period; and
    - » Leave the “Date Filed” blank.
  - Mail or fax the form to the appropriate location listed at <https://www.irs.gov/coronavirus/economic-impact-payment-information-center>.
- You should hear back from the IRS after about 6-8 weeks. If you do not hear back from the IRS after 6-8 weeks, you may need to file a 2020 tax return to claim your payment. [Please see the Tax Assistance Organizations section](#) for more information about free tax assistance.

## **I received a notice from the IRS (Letter 5071C) stating I need to verify my identity in order to receive my Economic Impact Payment(s)/Recovery Rebate Credits. What should I do?**

- If you got a letter from the IRS (5071C), you need to give the IRS more information so they can verify your identity before sending you your payments. You can verify your identity by:
  - Verifying on the IRS Verification website - <https://sa.www4.irs.gov/ola/id-verify/>
  - Verifying by calling the IRS at (800) 830-5084 between 7am and 7pm. Note that wait times are long, so calling first thing at 7am may be the best time to be able to speak with an IRS representative.
  - Faxing the information requested to (855)277-503 and including the following doc-



uments:

- » The 5071C letter you received from the IRS;
  - » An unsigned copy of the tax return you filed (current year/prior year);
  - » An unsigned copy of a tax return from an earlier year(if you filed one);
  - » Any supporting documents for each return, like Forms W-2, Forms 1099, Schedule C, Schedule F, etc.; and
  - » Driver's license, State ID or Passport. If the refund is greater than \$3,000, then an additional form of ID is needed. The following documents may be used- Driver's license, State ID, Passport, Social Security Card, Tribal Membership Document, Car Title, Voter Registration Card. Mortgage Statement, Lease Agreement, Utility bill matching address on ID, Birth Certificate, School Records(Under 14 years of age).
  - » At least one document must be a photo ID and all copies must be legible. This process can take up to 16 weeks.
- If you are unable to verify your identity online or by phone, you can ask to schedule an appointment at your local IRS office to verify your identity in person.
- For all of these options, please note that you will be required to have the following documents with you to provide to the IRS for identity verification:
    - Your 5071C letter, 5747C letter, 5447C letter, or 6331C letter;
    - The income tax return (form 1040,1040-PR, 1040-NR, 1040-SR, etc.) for the year shown on the letter;
    - Any other prior year income tax return; and
    - Any supporting W-2's, 1099's, Schedule C, Schedule F, etc.
  - For more information, please visit <https://www.irs.gov/identity-theft-fraud-scams/identity-verification-for-irs-letter-recipients> and <https://www.irs.gov/individuals/understanding-your-letter-5071c-or-6331c>

## **I have a representative payee for my public benefits—How will that impact my receipt of an Economic Impact Payment?**

- If you have a representative payee, your Economic Impact Payment will be deposited directly into the account that is managed by your representative payee, or your representative payee will receive a check in the mail with your payment.



- **The Economic Impact Payment belongs to the Social Security or SSI beneficiary, and is not considered a Social Security or SSI benefit that requires management or oversight by a representative payee.**
- If your representative payee has withheld or misused your Economic Impact Payment, you may also contact us at [www.baylegal/eip](http://www.baylegal/eip) or call our Legal Advice Line at 800-551-5554 for additional assistance.
- For more information and frequently asked questions about representative payees, please visit: [https://www.ssa.gov/coronavirus/?utm\\_content=pressrelease&utm\\_medium=email&utm\\_source=govdelivery](https://www.ssa.gov/coronavirus/?utm_content=pressrelease&utm_medium=email&utm_source=govdelivery)

## **I am a representative payee—What do I need to know about Economic Impact Payments?**

Information below is cited from the Social Security Administration website. BayLegal will make every effort to keep this information current, but we suggest also checking the SSA update page at <https://www.ssa.gov/coronavirus/>.

- **Will the Economic Impact Payment (EIP) be deposited directly into the account managed by the representative payee?**
  - In certain situations, the Internal Revenue Service (IRS) may deposit a Social Security or SSI beneficiary's EIP into an account managed by the representative payee, or the representative payee will receive a check.
- **How should a representative payee use a beneficiary's Economic Impact Payment (EIP)?**
  - The EIP belongs to the Social Security or SSI beneficiary. It is not a Social Security or SSI benefit. A representative payee should discuss the EIP with the beneficiary. If the beneficiary wants to use the EIP independently, the representative payee should provide the EIP to the beneficiary. If the beneficiary asks the representative payee for assistance in using the EIP in a specific manner or saving it, the representative payee can provide that assistance outside the role of a representative payee.
- **What responsibilities does the representative payee have in managing the beneficiary's Economic Impact Payment (EIP)?**
  - Under the Social Security Act, a representative payee is only responsible for man-



aging Social Security or SSI benefits. An EIP is not such a benefit. A representative payee should discuss the EIP with the beneficiary. If the beneficiary wants to use the EIP independently, the representative payee should provide the EIP to the beneficiary. If the beneficiary asks the representative payee for assistance in using the EIP in a specific manner or saving it, the representative payee can provide that assistance outside the role of a representative payee.

- **How should representative payees account for the Economic Impact Payment (EIP) when completing the annual Representative Payee Report (i.e., annual accounting form)?**
  - Because an EIP is not a Social Security or SSI benefit, representative payees are not required to account for the EIP when they complete their annual accounting form.
- **What if a beneficiary alleges a representative payee misused the Economic Impact Payment (EIP)?**
  - Because an EIP is not a Social Security or SSI benefit, SSA does not have authority to investigate or determine whether the EIP has been misused. However, if SSA receives an allegation that the EIP was not used on behalf of the beneficiary, SSA may decide to investigate for possible misuse of the beneficiary's Social Security or SSI benefit payments. SSA may also determine the representative payee is no longer suitable and appoint a new representative payee.

## **Will the Economic Impact Payments affect my immigration status?**

- No. The Economic Income Payments available to anyone with a Social Security Number valid for employment and it is not subject to the public charge rules. Receipt of the EIP will not cause you to be considered a public charge and will not prevent you from receiving permanent residency (your “green card”) or from becoming a citizen.





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