

# TAX INFRASTRUCTURE PROGRAM: AWESOME THINGS

## YOUTH EXPERIENCING HOMELESSNESS CLINICS

Traveling across the state to support young adults as they prepare their tax returns.

**Objective:** Show youth how to login to IRS-approved software to prepare and file their own tax returns and get withholding back and other refundable credits. Assist with obtaining social security cards, birth certificates and documentation needed to complete prior year returns.

**Outcomes:**

- Bend, Hillsboro, Beaverton, Portland (NAYA) so far.
- Refunds to date range from \$488 to \$11,079.

## HIGH SCHOOL DO-IT-YOURSELF TAX CLINICS

Pilot program provides grants to school districts for teacher stipend (\$3000 for one teacher, and \$2000 each for more than one teacher) to support running Do It Yourself Tax Clinics at high schools.

**Objective:** Students prepare their own taxes on IRS-approved software in facilitated, supportive environment to get their withholding refunded to them. The hope is that they will then share their success with their friends and family resulting in additional tax returns filed with refunds of withholding and credits to those additional filers.

**Teachers:**

- Offer DIY Tax Clinics at the high school for students after school and on weekends.
- Advertise clinics with fliers and announcements.
- Provide snacks and beverages and other incentives to students using stipend funds.
- Facilitate as students prepare their own tax returns.
- Train students in their personal finance classes to be co-facilitators at clinics.
- Offer education and answer questions about tax requirements.
- Assist students with navigating the DOR website for ID verification once students receive new-filer letter from DOR several weeks after filing.
- Provide referrals for families looking for free tax preparation sites in their area.
- Support students exploring tax preparation as a career by connecting them to volunteer opportunities at local VITA tax preparation sites.

**Outcomes:**

- 13 teachers at 8 high schools.
- Jefferson (PPS), Centennial, Mapleton, Dallas, McKay (Salem-Keizer), West Albany, Bend.
- Large and small schools in urban, suburban and rural districts, all with at least 30% free and reduced-price lunch eligible students.
- Refunds to date range from \$188 to \$1246.

## SPANISH-LANGUAGE VIRTUAL FILING PARTNERSHIP PILOT

Curated virtual tax filing pilot partnership between CASHOregon in Portland and Centro de Servicios Para Campesinos (Centro) in Woodburn.

**Objective:** Connect virtual tax filing platform and expertise of CASHOregon with community connections, Spanish translation expertise, trained staff and optimal site location of Centro to facilitate tax preparation for Latino community in and around Woodburn.

### **CASHOregon:**

- Provides training to allow Centro staff to verify ID of taxpayer, allowing the taxpayer to jump straight to the intake step.
- Provides Centro with exclusive dates and times for intake and return review appointments. This allows clients and Centro staff to participate together without waiting and eliminates the need for return reviewers to call repeatedly trying to reach the client or ensure there is a Spanish language translator for the appointment.
- Offers all appointments via Zoom, rather than telephone, allowing both the client and Centro staff to participate, giving everyone the opportunity to view the tax return on the screen as it is explained, and ensuring all parties get visual and verbal confirmation of understanding prior to completing the appointment.

### **Centro:**

- Validates ID of client, eliminating that step online, which can be confusing and time-consuming.
- Schedules clients for tax return intake and review on exclusive CASHOregon days for Centro.
- Ensures clients have all of their documentation prior to the intake appointment, ensuring a smooth intake process for both CASHOregon and the client.
- Provides Spanish translation as needed for both intake and return review appointments.

## POP-UP SPANISH-LANGUAGE VITA SITE PILOT

Oregon State University VITA staff bring expertise to Centro for periodic tax preparation days.

**Objective:** Stand up temporary tax preparation site at Centro in Woodburn to address lack of free assistance in the area and take advantage of Centro's community connections, Spanish translation capability, availability of local space and trained staff.

### **Oregon State University VITA program:**

- Provides six staff and one supervisor to prepare tax returns on designated days.
- Provides scheduling portal.
- Offers on-site certified ID authentication for individuals with new or renewing ITIN applications (only available for in-person filing).
- Offers Pop-Up sites during tax season and through the summer.

### **Centro:**

- Provides space, trained staff, translation services and customer service. Reminds clients of appointments and ensures they have the documents they need to bring. Assists taxpayers with any post-filing issues, including letters from the IRS or DOR.

## FREE TAX PREPARATION SITES

VITA organizations in Portland, Beaverton, Corvallis, Monmouth, Eugene, Bend, Newport, South Bend, Roseburg and Medford, along with the Warms Springs Community Action Team and the Confederated Tribes of Umatilla, providing free tax preparation, including prior year returns, to low-income families.

**Objective:** Improve and expand free tax preparation and tax navigation services provided by community organizations and tribal governments to low-income Oregonians.

**Outcomes:**

- Doubled the number of sites from 2023.
- Hired 60+ college student workers and paid interns to increase capacity. After 40 hours of training and 40 hours of work, students are eligible for additional 40 hours of free training (\$500 value) to meet requirement to take Certified Tax Preparer Exam and become certified tax preparers, a job in very high demand statewide.
- Tax return completions running at 12% above last year at this time (through 2/20). Aiming for 50% increase over 2023 to 15,000 returns completed by year end. (For context, there are an estimated 50,000 families, with about 80,000 children, eligible for the Oregon Kids Credit).