

# **Working Families Tax Credit Community Listening Session Report July 2023**

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## BACKGROUND

The 2021 Washington State Legislature passed ESHB 1297 which expands eligibility and funding for the Working Families Tax Credit (WFTC) program. This program is intended to support Washington's low-to-moderate income working families and individuals.

By 2023, the Working Families Tax Credit had become an established program administered by the Washington State Department of Revenue (DOR). DOR opened applications on February 1, 2023 for the 2022 tax year. It is estimated that up to 400,000 individuals or families are eligible for WFTC in its first year. To date, DOR has received over 180,457\* applications and has refunded over \$93.6 M\*.

In July 2023, the Department of Revenue hosted three virtual listening sessions for community members to share their experience with the Working Families Tax Credit program. During each session, community members were provided the opportunity to provide feedback on the following:

- What worked well when applying for the credit?
- What were some of the challenges applying for the credit?
- How did you communicate with DOR or get support when needed?
- What could DOR do to encourage and reach more potential applicants?
- How did you find out about the credit?

The input received will help drive changes to the overall WFTC program and guide processes in the future.

*\*Numbers to reflect through June 15, 2023*

## LISTENING SESSIONS APPROACH

Community member listening sessions were held via Zoom and included a facilitator, a host, two note-takers, and two Spanish interpreters. Each session covered the same questions.

Listening sessions were promoted through WFTC outreach and targeted email campaign.

During these sessions, community members were invited to provide their feedback, both verbally and via chat. These listening sessions were not recorded. For those unable to attend the listening sessions, a survey was also available that included the same questions and themes as shared in the listening sessions.

The listening sessions were held:

- Tuesday, July 11 at 1 p.m.
- Wednesday, July 12 at 10 a.m.
- Thursday, July 13 at 5:30 p.m.

Total attendees: 47

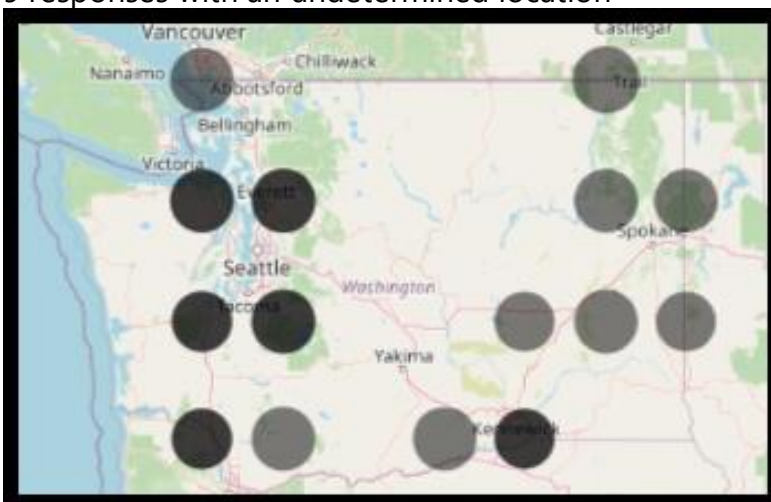
Attendance rate: 34%

Total comments collected: 480

## SURVEY RESPONSES

We received 53 survey submissions including:

- 38 responses from Washington
- 3 responses from Oregon
- 2 responses from Indiana
- 1 response from Colorado
- 9 responses with an undetermined location



*SURVEY RESPONDENT GEODATA LOCATIONS IN WASHINGTON*

## LISTENING SESSION ATTENDANCE

We had 47 participants in attendance across all three sessions from the following counties:

- Benton
- Chelan
- Clallam
- Clark
- King
- Mason
- Pierce
- Snohomish
- Spokane
- Thurston
- Walla Walla



*Listening session participants by county.*

## KEY FINDINGS

### APPLICATION PROCESS

#### *How easy was it to apply for the credit?*

##### Feedback themes

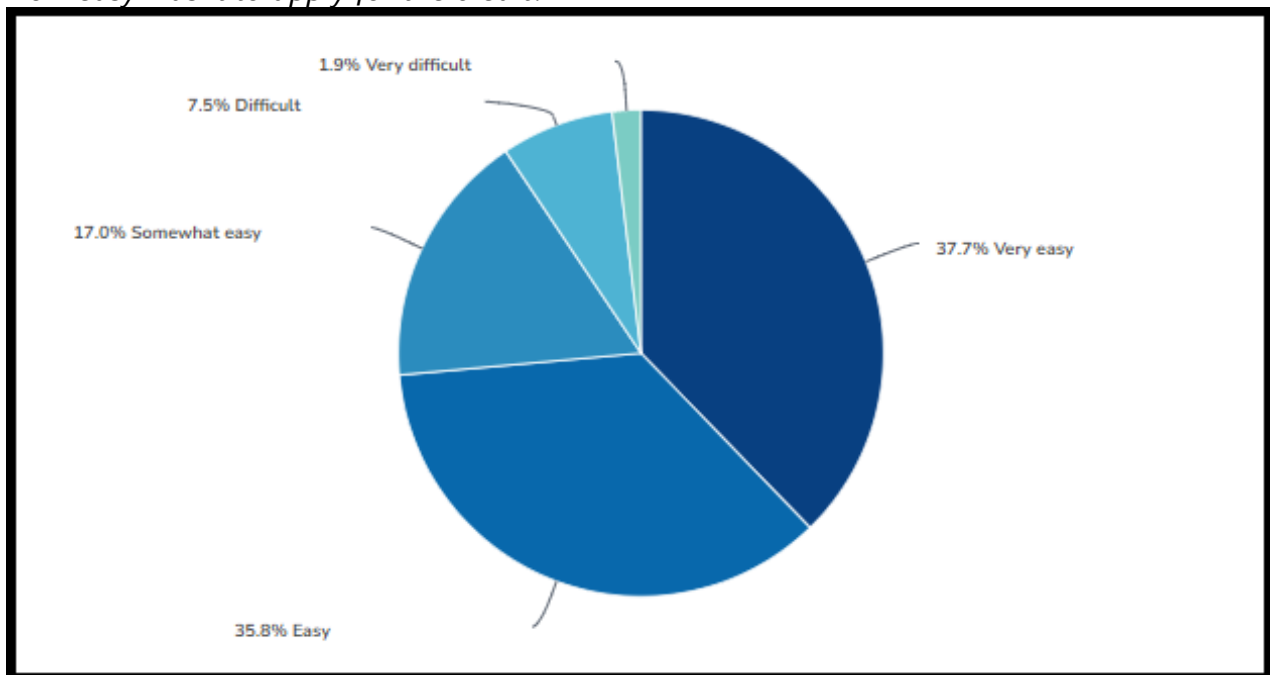
Respondents in both the listening session and the survey agree that the overall ease of applying for the credit was “easy”. Those respondents who filed via MeF software were more likely to give this question a higher “ease of applying” rating.

Noted challenges included:

- Difficulty knowing if one had already submitted application. Website doesn’t notify either way.
- Some EFL (English as foreign language) communities needed extra support.
- Paper application is lengthy and more difficult versus online application.

##### Survey responses

#### *How easy was it to apply for the credit?*



PERCENT BY EASE OF USE OF APPLYING.

## Listening session and survey comments

- Super easy +1
- Easy
- Easy using tax aide returns.
- Step by step evert step was defined.
- I liked the pre questions before officially applying.
- Unsure if an application was sent already so multiple application may have slowed down the process.
- I was happy how easy it was! I helped both my sisters apply before I applied and it was done quickly.
- Applying through a tax preparer was easy, applying via the paper application was very long and had to reenter taxpayer information that was already on the tax return.
- Some tax preparers also did not integrate the WFTC (like TurboTax) and some charged extra fees.
- For folks who got free tax prep help, it was very easy!
- Oh, good to know that there's a difference on applying for this! We applied online.
- Easy to apply with accounting experience. Filed online. Took less than 15 minutes (EN application).
- Has organizational input into WFTC program but applied herself and used tax preparers. Website didn't let her know she already applied.
- Did mostly outreach and found the hotline supported application assistance. Some people mentioned it was challenging. ES speaking communities w/ little skills in reading, writing, tech skills needed more support.
- Going through a tax preparer was easy, however, when applying through paper application was much more difficult. The application requires information that is already included in the tax return.
- It was easy to apply. (Except for the waiting for the payment.)
- Easy to apply (HR Block) very smooth (as tax professional and community member).
- Once available with tax return easy/quicker – separate application was longer.
- Consistent communication qualification requirements.
- Fue fácil pues trate de llevar todos los documentos que pedían y la agente me ayudo a llenar formatos. - *'It was easy because I tried to bring all documents they requested, and the agent helped me fill out the forms.'*
- Super easy to apply. The only issue I had was getting certain tax info from the previous year.
- Had to do my taxes first.
- The hardest part was finding the actual form to fill out.
- The application was too long and was hard for my clients to complete. There were also a lot of steps that were confusing because a lot of the information was already in the tax return. Also the Where's my Refund tool does not have any information about whether an application was accepted or denied, or where my check is. People have gotten used to using the IRS tool and were looking for the same thing with WFTC. The WFTC website doesn't provide easy navigation on the front page to information about how the Department will communicate with people if there is an issue with their application. This could be improved to increase transparency and trust. People are likely to disregard a letter from the Dept of Revenue due to fear, or due to not understanding why they are getting a letter especially if they applied with a tax preparer and weren't aware they might receive follow-up. The "What to Expect after I receive my Refund" FAQ

should be more prominently placed on the front page of the website, not listed at the bottom of the Where's My Refund tool.

- It just takes so long to get I mean shouldn't it go faster for people who use there SSI I can understand it taking longer for the ITIN but the ones that are already approved for the EIC should go faster you would think.
- Con dificultad para crear la cuenta. - *'Difficulty creating account.'*
- Information was not very clear, and had to hear about the credit from other people.
- Process was easy because of the WAISN operator that assisted them.
- Had an issue with their business and made the application process more confusing. Once it was sorted out, it was easy.
- Le dimos buen servicio. - *'You gave good service.'*
- Porque no entendía mucho de como llenar la aplicación. - *'Because I didn't understand much about how to fill out the application.'*
- En donde le ayudaron a llenar su aplicación (waisn) la persona que lo atendió le da un 10 porque le explico todo muy bien. - *'Where they helped you fill out your application (waisn) the person who attended you gives it a 10 because they explained everything very well.'*
- Al principio fue difícil porque no pida hacerlo, después llamó a waisn donde me ayudaran a llenar la aplicación y fue fácil para mi hacer la aplicación. - *'At first it was difficult because I didn't ask to do it, then he called waisn where they would help me fill out the application and it was easy for me to do the application.'*
- Porque le ayudaron bien. Waisn I me ayudo a llenar mi aplicación. - *'Because they helped you well. Waisn helped me fill out my application.'*
- Fue muy fácil porque Waisn me ayudaron a llenar la aplicación. - *'It was very easy because Waisn helped me fill out the application.'*
- Community member had a great experience applying for the credit through the phone with WAISN.
- Difficult because of lack of internet access and having issues with the email part of the application.
- Had all the documents ready, but needed assistance from people that knew how to fill out the form.



## ***What worked well when applying for the credit?***

### **Feedback themes**

Many responses in both the listening session and survey provided positive feedback that overall, it was easy to apply for the credit.

Common themed responses include:

- The process was quick and easy.
- The outreach team's efforts were helpful in both customer service and multi-lingual support/materials.
- Seamless integration with tax software.
- Community organizations (such as Washington Immigrant Solidarity Network (WAISN) were utilized and successful in assisting through the application process.

### **Listening session and survey comments**

- Having people out explaining what the credit was about and answered questions (people out in the community).
- Most returns were processed in 90 days for refunds.
- The outreach team did a good job providing multilingual outreach materials.
- The different languages were helpful! Expanding the languages in the future would be great.
- Kudos to Perla, targeted outreach and multi-lingual support.
- Same eligibility as earned income credit made easy to spot candidates.
- The call center's interpretation service worked well.
- On demand printed outreach materials in multiple languages was really helpful for community organizations. Would love for that to be continued into year two.
- Outreach – saw organizations promoting application assistance and WFTC. Working with organizations who have established trust in community help the community be receptive.
- We appreciated the outreach materials in multiple languages as well - sent to faith communities around the state.
- Really well with prepackaged tax prep integrated and prompted with software.
- Having us members of the community spreading the word about this.
- *Llevarmis documentos relacionados con ITIN Y la atención al cliente que me brindaron. - 'Take my documents related to ITIN AND the customer service they gave me.'*
- Making sure I had all information ready.
- It was quick and online.
- ALL WORKED WELL.
- Application was simple, the only surprise we encountered was needing to have submitted our 2022 tax return before being able to file for the working families tax credit.
- I didn't have to click through too many questions.
- The easiest way I have ever done any tax processing ever.
- It was linked to the tax software so it auto populated.
- The website was easy to follow.
- The application process was simple.

- The ease of online application was great!
- It was easy to understand.
- Nothing.
- Just reading the directions it was pretty self-explanatory.
- It was pretty self explanatory.
- The application process was very simple and easy to follow and understand.
- I used my cell phone to apply, and it was very very easy. So possibly even easier on a computer! Also, having all of the required info ready before starting the application.
- That I could fill it out with my regular taxes.
- Getting a clear answer.
- Easy steps for the application process and quick receiving time for funds.
- The application was easy to follow.
- Easily laid out steps.
- Good instructions.
- The integration with Tax Slayer.
- Not sure still waiting.
- It was an easy process to apply for but still haven't received my refund and I have called every few weeks after the 90days and I applied at the end of February.
- It was easy to submit.
- The outreach toolkit was great! It helped me to do outreach in English and Spanish. I also heard really good feedback from our partners about using the call center's interpretation.
- As far as I can recall, the application process was easy, especially since I was already had a SAW account.
- Que al instante sabía si era uno elejible. – *'That he instantly knew if he was eligible.'*
- The application process was very easy once they were considered eligible.
- The help was very welcomed and needed.
- WAISN operator assisting them made the application process easy.
- Todo funciona bien. – *'Everything worked fine.'*
- Si le funciona bien, le ayudo. – *'If it works for you, I help you.'*
- Waisn me ayudó a llenar la aplicacion y fue mas facil para mi el llenar la aplicación. – *'Waisn helped me fill out the application and it was easier for me to fill out the application.'*
- En la manera de que le ayudaron y que tenía todo a la mano para poder hacer su aplicación. – *'In the way that it helped him and that he had everything at hand to be able to make his application.'*
- Funcionó muy bien que alguien me ayudara a llenar la aplicacion. – *'It worked very well to have someone help me fill out the application.'*

## ***What was the biggest challenge applying for the credit?***

### **Feedback themes**

While many reported that they did not face any challenges applying for the credit, there were several responses in both the listening session and survey that shared common themes concerning challenges. Two common feedback themes were around ITIN applicant challenges (fear of government, costs such as requiring each child to have an ITIN, and fees charged by preparers) and “post application” frustrations (long wait times to receive the credit, “Where is My Refund” tool didn’t provide information etc.).

Feedback included:

- Miscommunication – contrasting information was being relayed by agency.
- The name “Working *FAMILIES* Tax Credit” discouraged single people or people without children from applying.
- Fees and costs associated with applying, especially for ITIN filers.
- Misunderstandings around qualifying children criteria.

### **Listening session and survey comments**

- It would be helpful if DOR could provide a form on the website, you can fill out to order paper applications or printed outreach materials.
- Checking the status, especially for self-employment, I still can't figure that out.
- ITINs were harder to determine eligibility.
- Fees and costs with tax preparers was discouraging to apply especially with ITIN.
- Helping people feel comfortable – folks who don't interact with IRS and fear of government or someone coming after them.
- The processing time was inconsistent and long that there was some confusion of the credibility of the program.
- Long wait times to receive the credit caused confusion, and decreased trust. The changing timelines were unclear and made a lot of people feel they needed to submit applications more than once b/c they were getting mis information.
- Folks without ITIN did not want to apply for ITIN due to fear of government.
- Bank detail feeling uncomfortable providing info – submitting application processing time was unclear.
- What took us so long was getting tax papers from our tax preparer! Just time wasn't lining up to get the paperwork and so we just got our filled out last week!
- Free wrap around application services for ITIN filers needs to be prioritized to allow immigrant families to access this credit.
- Where's my refund tool was challenging - didn't provide detailed information...communications were all by mail. Mail not feasible for all applicants.
- Requiring each child to have an ITIN made the process expensive.
- Also +1 to the point about the application being pretty long and require you to re-enter a bunch of info from your tax return.
- People didn't qualify even with a lot of dependents. Helping the ITIN filers was challenging. Didn't know if they did it right.

- Miscommunication. Different information being relayed from agency and processing time wasn't consistent. This discourages trust and makes people not want to apply.
- ITIN for every person in the family (children) was a barrier.
- I got similar feedback. People talked to the call center and heard their application was good to go and then would receive a letter in the mail saying they needed to amend or fix an issue, even though they had already called in and fixed it. Another issue was the ITIN and the costs. People would be charged up to \$150 per ITIN application, making it not worth it to apply for the WFTC.
- I also heard people saying tax preparers told them their application would be faster or easier if they paid through Jackson Hewitt, for example.
- More language materials and events listed on main page.
- Understanding wait time. Others received it faster.
- Advertisement on TV but not what the eligibility requirements. Had to go through application to determine whether she and others apply.
- There were many people who were just a few hundred dollars over the income limit and as much as the cost of living is I feel that maybe we might want to try and raise the income limit.
- The word family made single people or people without children not even attempt it.
- Not all taxpayers were aware of this tax credit.
- Procedure: enter child's name and social security number again. Copy and paste like 9 different times. Auto-populate with federal tax return – and the rules for children (qualifying).
- Single youth that were not eligible to apply.
- El saber si los documentos que yo llevaba eran los correctos. – *'Knowing if the documents I was carrying were correct.'*
- Nothing really.
- Not knowing when the money would be available.
- NO CHALLENGES
- Waiting to finish our 2022 tax filing before submitting the tax credit application.
- None +2
- I didn't qualify, even though my income is low enough, because I am retired.
- I did not come to any challenges.
- My income - a few dollars makes a difference.
- The post-application process has been my issue.
- There wasn't one.
- Income
- None
- I didn't have any challenges that I can remember.
- I had no challenges when applying.
- None really. The only issue was a personal one in the fact that I do not have internet where I live, and spotty cellphone reception, so it made it take a little longer to load is all.
- N/a
- Actually seeing the finds.
- I didn't have any issues.
- When I did the pre-qualifying test, it said I qualified but when I filled out the actual paperwork, I did not. I know we are in a unique situation since we have a disabled adult child who does work but is not able to live on his own. He qualifies as a dependent for the IRS but did not for this tax credit.
- I didn't receive any information afterward and we haven't received my payments.

- Finding out of my children, who are claimed on my ex-husband's tax return, could be claimed by me for this tax refund.
- Getting confirmation about my app process.
- Application was easy but when I checked back on my credit; the application could not be found.
- n/a
- The numerous demographic questions were overwhelming. Also, the fact that children had to be "added" rather than the tax program already adding the children is an unnecessary step.
- None
- There wasn't any challenges when applying for it. It has been challenging receiving my refund as I still haven't received it and it's been well over the 90days I applied the end of February and haven't called every few weeks since after the 90 days to just get told that they are getting through them as fast as possible and if there is a problem I will receive something in the mail which I still haven't ever received anything in the mail and have been told nothing has been sent to me in the mail either.
- No response... It takes forever to get. I still haven't received it I turned it in In March. It's now July.
- I was concerned that some clients were paying fees to paid tax preparers to apply, which is a problem. I'd like to see more free tax preparation services available across the state - in some places its easy to find but not as easy in others. This will help more people access the credit. Also, there were issues with a few people who received paper checks and were not able to cash them. It would be better to have low-fee debit card option for folks to receive their credit if they don't have an account. Last, it was confusing for folks who wanted to apply for an ITIN. More services to help people file for the credit and apply for an ITIN at the same time would be really helpful. Requiring each child to have an ITIN is also a barrier, as it can be really expensive to do the application for each child. Its not worth it for many families because of this cost.
- 7 months is a bit of a stretch on the memory but looking up the status of the refund was the most challenging - figuring out which site to use and the status was generic and didn't seem to provide a firm confirmation of receipt.
- A lot of people made a few hundred over.
- El mayor desafío fue tener la edad para solicitar el crédito. – *'The biggest challenge was being old enough to apply for the loan.'*
- Community member had an issue with owing back taxes, and did not know where to get information about how that would effect applying for the credit.
- Community member was worried about this being a public charge.
- N/a
- Nada mas que entrara la llamada para poder aplicar al programa. – *'Nothing more than the call will enter to be able to apply to the program.'*

## ***What method(s) of applying did you use?***

### **Feedback themes**

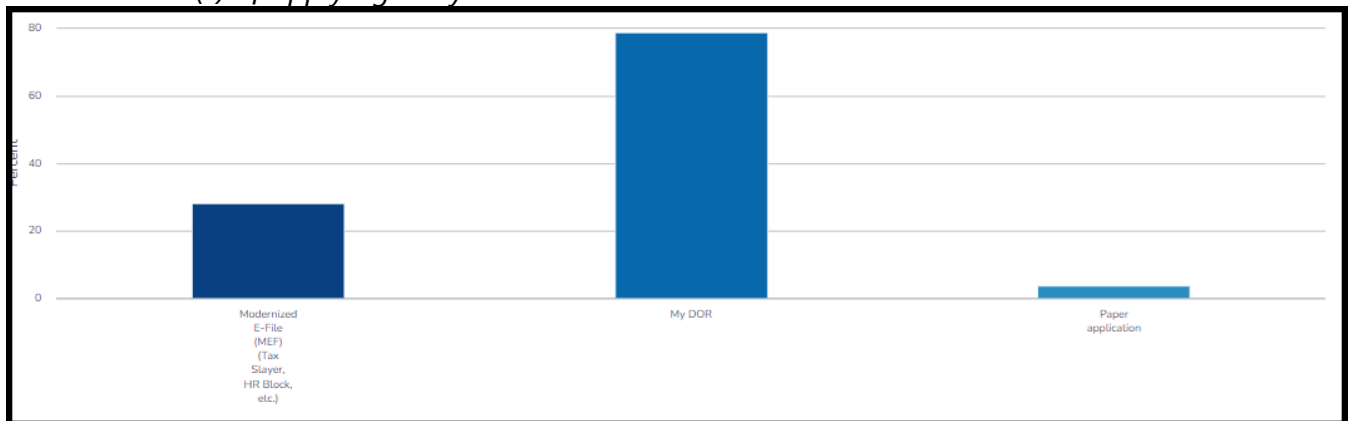
Survey data shows that the majority of applications were submitted by respondents via Working Families website/My DOR.

Challenges included:

- Difficulty in getting PDF copy of return.
- Further clarification on eligibility requirements needed.
- Potential applicants uncertain whether WFTC is legit.

### **Survey responses**

*What method(s) of applying did you use?*



PERCENT BY METHOD USED TO APPLY.

### **Listening session and survey comments**

- Wasn't aware that the tax app showed the refund for this particular fund! Great info.
- Tax preparer software. When helping people who had already filed their tax return, but had not filled out their WFTC application at the same time, paper application was easier b/c most people did not have a PDF version of their paper copy, but that meant a lot of extra work ultimately.
- Tax preparer software
- Tax aide software
- DOR website directly. Quick books provided link to website.
- Helping others with VITA site in King County. This was seamless. Folks who paid elsewhere wanted reassurance WFTC was legit and came for help. Hard to get copy of return in pdf form.
- Helped 2 people with taxes: 1 with tax return software and 1 online application. The tax return requirement was well advertised. Online application separation was more involved – easier to do it at the same time. Clarify eligibility requirements.
- We need to have little tik toks or ads maybe flyers and posters of "LOOK what I GOT last year from the WFTC" does that make since? -so people believe it.

## WORKING WITH THE DEPARTMENT OF REVENUE

### ***When you needed information-how did you communicate with DOR or get support?***

#### **Feedback themes**

The feedback from both the surveys and listening sessions was consistent between participants contacting DOR via phone or online (either searching through website or through My DOR directly). Many respondents also mentioned that they utilized community organizations for support. Multiple participants noted that they didn't reach out to DOR at all, either because they didn't need to, or they reached out to other resources instead.

#### **Listening session and survey comments**

- Use Where's My Refund tool to get more detailed information – not have to pick up.
- DOR google drive--responses were prompt.
- Used phone help line.
- I didn't know you had a messaging feature!
- DOR Regional Outreach coordinators were also helpful.
- Call center versus message in mail or between calls reps. Overall, very helpful.
- Reached out to community-based organizations for help. Didn't reach out to DOR.
- Mail. Would have been nice to have email confirmation that application was received. Where is my Refund tool had problems.
- Perla is a superstar and was my go-to when partners had questions.
- Call – center communication was not consistent. (Miscommunication amongst teams).
- On-line
- Having a phone number is not necessarily my preferred method, I go online and then via email if necessary.
- I usually called [specific content] or emailed or reach out to my network of others.
- I got information from my early learning center.
- Asked questions at the monthly meeting.
- Por internet – 'By internet'
- I didn't need to.
- N/A
- I DIDN'T HAVE TO YET...
- Through the messaging feature on DOR login.
- None
- Did my research.
- N/a
- I just read over the information given on the website.
- n/a
- I called to see if my application had been received. They were helpful!
- Online.
- Haven't

- Called the 1800 number that was listed on the website.
- I didn't need to. +1
- My dor portal
- No
- I didn't have any issues.
- Search high and low online.
- Phone, messenger
- The "where is my credit" tool could not find my application.
- Email
- Call
- I called the number and talked to someone.
- I had to call them.
- When the refund didn't arrive when expected, I emailed support at DORWFTC@dor.wa.gov. The response was promptly and courteously returned by Rosemary, the next day.
- Sonja from WSA.
- No
- Community member tried to call DOR, but they were not able to connect with anyone.
- Community member did not communicate with DOR, but they felt more comfortable contacting WAISN for information.
- Community member did not communicate with DOR, and felt more comfortable contacting WAISN.
- Recibio ayuda con Waisn, donde le ayudaron a llenar su aplicación. – *'He received help with Waisn, where they helped him fill out his application.'*
- Recibio ayuda y la informacion con la ayuda de waisn pude hacer mi aplicacion. – *'I received help and information with the help of waisn I was able to make my application.'*
- Pidió ayuda a waisn para llenar su aplicación. – *'He asked waisn for help to fill out his application.'*
- Lo escuche en el radio y llamó al número de waisn donde me ayudaron a llenar mi aplicación. – *'I heard it on the radio and called the waisn number where they helped me fill out my application.'*
- Yo busque informacion y ayuda en otro lado pero le cobraban mucho dinero por hacer la aplicación. Yo me entere en facebook que waisn estaba haciendo la aplicación y que no estaban cobrando. – *'I looked for information and help elsewhere but they charged a lot of money to make the application. I found out on facebook that waisn was making the application and that they were not charging.'*
- Pedi ayuda solamente a waisn, donde me ayudaran a llenar mi aplicación. – *'I only asked waisn for help, where they would help me fill out my application.'*
- Mire en internet y de ahí saque el número de Waisn para que me ayudaran a llenar la aplicación. – *'I looked on the internet and got Waisn's number from there so they could help me fill out the application.'*



## ***What could DOR do to encourage and reach more potential applicants?***

### **Feedback themes**

A large variety of recommendations were provided in response to DOR reaching more potential applicants.

Recommendations included:

- Continue advertising via social media and outreach and collaborate with agencies that work and have established trust with folks and families.
- Promote through early learning centers and schools.
- Make more resources available to support ITIN filers.

### **Listening session and survey comment samples**

- More free tax prep and ITIN support throughout the year and in more locales would be great!
- Simplify the I didn't see any training classes offered.
- Great materials. However, tribal presence missing and requested more Native American representation in materials.
- Where can I get more flyers for my tribal community?
- Notifying the applicant that they have already applied to avoid multiple application that caused delay.
- More paid advertising would be awesome too!
- Keep reaching out to people.
- Where does the 400k estimate come from? Is it from WA EIC data?
- Simplify the application and transparently communication about the timelines for receiving refunds.
- Integrating into all third-party tax prep software (like TurboTax), advocating to remove fees for WFTC apps, and collaborating with other agencies that eligible folks interact with for other benefits.
- Let schools and teachers to know more about the credit.
- Eligibility criteria needs to be flexible.
- Simplify the application. Applications that are short and easy to fill out will help make this program more equitable and ensure that eligible families do not continue to miss out.
- Expand efforts around tax software availability.
- Collaborate with agencies that already work with folks/families.
- Continue to do outreach and events partnering with agencies that already have trust with people. Social media, email blast, etc. and include Spanish to promote this credit.
- I think it would be great to have more language access too —hiring outreach workers to speak more languages outside of Spanish & Vietnamese.
- As shared earlier, we would like to see more language materials could be useful from the main website.
- It will be great if more events can be organized and made available and be listed on the main page. Thanks.

- Out of those applied what is the ethnic makeup? What targeted outreach can be developed to reach out to more community members? [DOR - haven't compiled this data yet; however only approx. 40% complete demographic questions].
- Non-English speakers had trouble filing taxes. Tax assistance would help.
- Partner with HR Block, TurboTax, Liberty, Jackson Hewitt, AARP Tax Aide having them materials to share.
- Get advertising and information out to schools and early learning centers. I did not know about this until joining parent ambassadors.
- More advertising in Spanish and ensure clear communications. Use news and radio and be more clear.
- Acercarse a las comunidades con agentes que expliquen de que se trata el servicio y orienten sobre que documentos se necesitan. – *'Approach the communities with agents who explain what the service is about and provide guidance on what documents are needed.'*
- They did fine in my opinion.
- Connect with more ethnic media outlets, especially ones focused on families like Look, Listen and Learn TV ([looklistenandlearn.org](http://looklistenandlearn.org)).
- JUST KEEP ADVERTIZING IT...
- I still have not received a response or a tax credit after filing on 02/11/2023.
- N/a
- I think they did a great job of getting the message out there.
- Not sure
- Make low-income retirees able to get the credit. They really need the help.
- Make it seen more before its time to apply.
- I don't know.
- Expedite the payment process & keep people better informed as to where they are in the process.
- Increase the amount of people who are able to apply. I didn't qualify because I was just a few thousand away from the threshold. Even if you just gave those who are close to the previous max amount earned give a discounted credit or something.
- Post flyers and put it out there more so everybody that is able to apply does.
- Put the information out there right from the start so that people will know about it.
- Advertising
- More advertising and social media.
- More widespread info on multiple platforms to inform Washington workers of the program.
- You did great! Just continue next year and word week get out.
- Stop making it so difficult to navigate...the website is trash and has a terrible ui and flow.
- Not sure. i received email. i saw flyers at the library. i received a postcard in the mail.
- Advertise more and earlier to targeted populations. We have numerous clients that had not heard of the program.
- Not sure.
- I think they did well with letting people know about applying but would be better to get them processed faster and not say you will be processed and receive your refund within 90 days.
- Hire more people for staff. They are behind/very slow.
- Language access will continue to be important. Having outreach workers that speak more languages beyond Spanish and Vietnamese would be really helpful. Also, more opportunities to pair outreach with tax prep and application assistance (one stop events where people can get their entire application done), especially in rural areas with less services. DOR could collaborate more with other agencies to get information to folks who are already applying for other aid programs or services for eligible populations.
- If employers aren't already letting employees know, that may be a helpful route.

- Shirts and car decals.
- Que las preguntas sean mas facil de entender. – *'Make the questions easier to understand.'*
- Do more outreach because they had to rely on word of mouth.
- To give more information on how applying for the WFTC won't affect community members when trying to adjust their immigration status.
- Promote the application so that more people can be aware.
- Todo esta bien. Le parece todo muy bien. – *'Everything is fine. It all seems fine to you.'*
- No tengo idea. si les recomdaria para que hicieran el credito. – *'I have no idea. If I would recommend them to make the credit.'*
- Que le dieran mas propaganda y que la hagan mas fácil. – *'That they give it more publicity and that they make it easier.'*
- Mas propaganda. – *'More propaganda.'*
- Que pidan ayuda con Waisn porque ellos si ayudan bien y vale la pena porque explican bien. – *'Ask for help with Waisn because they do help well and it's worth it because they explain well.'*
- Dónde encontrar que ayuden hacer la aplicación gratis y paso a paso y hacer más propaganda. – *'Where to find that help make the application free and step by step and make more propaganda.'*
- Mandar mensajes para que apliquen para el crédito. Y que sirve la ayuda que dan. – *'Send messages to apply for credit. And what good is the help they give.'*

## GENERAL QUESTIONS

### *How did you find out about the credit?*

#### **Feedback themes**

There were many ways that preparers were informed about the credit.

Most frequently mentioned were:

- Social media
- Marketing and advertising (local news, flyers, etc.)
- Community-based organizations

#### **Listening session and survey comments**

- Facebook/social media
- From my Parent Ambassadors
- Tax aide training
- Noting also that I saw the flyers in the Chinatown-ID area
- Through community-based organizations. Then, quick books helped prompted.
- Ads on metro busses
- Working with a community organization. I found out from parents in the community that I represent. There was trust and support there. A lot of us Hispanics distrust government especially if we have an ITIN number.
- Newsblast/newletter and HR Block
- Washington State Association Head Start and ECEAP
- I saw an email that said "want to make some \$" so I read it lol -I read all their emails but really read that one.
- En la escuela de mi hijo le dieron el papel. – *'At my son's school they gave him the paper.'*
- Local news
- News article
- THROUGH TURBO TAX
- A friend
- Tax preparer
- Job put a flyer in the break room.
- Email
- DOR newsletter
- School
- My job told me.
- A billboard sign
- Facebook
- Online +1
- Emails
- TikTok
- I think I saw a link on the website I was using to file my tax return.
- Turbo Tax
- By accident

- Internet
- Turbo tax after my taxes were already filed.
- Through my tax software.
- Local news articles.
- N/a
- E-mail
- Article
- Postcard
- Turbo tax
- Online, emails as well as my tax preparer.
- It was everywhere on flyers on t.v.
- WABC presentation in 2022.
- Accidentally ran across it on the internet but now I'm not certain where.
- WSA parent ambassador
- Publicidad. – *'Advertising.'*
- From a friend.
- From WAISN.
- From a friend.
- Por amistades del trabajo. – *'Through work friends.'*
- Cuando hice las taxas me comentaron y despues de 4 meses lo hice. – *'When I did the taxes they told me and after 4 months I did it.'*
- Por medio de la escuela. – *'Through the school.'*
- Por la radio. – *'Over the radio.'*
- Facebook
- En la pagina de facebok en Waisn. – *'On the Facebook page of Waisn.'*
- Lo mire en la página de internet. – *'Looked it up on the website.'*
- Through their tax preparer.
- WAISN facebook
- Facebook

## ***What advice would you give first-time applicants?***

### **Feedback themes**

An overwhelming amount of feedback provided various ideas on advice for first-time applicants and/or preparers.

Recommendations to first-time applicants included:

- Complete your federal taxes prior to starting application.
- Seek out free tax prep assistance.
- Read qualifications prior to starting.
- Spread the word!

### **Listening session and survey comments**

- Apply for last year's return! +2
- Keep working to be eligible for the credit.
- I would tell them to bring all their documentation with them and find a free tax prep site (and make sure to ask about the WFTC there).
- They should go through with their tax return document to understand the document.
- Fill out the application even if you don't think you'll get the credit.
- Use the free tax prep assistance around you +2.
- Tell their family and friends about it!
- Use the call center and the Where's My Refund tool for any questions that they have.
- Shout out to the WFTC Coalition, they were my introduction to the credit.
- Gracias!
- Seeking out free tax preparation!
- What was previously said, but if they want to fill out the application themselves make sure they know what information they need beforehand.
- Hard to say - help taxpayers understand EITC - folks don't understand WFTC.
- Worst thing that could happen is you don't qualify.... I ask people if they know what the EIC is? Then I tell them this is WASHINGTON states EIC.
- Just apply, who knows if you can get something.
- Your personal information is not going to be share with ice.
- Apply Apply
- Advice is to ensure that they know DOR does not share any information with federal agencies.
- Que intenten su tramite temprano por si les falta algun documento puedan regresar. – *'That they try their process Early in case they are missing any documents they can return.'*
- Make sure you have all the info needed gathered together.
- It's easier than filing your taxes or applying for other scholarships.
- NO REAL ADVICE. JUST APPLY.
- Finish your tax filing before applying for the WA working families tax credit.
- None
- It's very easy.
- Pay attention.
- Just be patient. Take your time and make sure you read throughout the information.

- Check your income - even a few dollars over disqualifies you.
- Don't expect that you will receive payment in a timely manner. If you are needing that money for a specific purpose that has a time frame, don't.
- It's easy just follow the steps.
- Find out before applying.
- Be patient because it does take a while for you to get it... I've been waiting almost 3 months and all it says when I check the website is that my application was delivered.
- Be patient.
- Look at all your options. It never hurts to try and see if you qualify.
- It comes after your federal tax return.
- Check online accounts with the government.
- Do your taxes first.
- Follow all of the necessary steps.
- Try it. It's ready. If you qualify, great. If not, no matter. The ceiling is pretty low though.
- Be prepared to WAIT.
- Don't wait to apply.
- Pay attention to what you putting in.
- Make sure that everything is done correctly and to have your tax preparer send in the application and not do it yourself through the website as it seems to be taking people that did it through the website themselves longer to get there refund back.
- Be prepared to wait.
- Bookmark the page (s) for future use, as well as the page for checking the status of the refund.
- Worst they can do is say you don't qualify and this is the states EIC.
- Si tienen dudas de como solicitar el credito pregunten ala persona adecuada sobre el credito. - *'If you have doubts about how to request the credit, ask the right person about the credit.'*
- To apply if they think they would qualify.
- To call WAISN to get more information about the credit, so that they are informed.
- To not be scared and get information on how to apply.
- Tener paciencia para que entre la llamada y tener =listos sus documentos. - *'Be patient for the call to come in and have your documents ready.'*
- De hecho ya le recomende a mi familia. les diria que tengan sus documentos a la mano. - *'In fact, I already recommend it to my family. I would tell them to have their documents at hand.'*
- Que tengan sus documentos juntos y en orden para que puedan empezar con su tramite. - *'That they have their documents together and in order so that they can start with their process.'*
- Que es fácil y que si sirve la ayuda. - *'That it is easy and that if help is useful.'*
- Que tenga paciencia para aplicar y que llamen a waisn porque tienen paciencia para llenar la aplicación. - *'That they have patience to apply and that they call waisn because they have patience to fill out the application.'*
- Llame a Waisn para que les ayuden a llenar su aplicación porque explican y ayudan a las personas de la mejor manera. - *'Call Waisn to help you fill out your application because they explain and help people in the best way.'*
- Que no dejen de aplicar, y que no dejen pasar el tiempo. - *'That they do not stop applying, and that they do not let time pass.'*

## ***Is there anything else you would like to tell us?***

### **Feedback themes**

The most popular feedback suggestion was for DOR to make sure the “Where is my Refund?” tool is functioning and kept up to date, as well as improving processing time. In addition, many feedback comments also expressed suggestions to expanding the age qualifications for eligibility.

Sample comments also included:

- Clarifying instructions for self-employed filers.
- Continued, and potentially even more, outreach across communities in the state.

### **Listening session and survey comments**

- Better tracking tool and notify clients once approved and when it's being sent.
- What is goal for refund processing time for 2023? [DOR –We are working to improve processing time.]
- Notifying the applicants if the processing time changes.
- Many of my friends who are full time workers were not able to apply because they are under 25 and don't have kids! I know DOR has no control over that, but I hope the age limit is expanded in the future.
- Is there a different place to track for self-employment applicants? [DOR- No, go to same place.]
- Expanding eligibility age (over 65 with qualifying children/grandkids).
- Agree on age expansion!
- DOR did a great job in for the first year of the tax credit.
- Will the program be continuing for next year too and can people still apply if they haven't filed for 2022?
- Thank you for creating space for this feedback!
- Thank you!
- So said that self-employment is tracked on the same place, but it asked for income on line 1z, if they only had self-employment there is nothing in that line and it doesn't work to track it.
- Is there public facing info we can share with folks about language/ethnicity and WFTC? In terms of applications? [DOR-haven't compiled that info yet. But some data is available].
- Streamlining all the echoes, can DOR do pop ups in neighborhoods across state? Or mobile travel to communities that need their support so people can apply directly?
- Opportunity w/public health for collaboration.
- WFTC mobile clinics. Love the idea!
- Great idea, I agree (mobile clinics).
- Hard to register for a DOR account. Not everyone has access to internet and there are other challenges. They trust paid preparers instead. Invest in training so people can learn to do it. Help people learn to navigate state system.
- Clarification needed on over 65 caring for qualifying child. [DOR-Good question. There is criteria around eligibility. If you don't have qualifying children: age requirement is 25-65. If you have qualifying children: age qualifying goes away, but still have criteria to meet.]



- Data on how many childless workers applied would also be cool.
- How long is the program funded? [DOR- It is funded biennium].
- Can you tell us demographic areas of like how many people applied in Clark County or King County or Thurston County? Basically, what areas are being missed?
- Was this a one-time refund or will there be more years? – [DOR-2 more years at least].
- I did not apply because I am in school, and my mom claims my son on her taxes right now. What are the main qualifications for the tax credit?
- Will there be outreach? Can we sign up now... lol
- Thank you I was just wondering what place needs more attention for outreach.
- I would love car decals. I made my own and cut each letter out.
- You might consider advertising in family courts in all counties across the state. Hispanics do use the courts for marriage, divorce, parenting plans, child support.
- Department is great about talking comments from community, tax prep, and software prep – keep listening and feedback - keep up good work.
- I am on the child support work group and one of the case workers here in Clark County said she loves that I told her about it she tells all her clients about it.
- Wonder if you can expand the grant, there is more work to do!! [DOR - 2.5 M per fiscal year for next 2 years] – awesome!
- I also share it at all my meetings even if it's just a "don't forget you have until 12-31-23 to file for the WFTC". Oh, and T-shirts would have been cool.
- Agradecer a la organizacion que presto apoyo para ayudarnos a llenar la solicitud. – *'Thank the organization that provided Support to help us fill out the application.'*
- Thank you for administering this credit - it has been a HUGE help to our family!
- I FILED MINE ON 3/1 AND STILL HAVE NOT RECEIVED IT. THAT IS VERY FRUSTRATING FOR ME.
- I would like to know why I have not received a decision letter or the tax refund despite applying 02/11/2023 and meeting all requirements.
- Thank you +1
- No +2
- The additional tax credit helped a lot, I think it would help if it was given every year. Maybe in the middle of the year instead of at the beginning/end.
- I think you need a more realistic income level. I am a single mom who works three part-time jobs to make ends meet. My rent is \$1,700 which is on the low end for Bellingham, WA. I would be better off quitting my three jobs and applying for government assistance, but my integrity says that is wrong. It is frustrating to work so hard yet be surrounded by people getting "free" money (I paid almost \$4,000 in federal taxes) and discounts. This is not a sustainable way to run a state.
- Please thank about increasing who you give it to. Other people are hurting not just the ones earning that minimum amount.
- You guys should maybe try and shorten the length ppl have to wait to get the refund it's pretty lengthy application.
- Not at this time. Thank you for making it simple to apply for and getting results in a somewhat timely manner.
- Raise the income ceiling?
- Thank you. I appreciate I was eligible this year. Unless the rules change, at 65 I will not be eligible next year.
- Hopefully get a better wait time next year. I've been waiting for a while and still haven't received anything or at least a date I will receive it.

- I want to know why I keep getting the run around with my application as they tell me everytime I call my application is correct it's just taking longer for mine to be processed it's been well over the 90 days as I applied at the end of February it's now July.
- Hopefully next year goes a lot smoother.
- No but thank you for asking for feedback. Had it been closer to January, I would have been able to provide more clear assessments.
- Que den obcion para actualizar la solicitud por si cometen un error en la aplicaci3n. – *'Give them an option to update the application in case they make a mistake in the application.'*
- This program is great and have heard from other people that they have had a great experience. (This questionnaire was completed with the community member by a WAISN Hotline operator over the phone.)
- The process was great for the community member, and they received the assistance they needed. \*This questionnaire was completed with the community member by a WAISN Hotline operator over the phone.
- Nothing at the moment. \*This questionnaire was completed with the community member by a WAISN Hotline operator over the phone.
- Nada, todo esta bien. – *'Nothing, everything is fine.'*
- Muchas gracias por la ayuda. – *'Thank you very much for the help.'*
- Uchas gracias porque la ayuda fue de mucha utilidad. – *'Thank you very much because the help was very useful.'*
- Muchas gracias a Waisn por la ayudarnos a llenar la aplicaion y ayudar a las personas que lo necesitan. – *'Many thanks to Waisn for helping us fill out the application and helping people in need.'*
- Muchas gracias por el cr3dito, ayuda a pagar gastos. – *'Thank you very much for the credit, it helps pay expenses.'*
- Muchas gracias pr el apoyo. – *'Thank you very much for the support.'*
- The credit was is a great help to community members that need them. \*This questionnaire was completed with the community member by a WAISN Hotline operator over the phone.
- This assistance has been great, and are thankful for WAISN. \* This questionnaire was completed with the community member by a WAISN Hotline operator over the phone.
- It's a great help, and hopes that more people will apply. \*This questionnaire was completed with the community member by a WAISN Hotline operator over the phone.

## How would you like to be communicated with?

The preferred communication method for participants was email.

- Email and a training class.
- Would like to see other webinars on how to-s and info to answer our clients' questions would be helpful.
- Email
- Website, email, and social media.
- I've appreciated DOR's outreach team being able to come to events to set up information tables.
- Notificaciones por email. "*Email notifications*".
- Thank you!
- Email notifications.
- Love to also see more presentations done by the Dept. for new announcement and updates. We also welcome the collaboration with the nonprofit org. for even better outreach.
- Website (too many emails). Likes website easy to use.
- Meeting like this or website but don't make it hard to find.
- By Email. And thank you.
- Text messages
- Email