

GetCTC.org

Step by Step guide to using the GetCTC
Simplified Filing Portal

CODE *for*
AMERICA

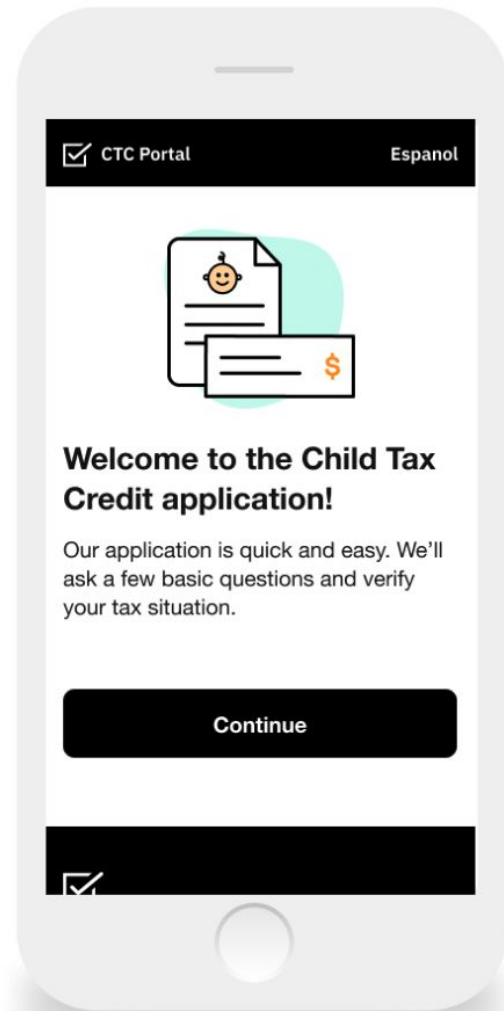


Simplified Tax Filing Portal

For Child Tax Credit and Stimulus Payments

Streamlined e-filing for CTC- and EIP-eligible families
with no filing requirement

- Complement to the IRS Non-Filer Sign-Up Tool
- English and Spanish
- Mobile and user-friendly
- VITA-certified chat support
- Refers complex cases to VITA partners



Important Features and Recommendations

A few important features and recommendations while helping clients

- Based on user feedback, the portal only asks a limited number of questions (1-2) per screen. While this adds more pages to the portal, we believe this better serves users in correctly completing their return.
- To reach the portal in Spanish, go to: GetCTC.org/es
 - ◆ To get to the Spanish portal within your unique URL link, use the following format and replace “sample” with your URL: GetCTC.org/es/sample.
 - ◆ If users get started in English and want to switch to Spanish, they can click “Spanish” at the top of the page.
- If you or the client gets stuck, you can use the “Chat with us” button located on each page to be connected with an IRS-certified customer success specialist.
- Use incognito mode or a private page to pull up the portal when helping clients access the tool.
- Clients will be able to log back into the portal after verifying their contact information. This may be helpful if they don’t have all of their information or want to complete it at a later time.

GetCTC Questionnaire by Section

Below are the different sections of the GetCTC questionnaire. This guide is color coded with each section of the questionnaire so that you can easily jump to that section if a client needs assistance.

You can also click on their tiles below to jump to that section in the presentation.

[Welcome
and
Eligibility](#)

[Basic Info &
Contact
Verification](#)

[Spouse's
Information
\(if applicable\)](#)

[Dependent's
Information
\(if applicable\)](#)

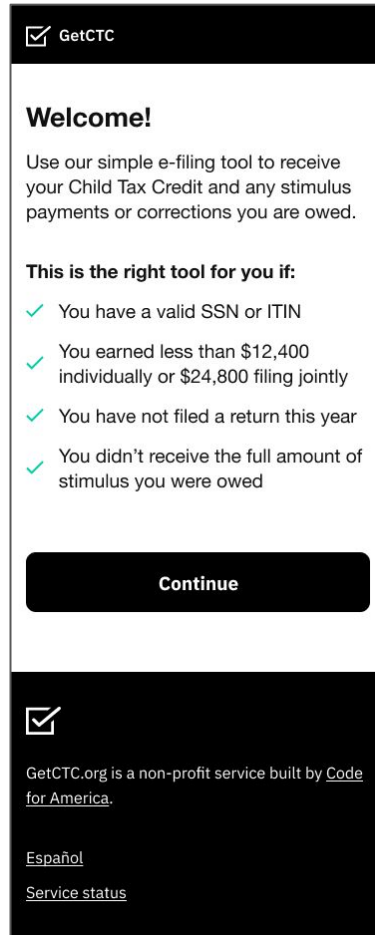
[Recovering
Missed
Stimulus
Payments](#)

[Bank and
Mailing](#)


[Review &
Submit](#)

Welcome & Eligibility

Check to make sure this is the right tool for your clients



The screenshot shows a mobile interface for GetCTC. At the top, there is a black header with a white checkmark icon and the text "GetCTC". Below this, the word "Welcome!" is displayed in bold. A paragraph explains the tool's purpose: "Use our simple e-filing tool to receive your Child Tax Credit and any stimulus payments or corrections you are owed." This is followed by a section titled "This is the right tool for you if:" which contains a list of four bullet points, each with a green checkmark icon. The bullet points describe eligibility criteria: having a valid SSN or ITIN, earning less than \$12,400 individually or \$24,800 filing jointly, not having filed a return this year, and not receiving the full amount of stimulus. A large black button with the word "Continue" in white is positioned below the list. At the bottom of the page, there is a black footer containing a white checkmark icon, the text "GetCTC.org is a non-profit service built by [Code for America](#)", and two links: "[Español](#)" and "[Service status](#)".

 GetCTC


Welcome!

Use our simple e-filing tool to receive your Child Tax Credit and any stimulus payments or corrections you are owed.

This is the right tool for you if:

- ✓ You have a valid SSN or ITIN
- ✓ You earned less than \$12,400 individually or \$24,800 filing jointly
- ✓ You have not filed a return this year
- ✓ You didn't receive the full amount of stimulus you were owed

[Continue](#)

 GetCTC.org is a non-profit service built by [Code for America](#).

[Español](#)
[Service status](#)

The welcome page provides a summary of the tool's basic purpose and qualifications

Eligibility Part 1:

GetCTC

← Go back

x% complete



In 2020, did you earn over:
\$12,400 if filing single
\$24,800 if filing married

Income could come from any of the following sources:


- salary
- hourly wages
- tips
- commissions
- self-employment or contract payments

Yes No

Clients must confirm they did not make more than their filing threshold.

If the client asks, Head of Household filing threshold is \$18,650

← Go back



Unfortunately, you are not eligible to use our simplified filing tool. But we can still help!

In order to file a simplified return through GetCTC you would need to meet the following conditions:

- ✓ You earned less than \$12,400 if filing single, \$24,800 if married filing jointly in 2020
- ✓ You are a U.S. citizen, U.S. national, or U.S. resident alien
- ✓ You cannot be claimed as a dependent
- ✓ You and your spouse have a valid SSN or ITIN

You could still benefit by filing a full tax return for free using GetYourRefund.

Collect all the money you are owed by filing with GetYourRefund.

[File with GetYourRefund](#)


[Visit the Child Tax Credit FAQ](#)

[Visit the Stimulus FAQ](#)

If they made over the threshold, they will be given the option to file a full tax return through GetYourRefund

← Go back

x% complete



If you earned income, you could collect additional benefits by filing a full return!

By filing a full tax return, you could collect all the money you are owed.

Consider this option if:

- You have all of your employment documents (W2's, 1099's, etc)
- You have a paper copy of a Social Security Card or ITIN paperwork for everyone in your family

File your full tax return for free using GetYourRefund.

[Continue filing a simplified return](#)

[File a full tax return](#)

If they made under the threshold, they will be asked if they would like to file a full return to claim all relevant credits. This is a good choice if they have a substantial amount of earned income, and they have all their tax documents and can navigate the longer process. Otherwise, they should continue filing a simplified return.

CODE for AMERICA

Eligibility Part 2:

← Go back



Did you file a 2020 tax return this year?

Did you file a tax return this year, after January 1, 2021, for the 2020 tax year?


Answer yes even if you are still waiting for your stimulus payments, or if you used the Non-filers Sign-Up Tool.

Yes No

If they already filed a 2020 return or completed this year's IRS non-filer tool, they cannot efile another return via this tool or any other method. If they need to update their information, they should use the IRS CTC Update Portal.

✔ Get CTC

← Go back



Did you file a 2019 tax return?

Did you file a tax return for the 2019 tax year? This tax return would have originally been due on April 15, 2020.

Yes, I filed a full return

Yes, I filed using the IRS non-filer portal


No, I didn't file a 2019 tax return

[Continue](#)

If clients filed a full 2019 tax return, they must have their 2019 AGI to use this tool. The IRS requires this for authentication purposes.

Clients should select the second box if they filed using the IRS Non-Filer Portal in 2020.

← Go back



Let's make sure this tool is right for you!

If any of the following are true, you should continue with our simplified tool:

- ✔ The number of people in your household changed from your 2019 tax return
- ✔ You have a different bank account from the one you listed in your 2019 return
- ✔ You didn't receive the full amount of stimulus you were owed

If none of those statements are true, you should receive your payments automatically. You can visit the CTC FAQ for more information.

[Continue](#)

[Visit the Child Tax Credit FAQ](#)

[Visit the Stimulus FAQ](#)


Clients should click "continue" if they wish to update any information filed on their 2019 tax return or non-filer return filed in 2020. If not, there is no need to continue filing this simple return.

CODE for
AMERICA

Eligibility Part 3:

← Go back

x% complete



Can anyone claim you as a dependent in 2020?

Generally, someone can claim you as a dependent if they are your family member, you live with them most of the year, and they pay for most of your living expenses.

Yes

No

If the client can be claimed as a dependent, they do not benefit from filing a simplified tax return because they do not qualify for:

- Advance Child Tax Credits
- 1st, 2nd, or 3rd stimulus payments

They will be routed to the screen that gives them the option to file a full return. This may benefit them if they had withholdings from a job.

Basic Information and Contact Info

Enter primary client's basic information and verifying contact information

Basic Information:

The following screen (split into two images) will ask the client to provide their basic information. The information will be used in filing their return and getting their consent. It's extremely important the client takes their time to enter the information correctly. Errors on this page may result in a rejected return.

[← Go back](#)

In order to file, we'll need some basic information.

To submit your tax return and receive your child tax credit and/or your stimulus payments, we'll need some of your personal information.

Please make sure you enter your name as it appears on your Social Security card or Individual Taxpayer Identification Number (ITIN) letter.

Legal first name

Middle initial

Legal last name

Suffix

Date of Birth
mm / dd / yyyy

By legal name, the form is asking for the legal name as it appears on their social security card or ITIN.

If the client has two legal last names, they should enter both under legal last name.

Form of identity

Social Security Number (SSN) ▼

This SSN is not valid for employment

SSN or ITIN

Confirm SSN or ITIN

Phone number

I was a member of the United States Armed Forces for any time in 2020

[Why are you asking this?](#) >

By continuing, I agree to share my personal information in order to prepare my simplified tax return.

Continue


The tool will only be helpful to someone with a SSN or ITIN. If the client has not yet applied for an ITIN, they will need to seek assistance elsewhere.

Most SSNs are valid for employment, including all SSNs of citizens. SSNs not valid for employment say, "NOT VALID FOR EMPLOYMENT" prominently on the Social Security card. Do not check this box if they have an ITIN.

Phone is required by the IRS. The tool does not use it.

2019 Adjusted Gross Income: Only for clients who filed a 2019 tax return.

[← Go back](#)



What was your 2019 Adjusted Gross Income?

Because you stated that you filed a full tax return in 2019, we'll need to verify what your Adjusted Gross Income (AGI) was in 2019.

You can find this information on Line 8B of your 2019 tax return. Please enter the correct amount from your 2019 return or your return will be rejected.

2019 Adjusted Gross Income

[Why are you asking this? >](#)

Continue

This screen will only appear if the client previously marked that they filed a 2019 tax return (filed in 2020). In order to efile their return, they'll need to enter their exact 2019 AGI.

This can be found on line 8b of their 2019 Form 1040.

Without this information, their return will reject.

If they did not file a 2019 tax return, they'll need to go back to select a different option.

Verifying Contact Information

In order to proceed, clients will need to enter an email address **or** a phone number than can receive texts. This contact preference will be used to send clients updates about their simplified return and can be used to log back into the portal.

← Go back



What is the best way to reach you?

We'll send a code to verify your contact information so that we can send updates on your return. Please select the option that works best!

Note: Standard SMS message rates apply. We will not share your information with any outside parties.

Text me

Email me

If they enter cell phone number

← Go back



Please share your cell phone number.

Cell phone number

Confirm cell phone number

Continue

If they enter email address

← Go back



Please share your email address.

Email address

Confirm email address

Continue

← Go back



Let's verify that contact info with a code!

A message with your code has been sent to: **philipbanks@judge.gov**

Enter 6 digit code

Verify

Resend code

A code will be sent via text or email. It may take a few minutes to arrive.

If sent via email, it will be sent from "hello" and the subject line will say "Update from GetCTC"

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Filing Status

← Go back

x% complete



How will you be filing your tax return?

Single

Married Filing Jointly

For purposes of filing a simplified return, the client can only select filing single or married filing jointly.

If they are not filing with a spouse, they should select single. This includes head of household, qualifying widower, and married filing separately.

If they select “single” they will skip the spouse questions and go straight to the question on slide 20 of this deck

Spouse's Information

These questions will only be asked if a client marks married filing jointly

Entering Spouse's Basic Information

The following screen (split into two images) will ask for the spouse's basic information. It's important the client or spouse takes their time to enter the information correctly. Errors on this page may result in a rejected return.

[← Go back](#)

Tell us about your spouse.

Please make sure you enter your spouse's name as it appears on their Social Security card or Individual Taxpayer Identification Number (ITIN) letter.

Spouse's legal first name

Middle initial

Spouse's legal last name

Suffix

Spouse's date of birth
mm / dd / yyyy

By legal name, the form is asking for the legal name as it appears on their social security card or ITIN.

If the client has two legal last names, they should enter both under legal last name.

Spouse's form of identity

Social Security Number (SSN) ▼

This SSN is not valid for employment

Spouse's SSN or ITIN

Confirm spouse's SSN or ITIN

My spouse can be claimed as a dependent by someone else

My spouse was a member of the United States Armed Forces for any time in 2020

[I'm not sure. >](#)

[Save this person](#)

[Remove this person](#)

The tool will only be helpful to someone with a SSN or ITIN. If the spouse has not yet applied for an ITIN, they will need to seek assistance elsewhere.


Most SSNs are valid for employment, including all SSNs of citizens. SSNs not valid for employment say, "NOT VALID FOR EMPLOYMENT" prominently on the Social Security card. Do not check this box if they have an ITIN.

Generally, a MFJ filer can't be properly claimed as a dependent. But, if they were claimed as a dependent, the return *will* reject.

See [Common Rejects and Next Steps](#) to help someone who thinks they were wrongfully claimed as a dependent on another person's return.

Spouse's 2019 Return and AGI

[← Go back](#)



Did your spouse file a 2019 tax return?

Did your spouse file a tax return, after January 1, 2020, for the 2019 tax year?


- My spouse filed a full tax return jointly with me
- My spouse filed a tax return with me using the IRS non-filer tool
- My spouse filed a full tax return separately from me
- My spouse filed a tax return separately from me using the IRS non-filer tool
- My spouse did not file a 2019 tax return

[Continue](#)

To correctly file the client's return, we'll need to know the details of if and how the spouse filed their 2019 tax return.

If the spouse did not file in 2019, they should select the last option.

[← Go back](#)



What was your spouse's 2019 Adjusted Gross Income?

Because you stated that your spouse filed a tax return in 2019, we'll need to verify what your spouse's Adjusted Gross Income (AGI) was in 2019.

You can find this information on Line 8B of your spouse's 2019 tax return. Please enter the correct amount or your return will be rejected.

2019 Adjusted Gross Income

[Why are you asking this? >](#)

[Continue](#)

This screen will only pop up if the spouse marks that they filed a full 2019 tax return *separate from the primary taxpayer*.

In order to efile their return, they'll need to enter their exact 2019 AGI.

This can be found on line 8b of their 2019 Form 1040.

Without this information, their return will reject.

Review Spouse's Information


← Go back

x% complete

Let's confirm your spouse's information.

We have added the following person as your spouse on your return.

Your spouse

 Vivian Banks edit

Date of birth: 3/16/67

SSN: XXX-XX-3456

Continue

After the spouse's information is entered, the client can double check that the information is correct and go back to make edits as needed.


Dependent's Information

These questions will only be asked if a client marks that they would like to claim a dependent

Adding a Dependent

[← Go back](#)

x% complete



Would you like to claim a dependent for 2020?

Someone who lived with you for a majority of the year or who you supported financially could qualify as a dependent.

[Which relationships qualify? >](#)

Yes

No

Clients should mark yes for anyone they can claim as a dependent, even if they don't qualify for the Child Tax Credit.

Client should select 'yes' even if they are not sure whether they can claim someone. The tool will determine whether they can claim that dependent.

Clients who don't have a dependent will skip to Recovery Rebate Credit questions.

Entering Dependent's Basic Information

The following screen (split into two images) will ask for the dependent's basic information. It's important the client takes their time to enter the information correctly. Errors on this page may result in a rejected return.

← Go back

VIEW SCREEN

Let's get some basic information about your dependent!

To avoid delays, please provide your dependent's legal information as it is written on their identification card.

Dependent's legal first name

Dependent's middle initial

Dependent's legal last name

Suffix

By legal name, the form is asking for the legal name as it appears on their social security card or ITIN letter.

If the dependent has two legal last names, they should enter both under legal last name.

Date of birth
mm / dd / yyyy

What is their relationship to you?
Biological child ▼

Select any situation that is true:

Dependent is a full-time student

Dependent is permanently and totally disabled

What is a permanent disability? >

Continue

There are two types of dependents: “qualifying child” and “qualifying relative.” The information entered on this page will be used to determine which one this dependent may be. Make sure clients take the time to read each question and answer to the best of their knowledge.

Depending on the information entered, they will be taken to different questions to determine if that individual qualifies. Those options are shown on the next four slides.

Option 1: Qualifying Child Part 1

← Go back

x% complete

Great, let's make sure [dependent] qualifies!

Select any situations that were true in 2020:

[dependent] paid for more than half of their own living expenses

[dependent] does not have a valid SSN or Adoption Identification Number

[Dependent] was married and filed taxes with their spouse

None of the above

Continue

← Go back

x% complete



Did [Dependent] live with you for more than 6 months in 2020?

Yes No

If any of the three conditions are true, the person cannot be claimed as a dependent for CTC or EIPs.

← Go back

x% complete

Were any of the following true for [dependent]?

They could still qualify for payments if they lived with you for less than 6 months and any of the following were true.

[dependent] was born in 2020

[dependent] was lawfully placed with you for adoption in 2020

[dependent] passed away in 2020

[Dependent]'s permanent residence was with you for at least six months, even if they were away for part of that time

None of the above

Continue


Generally, the client needs to live with their dependent for at least 6 months. If they enter that the child did not, they'll be taken to this screen to see if any exceptions apply.

If they don't qualify for any of the exceptions, the person is not a qualifying child, though they may still be a qualifying relative.

Option 1: Qualifying Child Part 2

← Go back

x% complete



Are you the only person who can claim [dependent]?


You might say no if you share caregiving responsibilities with someone else.

Yes No

If the client marks no, they will be taken to this screen.

← Go back

x% complete



Would you like to claim [dependent] anyway?

If you and someone else are eligible to claim [dependent], you should follow any existing agreement with the other person about who claims them.

Yes No

Certain family dynamics and agreements may mean that multiple individuals are eligible to claim the same dependent; however, that dependent can only be claimed on one tax return each year. Clients may consider pausing at this point to get in touch with any other family members who could have claimed the dependent.

If the client is confident that they are the only person who will claim the dependent, they should mark that they want to claim the dependent anyway.


If someone has already claimed the dependent on their 2020 tax return and the client claims the dependent, the return will reject. This is very common. The client would have two primary options:

1. File a paper return and let the IRS will open up an investigation to see who has the right to claim the dependent. This process can take 6+ months and can create serious ramifications for the individual who incorrectly claimed the dependent.
2. Remove this person from their 2020 tax return and file to claim any other benefits. They would then wait to claim the dependent on their 2021 tax return and talk over this decision with the other person who claimed the dependent. Most of these decisions are made between family members or parents.

Option 2: Qualifying Relative

← Go back

x% complete



Were all of the following true in 2020?

- ✓ You paid for more than half of [Dependent]'s expenses
- ✓ [Dependent] earned less than \$4,300
- ✓ [Dependent] has a SSN or ATIN
- ✗ [Dependent] did not live with someone else who could claim them
- ✗ [Dependent] did not file jointly on a separate tax return

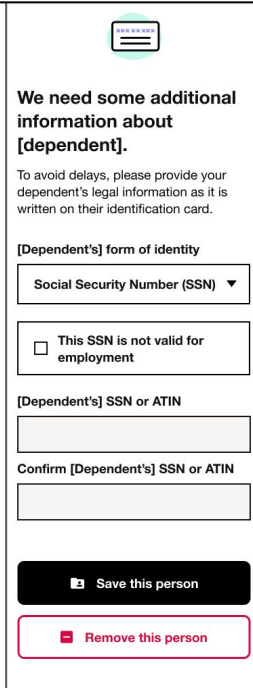
✓ Yes ✗ No

Dependents who are not a qualifying child but still may be a qualifying relative will be taken to this page. **All** of these conditions have to be true for this to be a qualifying relative. It is relatively rare for clients to have a valid qualifying relative.

Additional information

Based on how the client responds to the previous questions, the portal will determine if the listed person is a qualifying dependent. The client will be shown one of the following screens:

If a qualifying dependent



The screenshot shows a form for adding a qualifying dependent. At the top, there is a small icon of a Social Security card. The main heading is "We need some additional information about [dependent]." Below this, a sub-heading reads "We need some additional information about [dependent]." A note states: "To avoid delays, please provide your dependent's legal information as it is written on their identification card." The form includes a dropdown menu for "[Dependent's] form of identity" with "Social Security Number (SSN)" selected. Below this is a checkbox labeled "This SSN is not valid for employment" which is unchecked. There are two input fields for "[Dependent's] SSN or ATIN" and "Confirm [Dependent's] SSN or ATIN". At the bottom, there are two buttons: a black button with a plus icon and the text "Save this person", and a red button with a minus icon and the text "Remove this person".

Clients can enter an SSN or an Adoption Taxpayer Identification Number for their dependent.

Most SSNs are valid for employment, including all SSNs of citizens. SSNs not valid for employment say, "NOT VALID FOR EMPLOYMENT" prominently on the Social Security card. Do not check this box if they have an ATIN.

If not a qualifying dependent

[dependent] can't be claimed as a dependent.

For a dependent to qualify for CTC or stimulus payments they would need to meet the following conditions:

- ✓ The dependent has a valid Social Security Number or Adoption Identification Number
- ✓ The dependent was a U.S. citizen, U.S. national, or U.S. resident alien
- ✓ The dependent lived with you for more than half of 2020
- ✓ The dependent did not provide over half of their own support for 2020
- ✓ The dependent did not file a joint return with his or her spouse in 2020
- ✓ The dependent was not claimed as a dependent on another return

+ Add another dependent

Done adding dependents

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Dependent Confirmation Page

← Go back


x% complete

Let's confirm!

Dependents qualifying for CTC and stimulus


 Ashley Banks

Date of birth: 5/12/97
SSN: XXX-XX-7890

 Hilary Banks

Date of birth: 9/10/89
SSN: XXX-XX-4567

Dependents qualifying for only stimulus

 Jazzy Jeff

Date of birth: 7/22/79
SSN: XXX-XX-9876

Once a dependent is added, the client will be asked to confirm their information and be given a chance to add any other dependents.

Qualifying dependents are separated into two categories:


1. Dependents who qualify for the Advance Child Tax Credit and all three stimulus payments.
 - a. Generally, these are *qualifying children* (not qualifying relatives) born after January 1, 2004.
2. Dependents who qualify for one or all stimulus payments.
 - a. Most dependents in this category will only qualify for the 3rd stimulus payment. The only dependents in this category that will qualify for all three stimulus payments are those with an Adoption Taxpayer Identification Number.

Recovering Missed Stimulus Payments

This section will help clients claim any missed 1st or 2nd stimulus payments

Determining Missed Stimulus Payments

[← Go back](#)



We believe you are eligible for this much in the first two stimulus payments.

First stimulus payment

\$1200

This payment should have arrived between April 2020 and October 2020.

Second stimulus payment

\$600

This payment should have arrived between December 2020 and January 2021.

Did you receive this amount?

Clients who missed all or part of their 1st or 2nd stimulus payments will recover them as the Recovery Rebate Credit on this tax return.

Based on the information already entered by the client, the portal calculates the amount of stimulus payments the client should have received. This calculation does not include the third stimulus payments (worth \$1,400 per person). The third payment is handled automatically by the IRS, and the client should not include the 3rd payment when asking if they received the full amount.

Note that the rules changed after the payments were made, such that some clients now deserve more or less than the original automatic payment. This is especially relevant for mixed-status families, and children who turned 17 in 2020.

If the client received more than the reported amount, they do not have to repay the excess and should select they received this amount.

If they received the correct amount (or more) of one payment and less than the other payment, they should select “I received less than this amount.”

Clients who select “I received this amount” will be taken to the screen shown to the right.

[← Go back](#)

x% complete

It looks like you've received the full amount of your first two stimulus payments.

Amount you've received

EIP 1: \$1,700

EIP 2: \$1,200

Recovering 1st Stimulus Payment

← Go back

Did you receive any of the first stimulus payment?

The first of three stimulus payments was sent between April 2020 and October 2020.

This payment was \$1,200 per adult filer plus \$500 per dependent (for example, a parent caring for two children would have received \$2,200).

Yes No

Clients will first be asked if they received any of the first stimulus payment.

If they mark yes, they'll be asked to enter the exact amount received. If they mark no, it will assume they are due the entire amount.

If they aren't sure how much they received, they should try and find that information on the IRS website or through their bank account.

If an incorrect amount is entered, the IRS will calculate the correct amount and send that payment to the client; however, this could cause significant delays in receiving their full refund and Advance CTC payments, if eligible.

← Go back

Enter the total amount you received for your first stimulus payment.

The first stimulus payment, formally known as Economic Impact Payment 1, was sent between April 2020 and October 2020.

Enter the amount you received, if any, for that payment.

[Where can I find this amount?](#)



Economic Impact Payment 1

\$

Continue

Recovering 2nd Stimulus Payment

← Go back



Did you receive any of the second stimulus payment?

The second of three stimulus payments was sent between December 2020 and January 2021.

This payment was \$600 per adult filer plus \$600 per dependent (for example, a parent caring for two children would have received \$1,800).

Yes No



Clients will be asked the same question for their second stimulus payments.

If they mark yes, they'll be asked to enter the exact amount received. If they mark no, it will assume they are due the entire amount.

If they aren't sure how much they received, they should try and find that information on the IRS website or through their bank account.

If an incorrect amount is entered, the IRS will calculate the correct amount and send that payment to the client; however, this could cause significant delays in receiving their full refund and Advance CTC payments, if eligible.

← Go back



Enter the total amount you received for your second stimulus payment.

The second stimulus payment, formally known as Economic Impact Payment 2, was sent between December 2020 and January 2021.

Enter the amount you received, if any, for that payment.

[Where can I find this amount?](#) >

Economic Impact Payment 2

\$

Continue

1st and 2nd Payments Claimed on Return

[← Go back](#)

x% complete

It looks like you are still owed some stimulus payments. Would you like to claim them?

Amount you've received [edit](#)

EIP 1: \$1,200

EIP 2: \$600

You could be eligible for an additional:

\$1,100

If the amount you entered for your EIP 1 or 2 is incorrect your stimulus payments and any Child Tax Credit could be delayed while the IRS makes corrections to your return.

Yes, claim my missing stimulus

No, just claim my Child Tax Credit

After entering the amount of EIP1 or EIP2 (aka 1st and 2nd stimulus payments) received, the portal will calculate the difference.

The client can choose if they'd like to claim the missing stimulus payment(s) as a Recovery Rebate Credit on their tax return or continue without it.

If the amount is wrong, it will delay CTC and third stimulus payments as well, while the IRS corrects the error. The IRS has not shared how long this delay might be.

Bank and Mailing

Clients enter how they would like to receive their payments

Selecting Payment Method

← Go back

x% complete



How would you like to receive any payments?

If you select a mailed check, please provide an address you will be at through December 2021.

Direct deposit (fastest)

Mail my payment (slower)

Continue

Clients will choose how they'd prefer to receive their payments. Direct deposit is the fastest and most secure way to receive payments from the IRS.

Adding Bank Account Information

If client selects direct deposit, they will see the following screens.

← Go back

Great, please provide your bank details below!

Your name must be listed on your bank account for you to receive your money.

Bank name

What type of account is this?

Checking

Savings

Your name must be on the bank account to receive a direct deposit.

I confirm that my name is on this bank account.

Continue

← Go back

Please provide your bank's routing number

Routing number

Confirm routing number

012345678 123456789123 123

routing number

Continue

← Go back

Please provide your account number

Account number

Confirm account number

012345678 123456789123 123

account number

Continue

← Go back

x% complete

Great! Check to make sure your bank information is correct.

Your bank information edit

Bank of Bel Air
Type: Checking
Routing Number: 1000001
Account Number: 123456789001


Continue

It's important for clients to double check their bank account information to ensure they receive all IRS payments.

CODE for AMERICA

Mailing Address

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Great, please provide your mailing address below.

Street address or P. O. box

Apartment number (optional)

City

State

California ▾

Zip code

Continue

The IRS requires a mailing address on all returns, so clients will enter their mailing address even if they select direct deposit as their payment preference.

If the IRS is unable to send a payment as direct deposit, they'll send it as a check in the mail to this address.

The IRS will also use this address to send any necessary communication to the client.

Clients should select a mailing address that they will have access to through December 2021, to ensure they get all payments and correspondence from the IRS.

[← Go back](#)

x% complete

Great! Please confirm your mailing address.

Your mailing address [edit](#)

26 WILLIAM ST
BEL AIR, CA 90001

Note: Address formatting may appear different to match US Postal Service standards.

Confirm


Review & Submit

Clients review the information they've entered and submit it to the IRS

Identity Protection PIN

← Go back

x% complete



Has anyone on your return been issued an IP PIN because of identity theft?

What is an IP PIN? >

Having an IP PIN is rare. If you are unfamiliar with what this is, it's likely that you have not been issued an IP PIN. Select 'None of the above' to continue.

[Client name]

[Spouse name]

[Dependent 1]


[Dependent 2]

None of the above

Continue

← Go back

x% complete



Please enter the IP PIN below.

If you are a confirmed victim of identity theft and the IRS has resolved your tax account issues, the IRS will mail you a CP01A Notice with your IP PIN, a 6 digit number assigned to certain eligible tax filers. [You can retrieve your IP PIN through this IRS page.](#)

[Client's] IP PIN

[Spouse's] IP PIN

Continue

An Identity Protection PIN (IP PIN) is a six-digit number the IRS provides to people who have been victims of identity theft, or who opted into the IP PIN program. It is relatively uncommon to have an IP PIN; only a few million people in the country have one.

If the client, their spouse, or dependents were issued an IP PIN, they need to include it on the return or it will reject.

If they lost their IP PIN, they can retrieve it online at [Get an IP PIN](#) or by calling 800-908-4490.

If they are unable to retrieve their IP PIN, they will need to mail their return to the IRS and respond to the IRS verification letter.

Review Information and Select PIN

[← Go back](#)

x% complete



You're all set! Now let's review your information and set a PIN.

Your information

Philip Banks
Date of birth: 1/1/1950
Email: unclephil@judge.gov
Phone: 555-555-5555
SSN: XXX-XX-6789

Your mailing address

26 WILL SMITH WAY
BEL AIR, CA 90001

Your spouse

 Vivian Banks
Date of birth: 1/1/1950
ITIN: XXX-XX-6789

Your dependents

 Ashley Banks
Date of birth: 1/1/2000
SSN: XXX-XX-6789

 Hilary Banks
Date of birth: 1/1/2000
SSN: XXX-XX-6789

 Jazzy Jeff
Date of birth: 7/22/79
SSN: XXX-XX-9876

Your bank information

Bank of Bel Air
Type: Checking
Routing Number: 1000001
Account Number: XXXXXXXX0001

After completing this information, the client will be asked to review their information before submitting it to the IRS.

This is a 5 digit number that you choose as your own password. This PIN can be used to verify your identity when filing next year's tax return.

[Client's] Five Digit PIN

[Spouse's] Five Digit PIN

I'm ready to file

At the bottom of this screen clients must choose a 5-digit PIN to e-file their return.


This PIN is NOT their IP PIN.

They can use the PIN to verify their identity when filing next year's taxes.

Efile Consent, and Return Submitted to IRS

[← Go back](#)

x% complete



Please read through the legal information before submitting your tax return.

Under penalties of perjury, I declare that I have examined this return (or request for refund) including any accompanying statements and schedules and, to the best of my knowledge and belief, it is true, correct, and complete.

I consent to allow my Intermediate Service Provider, transmitter, or Electronic Return Originator (ERO) to send my return (or request for refund) to the IRS and to receive the following information from the IRS: a) an acknowledgment of receipt or reason for rejection of transmission; b) an indication of any refund offset; c) the reason for any delay processing the return or refund; and d) the date of any refund.

I am signing this tax return by entering my self-selected signature PIN and associated electronic signature data on the previous page.

I agree

File my return

Clients must agree to the consent form in order for GetCTC.org to transmit their return to the IRS.


Once they mark “I agree” and click “File my return”, their return will be transmitted to the IRS for processing.

Clients will have the ability to download a copy of their simple tax return after it’s been submitted. The portal will also send a notification to the client via text or email letting them know their return has been submitted. They will receive another notification once their return has been accepted or rejected.

CTC Portal

Thank you for filing with GetCTC!

Current tax return status:

 Electronically filed

Your return has been submitted to the IRS. You will know in 48 hours if your return has been accepted.

[Download my tax return](#)

[Message my tax preparer](#)

GetCTC.org is a non-profit service built by [Code for America](#).

[Español](#)

[Service status](#)

GetCTC

Sample Email

Your tax information has been successfully submitted!

Hello Test,


Your tax information has been successfully submitted to GetCTC!


We are currently processing your information to send it to the IRS. You will receive a confirmation email within 48 hours to let you know if your information has been accepted or rejected.

We're here to help!
Your tax team at GetCTC.org

After Submitting the Return

Soon after submitting the return, clients will receive an email or text letting them know if their return was accepted or rejected by the IRS.

<p> GetCTC</p> <p>Thank you for filing your taxes with GetCTC!</p> <p>Hello Sarah,</p> <p>Thank you for filing your taxes with GetCTC! Your taxes have been accepted by the IRS which means that they can begin processing your payments.</p> <p>You can check the status of your payments with the IRS at https://www.irs.gov/credits-deductions/child-tax-credit-update-portal</p>	<p>Sample accepted notification email: No additional action necessary.</p>
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<p> GetCTC</p> <p>Attention needed to submit your taxes with GetCTC</p> <p>Hello Test,</p> <p>Thank you for filing your taxes with GetCTC! Unfortunately, your tax return has been rejected by the IRS.</p> <p>Sign in to see next steps for correcting and resubmitting your tax information: https://getctc.org/en/portal/login</p> <p>We're here to help! Your tax team at GetCTC.org</p>	<p>Sample reject notification email:</p> <p>Clients will need to log back into the portal using their phone number or email address and last four digits of their SSN or ITIN to see the reason for the reject.</p> <p>Additional information and next steps will be provided on the portal.</p>
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**Thanks for helping clients
navigate the GetCTC.org portal!
Please stay connected and look for other
resources on our Navigator Resource Page:
[GetCTC.org/navigators](https://www.getctc.org/navigators)**