

**Working Families Tax Credit  
Tax Preparer Listening Session Report  
June 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.

Tax preparers (professional and volunteer) helped the Department of Revenue (DOR) promote the Working Families Tax Credit through their networks and clients. Additionally, these preparers assisted and completed applications on behalf of their clients.

Many federal income tax preparation software companies have added Washington's Working Families Tax Credit (WFTC) application to their systems. Using Modernized e-File (MeF) software, tax preparers were able to assist applicants with the WFTC application at the same time they filed their federal income tax return.

In June 2023, the Department of Revenue hosted two virtual listening sessions for these tax preparers to share their experience with the Working Families Tax Credit program. During each session, preparers 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?
- What advice would you give first-time tax preparers?

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

## LISTENING SESSIONS APPROACH

Tax preparer listening sessions were held via Zoom and included a facilitator, host, and note-taker. Each session covered the same questions.

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

During these sessions, tax preparers (professional and volunteer) were invited to provide their feedback, both verbally and via chat. These listening sessions were not recorded. For preparers 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:

- Wednesday, June 21 at 10 a.m.
- Thursday, June 22 at 1 p.m.

Total attendees: 27

Attendance rate: 43%

Total comments collected: 330.

## SURVEY RESPONSES

We received 47 survey submissions including:

- 33 responses from Washington
- 2 responses from Oregon
- 2 responses from Idaho
- 1 response from British Columbia, Canada
- 9 responses with an undetermined location



*SURVEY RESPONDENT GEODATA LOCATIONS IN WASHINGTON, OREGON, IDAHO, AND BRITISH COLUMBIA*

## **ORGANIZATIONS REPRESENTED**

In both listening session registration and in the survey, preparers had the option to provide the organization (if applicable) they were representing. The following organizations were noted:

AARP	Jackson Hewitt	Safeway
ALP Tax & Accounting Svcs, LLC	Liberty Tax	Salvation Army
Ellis Bookkeeping & Tax	Lower Columbia CAP	TaxMedics, LLC
Encompass Tax Solutions, PLLC	Marlene Biggs Accounting, LLC	The Tax Lady, Inc
Global Permits	Maruji & Raines	Tractor Supply
H&R Block	Park Oil Company	VITA

## KEY FINDINGS

### APPLICATION PROCESS

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

##### Feedback themes

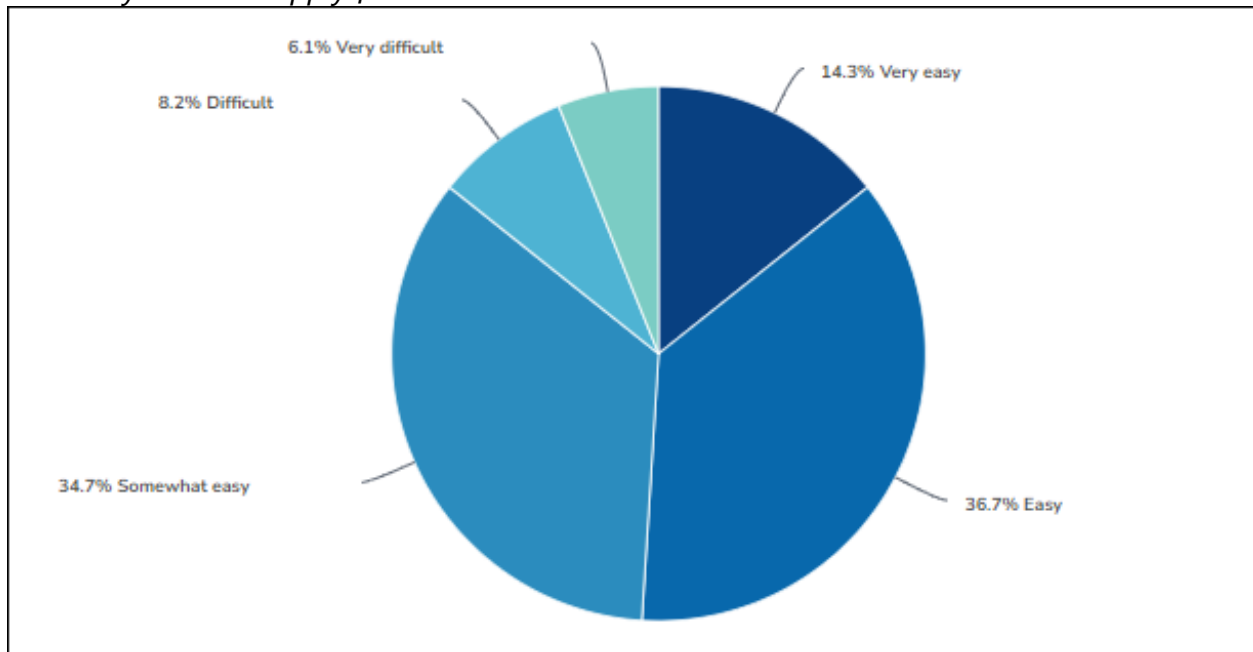
Respondents in both the listening session and the survey agree that the overall ease of applying for the credit was "easy". Those respondents who filed via MeF software were more likely to give this question a higher "ease of applying" rating.

Noted challenges included:

- Clearer communication of age requirements.
- Preparers calculated that self-employed applicants were eligible: however, the applicant was denied the credit.
- Confusing language and locating data on tax return to complete application.
- Logging into the 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

- HR Block – automated popped up with the software. Very easy and automatically flowed/prompted when filing taxes.
- Tax counselor – process was easy. Had to remember that some folks may be candidates. (Used AARP software.)
- It was fairly easy through my tax software. I only had issues with several self-employed clients that were eligible by my calculations, but then were denied the credit.
- The only thing is for some reason or another any time I file for a stimulus, economic or child credit. It takes months to get anything. If me and someone else file, the same time they will receive theirs a month or 2 before me. I have to jump through a bunch of hoops before getting anything. The 3 stimulus we got in Washington state I still am waiting for them after jumping through every hoop they throw at me. But other than that, I appreciate getting money to help me out. I need it more than you think.
- I just really appreciate everyone who worked so hard to get this credit to families like mine. I know there must have been a lot of work behind the scenes in terms of planning, testing, marketing, etc. and I think everyone did a great job.
- The portion that required the exact amount of the refund was somewhat unnecessary.
- I do my taxes on time and very organized with my paperwork so that was a plus for me.
- Time consuming. Why require us to enter all the information AND attach tax return. You have no way of knowing the tax return was actually filed.
- I tried multiple times it would t let me log in or do anything.
- Was not offered to me and my husband.
- The online application would not work. I had to mail in the form the middle of February.
- Since my age disqualified me, it was impossible.
- You had to file a state return to get the credit.
- I am too old to qualify for the program.
- I used the TaxSlayer software as a volunteer tax preparer with United Way of King County.
- A little bit easy only because my tax person did it for me, but I didn't have any idea myself how to do it I wouldn't have no idea how to do it.
- There were specific questions to gather data from last years' tax return that were difficult for me to find and/or understand, as I am NOT a tax preparer, but an individual.
- I should have sent it with my tax return instead of waiting. But I couldn't afford the cost, because unlike federal tax, Washington tax charges us.

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

### **Feedback themes**

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

Common themed responses include:

- The process was quick and easy.
- The navigation was simple.
- Seamless integration with tax software.

Feedback to note:

- Provide clarification around “dependent in school” (Does this mean K-12 and/or college)?
- Had to key in dependent information multiple times (this could lead to errors).

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

- HR Block – Had to key in dependent information in 1040 and then again had to re-key same information for the application. + 1 - Once for Federal return and once for WaWFTC
- Was the demographics necessary?
- Application was easy – question around dependent in school – could we provide clarification k-12 and/or college.
- Easy (per VITA volunteer) seamless integration in Tax slayer.
- Applied for friends and family and refund was received very fast in bank accounts.
- Not exactly positive on that being there is always trouble getting for some reason or another.
- Quickly able to complete.
- Que fui con un preparador de impuestos. *“That I went to a tax preparer”*.
- Finding the site.
- Online
- It was quick and understandable questions.
- It was a fillable form.
- The application itself.
- Everything was good.
- I started applying on the My DOR website but had to pause because I didn't have my taxes submitted yet. Once I started doing my taxes in Turbo Tax, they walked me through the credit as part of the state process that followed my federal return. Both sites were incredibly easy and clear. It also helps that there were several ambassadors in my community who let me know about the credit and encouraged our family to apply.
- It was understandable.
- How the navigation was simple.
- Everything, this was very user friendly. I simply did it at the same time I did my taxes.
- The process was easy.
- Working with turbo tax representatives and reading about tax credit situations.
- Easy to find info to apply for family credit.



- Directions, the zoom video, the email updates, the personnel who called and gave me a chance to correct my errors.
- Nothing
- The application was ok.
- Nothing

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

### **Feedback themes**

Responses in both the listening session and survey shared common themes concerning challenges in applying for the credit. The most common feedback was around communication and expectations for results from the application (receiving the refund) and ensuring the right documents were available prior to starting the application.

Feedback included:

- Driver's License number (Driver's license not typically collected for existing tax clients.)
- Repeated keying of information (from 1040 to application).
- Demographic questions were lengthy.
- Add the dollar amount of the estimated refunded to be included on a confirmation print out, along with an estimation of when they may receive the refund.
- Shorten the confirmation page from six pages.

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

- I'm the Pierce County District Coordinator for AARP Foundation Tax-Aide. I did not receive one complaint from our volunteers. Yet, I wanted to listen in to other's experience.
- Challenge – copy and pasting every value/data from 1040 to application (with MEF.)
- I worked for H&R too. Even when the sw shows that it is credited to the client. there are no form shows in preview or final print-out -- do you have a final official form shows all the entries?
- Biggest challenge answering the question when they will get the refund.
- Clients that wanted to apply on their own seemed to have problems and came back to H&R. Can it be made simpler so they can do it on their own. (Thru the website).
- I did not realize they could have mailed in the applications, or I could have directed them in that direction.
- 2 items of feedback on printed form via MeF – length was 6 pages print out and add dollar amount of estimated refund.
- Not clear to payer or preparer how credit relates to Driver's License numbers (why need?) is it necessary – does it make processing faster.
- Too much demographic dropdown.
- Hold Listening session sooner (after tax season) so experience fresher in minds.
- Receiving the money in direct deposit, check or they send me a card. I would love to just get one. To help my situation.
- Getting notices.
- Remembering the amounts.
- Buscar ayuda. "To look for help."
- Getting information in return.
- Waiting for the results.
- Confirming the right documents.
- No challenge.

- Nothing
- Having to complete my taxes first, just in terms of having an additional thing to remember I had to do once my federal return was submitted. However, the integration with the eFile software saved the day there. :)
- You to have your social security number ready to type in and also have your W2's out and or tax return paperwork ready to upload.
- Needing a mailing address while couch surfing.
- No challenge
- I didn't have any.
- Not knowing about it and longer process, turbo tax had to check it out too.
- Nothing it was easy.
- Getting the proper paperwork on my phone.
- Intuit Pro Series was not one of the software programs available for filing.

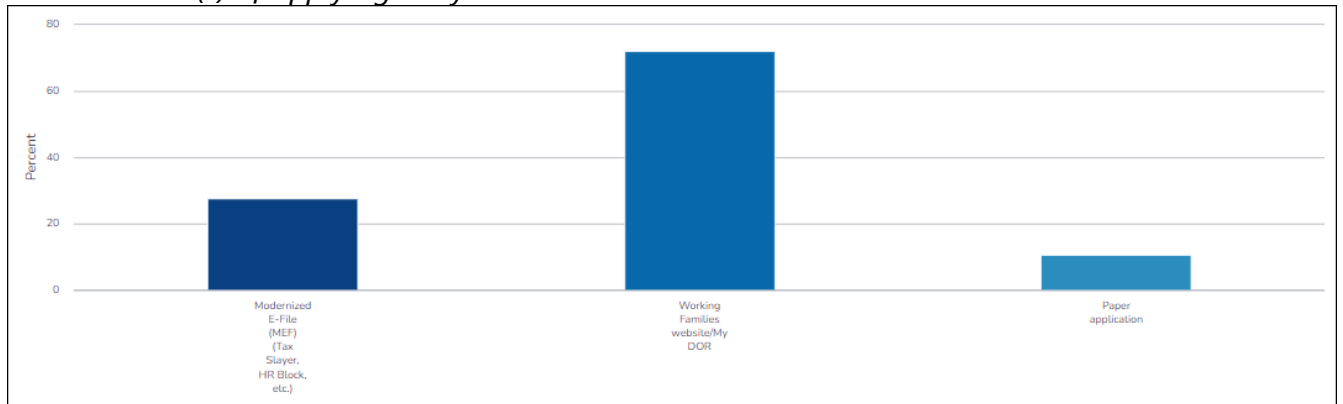
## What method(s) of applying did you use?

### Feedback themes

Survey data shows that most applications were submitted via Working Families website/My DOR. In the Listening sessions we heard from participants who used MeF software such as Tax Slayer, H&R Block, Drake, and Lacerte.

### Survey responses

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



PERCENT BY METHOD USED TO APPLY.

### Listening session and survey comments

- Drake
- HR Block + TaxSlayer
- I used CCH ATX, but didn't use the software, used the DOR website.
- The website was very easily navigated.
- TaxSlayer
- Lacerte tax software

## 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 survey and listening session was consistent between participants contacting DOR via phone, searching the website for help, or not reaching out at all. One participant noted that they were not aware that call centers were available.

Other methods used for support include:

- H&R helpdesk
- Community Action Council
- FAQ's link

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

- One communication with DOR about a denial and needed to provide a lot of follow-up information like power of attorney, and lots of other documents to attach to correspondence and not sure of result. Very time consuming and appeal process and determination glossary (explain language).
- H&R help desk.
- I called the contact us number once for a client it was what I expected she had me have the client call and it was handled, but that has always been my experience with DOR they are extremely helpful every time I have had to call.
- Called the helpline.
- To mostly search on the web site. Didn't know call centers were available.
- I didn't reach out but probably should have :)
- It's ever easy if you call on the phone you sit on it for a least an hour or more. Then when they transfer you, they just hang up. Then you have to start all over again. Writing to them might be easier.
- I couldn't.
- I didn't +3
- Marcando por teléfono. "Dialing by phone"
- Chat
- Online +2
- I had to call. +2
- I didn't need it.
- Thru phone.
- The Okanagan community action council.
- The FAQ's link.
- Called the phone number on file.
- I went through turbo tax and was told I had to paper file since it changed filing status for the year.
- No. It explained everything in detail.

## ***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.

Sample feedback included:

- Continue promoting through social media.
- Bulk neighborhood/geographical targeted postcard mailers.
- Continued partnership with community organizations.

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

- Message for those who log into Saw account > do we promote when they log in for any reason? Is there any advertisement or notice message?
- Most of the people I talked to had not heard of the program. How about Public Service Announcement on radio, TV, and/or newspaper (Spanish and English)
- Can DOR mail to those not applied, for the credit - may be somebody even don't know this credit.
- Sends postcards to previous clients to HR Block in October/November. Include blurb on these mailers about WFTC. [DOR provide information for inclusion in Tax Prep mailers.]
- None of my clients had heard about the tax credit. I think a mailer would be helpful if it is feasible.
- The application was in the state tax income tax section of the software since WA does not have income tax/filing. You had to know that it was there...There may have been a banner that popped up to for WFTC.
- I would see if the taxpayer was eligible for the federal EITC. If yes, I would add WA to the return and fill out the WFTC form.
- How did other applicants apply if they did not go through VITA/AARP?
- Question: What was the participation rate for paid or volunteer preparers?
- Be polite put themselves in your shoes and ask yourself what you would have done.
- Nothing
- Have it to where you do it when u file taxes.
- Brindar más información. "Provide more information"
- Include it in tax preparation.
- Communication
- Reach out to them that they can qualify for certain stuff.
- Hold true to your word of receiving your return in 90 days.
- Keep promoting it via social media.
- Posts on social media.
- Partner directly with organizations that are already doing outreach in the community. I heard about the credit from Head Start and from Habitat for Humanity. I'm sure there are more that would be glad to help get the word out.
- Use social media to inform people that these funds are available.
- Use local employers to encourage their employees to see if they qualify.
- I don't know.
- I think they did a good job. I found out about it watching the news.

- Put it up higher on the credit section, I have never scrolled down to read about all the different credits and tax situations.
- Emails, Facebook.
- Advertise
- Nothing.

## GENERAL QUESTIONS

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

#### **Feedback themes**

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

Sample feedback these include:

- AARP and other partner organizations
- Social media
- Marketing (mailers, billboards, local news/radio, etc.)
- Word of mouth

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

- Email from DOR mailing list – shared with District Manager and then they shared with staff.
- AARP plus Tax-Aide Training
- Much to my surprise when I did my first tax return and it populated.
- Postcard mailers, Commerce partners, billboards, social media, partner organizations word of mouth.
- Thru DOR email that it existed but mostly thru H&R district manager.
- My January and February clients heard about it from me I did not have a lot of people that stated they knew about it.
- Large group of people 5-10% in office visitors – had it auto applied through preparers and didn't know and then they came to organization to apply.
- Through our AARP VITA training.
- I think I received a mailer or email.
- Question: Where did the mailers/flyers get posted?
- Question: Can we reach out to people who may have qualified but did not apply to these folks/
- I think notices in local newspapers and segments on local news and radio stations right before tax season would be helpful.
- Think about additional language outreach expansion.
- Social media, the news, and my emails if I catch it.
- Facebook post
- Online +2
- Por la tele. "For the television"
- IRS
- Website
- When I did my Tax Return.
- Facebook
- A regular person shared about it on reddit in the r/Washington sub.
- Other person
- Habitat for Humanity and Head Start
- The Okanagan community action council from their Facebook website page.
- The article in the local news app.
- Turbo tax



- KOMO news
- I believe it was turbotaxintuit.com.
- Newsbreak
- My job sent it to me in an email.
- Email, news.

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

### **Feedback themes**

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

Feedback themes included:

- Gain an understanding and setup SAW accounts beforehand.
- Watch for EITC credit as an indicator that one may be eligible for WFTC credit.
- Read qualifications prior to starting.
- Just do it; it's not too difficult.

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

- Learn how to create SAW accounts...as the application is the easy side!
- New preparers would just get training on it – nothing specific at the moment.
- VITA and My DOR and paper, online application easy (except of application) – client documents had all the info needed.
- Did have to upload their documents? [KK responded yes, in the application in My DOR.]
- First thing: If you see EITC credit (taxpayer is qualified) then automatically go to WFTC application.
- At VITA + AARP sites, most applicants have required documents based on flyers and communications of what is needed for tax filing. If they don't, typically, they are sent to get them and come back to file.
- Try to get help don't try to do it alone.
- Make sure to read qualifications.
- Que se informen y que tengan paciencia y los preparadores que estes bien informados para que ayuden alas personas. *"That they be informed and that they have patience so that they help people"*
- Have all your Info.
- Be patient.
- Submit the right documents.
- Just apply instead of answering the qualification questions in the beginning. Questions are somehow confusing.
- Stay on top of your application. Call to find out what is the next step because there is little to no communication.
- Apply... there's nothing wrong with it.
- To do it it's not difficult.
- Have the items you need ready at hand when you apply, so you can get the application process done fast and easy. But if you have to log out it will save for you to go back to the spot you were. It took me less than 30 min to fill out.
- Review the application several times. Every client is a case you case basis.
- Do your taxes on time.
- To research all of the current tax credits available for the current year you were filing for.
- Just read everything this site explains it all.
- I don't have anything.
- Nothing

- Have all your personal info ready they ask a lot of questions.
- Do It! Its easy and simple and that extra income was Amazing!
- Be aware of who qualifies, esp. EIC recipients.

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

### **Feedback themes**

The most popular feedback received was for DOR to make sure the “Where is my Refund?” is functioning and kept up to date. It was reported that some had issues with this tool while waiting for their refund. Others suggested shortening the application, as they felt it was too “lengthy”.

Sample comments also include:

- More follow up after application has been submitted.
- Clarification around whether Driver’s Licenses are required or just speed up the process? Also, preparers often only request DL from new clients, so having to loop back to collect around slowed them down in the application process.

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

- Reiterate points application shorter (waste of paper) and add estimated refund to print-out.
- Incredible experience, painless experience, and happy that DOR listens after the program go-live. Would love to have more listening sessions/opportunities to provide feedback.
- Do you have the formula to calculate the credit? [WAC 458-20-285]
- Will it be the same next year? [Yes, same methods and hopefully enhanced with feedback]
- Any plan to expand to more 3rd party software? [Yes, DOR is talking to additional companies this summer to expand.]
- I was thinking of credit \$ (same next year) - [Yes, amounts tied to inflation and consumer index.]
- Ok, I will take a look. If the client income is ZERO, does the client still can claim this credit (since min credit is \$50)? [If earned income is 0, then ineligible.]
- What happens if we don't add the driver's license info? Does it just slow the process down?
- We only get driver's license info for new clients, so it slowed us down having to track down driver's license info for existing clients.
- Are there any specific time frames for applying for WFTC application?
- I think you did a great job considering it was the first year and a new tax credit. Thank you!
- If someone could help me with my situation I would be very greatly. I got a letter about my amended return I had to fix. I called and talked to someone she informed me what to do and to send it to DOR. So, I did actually what she told me to do. Then she said once they got it my 3 stimulus would be mail out to me. Well, I still have yet to receive anything. I could really use that money. Thanks.
- The approval decision process should be online not just mailed.
- Improve the process.
- The process has taken 5 months already when it was supposed to be 90 days. No communication on when the return will hit the bank or information needed in the beginning of the process which could save time.
- No +2
- I didn’t see as much promotion on social media until later on.
- Everything was good nothing to say.

- To new users don't get discouraged with the application process it's easy to use and fast and you get approved right away. It's free funds so don't miss out on this opportunity for your family.
- Thank you for giving us taxpayers who are struggling a chance.
- Not that I can think of.
- Thank you! For offering this service to me. I needed it more then you know.
- Your online refund check should let filers know if their application has been received. I filed one on April 5th and when I checked on the status June 6th it said no application had been received. I had to call to verify that it WAS received and being reviewed.
- Improve a way to track application and review documents that have been sent in.
- Grateful to State of Washington for this additional tax credit at a time when we lost the additional foodstamp benefit!
- There should be a little more follow up after an application has been submitted. I check the status and it always says submitted and nothing else. The page itself for FAQ's is gone. There is always a message at the top saying we will process all by a certain date and that date seems to always change. There is no other available information. I don't know if it's been denied or if there were so many applications that maybe the funds have run out and no more applications will be processed. That way I can delete the confirmation email and stop checking.
- The online checking the status was wonky. I kept trying to enter my information and was told that my application had not been received when it had indeed. I got the credit before anything updated on the website and that cause some worry that I had done something wrong.
- Fix the issue with where my refund is I was told the dollar amount we are told to put in is not working.

### **How would you like to be communicated with?**

The preferred communication method for participants was email.

- Emails
- A webinar of updates and changes if any at the end of the year.
- Misc. messages
- Thank you, great job this year.
- Thank you for providing us the information.
- Email +2
- Website +2
- In January (before tax season), have concise update on changes in training.