

Session	Question/Answer
9am	<p>Q Will class recording be available to sharpen up skills once training is done?</p> <p>A No, we did not record the training sessions</p>
9am	<p>Q Are there any handouts?</p> <p>A The power point presentation has been posted to our website.</p>
9am	<p>Q Would it provide the CE hour as well?</p>
9am	<p>Q For CPAs and EAs?</p> <p>A We provide CPE for CPAs, but this is not an IRS-approved training for EAs.</p>
9am	<p>Q Is the program supporting itself?</p> <p>A The program budget comes from the state General Fund.</p>
9am	<p>Q Client got letter wanting money back. Told to send in return, did that, than got a letter with interest. Online does not work for him anymore, it blocked him.</p> <p>Please instruct your client to contact the Call Center at 360-763-7300 so we can discuss the details of his case. If you would like to speak on his behalf he will need to complete at CTIA.</p>
9am	<p>Q What if the applicant didn't use a paid preparer, and therefore doesn't have a PTIN?</p> <p>A A PTIN is only required if a preparer completed the application for compensation.</p>
9am	<p>Q Are there any exceptions to the physically present test for military personnel that have legal residence in WA but are stationed out of state on government orders?</p> <p>There is no exception to the 183 day residency requirement. The WFTC is a refund of retail sales tax, so a person needs to meet that physical presence/resides requirement in Washington State to be eligible.</p>
9am	<p>Q I have a question I noticed that when the client is under the amount bracket the amount is different for example</p> <p>The credit amounts listed are the maximum potential credits for each household size. The credit has a phaseout, please see WAC 458-20-285, Part 3: Refund Amount.</p>
9am	<p>Q Do seasonal workers qualify? They use their employer address</p> <p>A If they meet the residency requirement, and all other eligibility requirements, they could be eligible.</p>
9am	<p>Q So we have clients submit the application online AFTER we process their return?</p> <p>Yes, unless you are using a tax software that we partner with for Modernized Efile, then you can do it all at once. You can find a full list of our tax software partners at: https://workingfamiliescredit.wa.gov/apply/apply-using-tax-preparation-software</p>
9am	<p>Q can I do multiple applications through my log in or do they each need a log in?</p> <p>You can do them from your login, but your clients should complete a CTIA and attach it with their application. It is best if your client's submit the application with their own login.</p>

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9am	<p>Q Is it going to take 90 days to receive the refund this year as well ?</p> <p>90 days is generally the maximum amount of time, and that is usually caused by a delay in the applicant sending additional requested documents.</p>
9am	<p>Q What number can I call?</p> <p>A The phone number for the Working Families Contact Center is 360-763-7300. We are available from 8 am to 5 pm, Monday thru Friday.</p>
9am	<p>Q as the income thresholds for a single person with 1 dep is \$49,084. the refunds is \$640.00 now the client made \$48,989.00 the refund change a lot</p> <p>The credit amounts listed are the maximum potential credits for each household size. The credit has a phaseout, please see WAC 458-20-285, Part 3: Refund Amount.</p>
9am	<p>Q wHAT IF FAMILY IS APPLING FOR ITINS NUMBERS? IN THERE TAX RETURN THEY DO HAVE A WA ID MEET RESIDENCE IN WA</p> <p>If the applicant is in the process of applying for and ITIN, they can submit and application, but it will not be processed until they submit proof of their ITINs to the Department.</p>
9am	<p>Q does a single mom eligible for WFTC if she didn't work the entire year but survived on child support and got out of the DV shelter after 17 months</p> <p>Applicants must have earned income from work, whether that is an employer or self-employment. Child support is not earned income, so if that was her only source of income, she would not be eligible.</p>
9am	<p>Q Does everyone need to create a separate online account or can you apply for their credit with your own account credentials?</p> <p>You can submit applications from your login, but your clients should complete a CTIA and attach it with their application. It is best if your client's submit the application with their own login.</p>
9am	<p>Q I had a case where my client lived on the grid and has lived in WA state for many years, but all her mail goes to PO Box. How is this resolved for future applications?</p> <p>Applicants are asked to provide both a mailing and residential address. If they do not provide a residential address, they will likely be asked to provide proof of residency.</p>
9am	<p>Q another thing I noticed is that if the person qualify for the WFTC but once they do the application the amount of refund is zero why and what to do for those clients</p> <p>If the amount of refund is \$0, the applicant likely is not eligible based on their income. To have specific eligibility questions addressed, you can contact the Call Center at 360-763-7300.</p>
9am	<p>Q Is the survey demographic at end of WFTC app required? does it delay if not filled out?</p> <p>A The demographic information is voluntary. It does not delay processing of the application.</p>

Session Question/Answer

9am Q IF A TAX RETURN HAS A MISTAKE ON ANY NAME OR LAST NAME OR SSN CAN WE APPLY FOR WFTC WITH THE CORRECT INFORMATION ?

A Applicants should always use their correct information when applying for WFTC.

9am Q How do we make a mydor account and what's required?

A Here is a link to step by step instruction for creating a MyDOR account:<https://dor.wa.gov/manage-business/my-dor-help>

9am Q Can they still apply for previous years?

A Yes, applicants have the original application year, plus three additional calendar years to apply.

9am Q you had a table earlier showing the max credits, threshold etc for tax year 2024 - where is the web site to provide that info?

A here is the link to find that table. <https://workingfamiliescredit.wa.gov/eligibility>

9am Q When will you begin accepting the applications?

A The application season opens on February 1st each year for the prior tax year.

9am Q Does it speed the processing if a Driver License number is included?

A It depends. It's possible it can speed it up, because this is an additional data point to verify identity if needed.

9am Q A que numero hay q llamar para juntas un ITIN con un seguro social, alguien tenia ITIN y ya recibio su seguro Social?

Upon getting your social security number, you must contact the IRS and ask it to rescind your existing ITIN. You need to send a letter to the IRS's ITIN operation with a request to rescind your ITIN number. Be sure to include copies of your ITIN and SSN. The address for the IRS's ITIN Al obtener su número de seguro social, debe comunicarse con el IRS y pedirle que rescinda su ITIN existente. Debe enviar una carta a la operación ITIN del IRS con una solicitud para rescindir su número ITIN. Asegúrese de incluir copias de su ITIN y Seguro Social. La dirección de la oficina de operaciones de ITIN del IRS es:

Internal Revenue Service

ITIN Operation

P.O. Box 149342

A Austin, TX 78714-9342

A It depends why they were denied. If it is because they failed to supply documents, they can simply provide the requested documents.

9am Q IF THE CLIENT FILE 1040X WE SHOULD UPLOAD BOTH 1040 AND 1040X? WILL THIS SLOW THE PROCESS OR REFUND ?

A You should include both with the application as part of the complete federal return.

9am Q What is the amount of earned income needed to qualify for the WFTC?

A Applicants must have earned income of more than \$0.

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9am	<p>Q where can I call for ITIN meeting with soc. security who has an ITIN and has a soc. security for VA</p> <p>A You would need to contact the Social Security Administration. A person who has a SSN cannot also have an ITIN.</p>
9am	<p>Q where I can register as a income tax prep. to help clients with the application or I can use my SAW account to help clients</p> <p>You would have to register with the IRS if you are a paid preparer, or you can get certified to volunteer with income tax prep through the VITA program.</p> <p>A program.</p>
9am	<p>Q If you have a SAW account can you use that?</p> <p>A A MyDOR specific login for SAW is still needed, if you don't have one already.</p>
9am	<p>Q Are flyers available to be requested?</p> <p>You can find flyers and outreach information for the program on our website under the resources tab</p> <p>A https://workingfamiliescredit.wa.gov/resources</p>
9am	<p>Q do we get a certificate about this meeting just wondering</p> <p>A If you requested CPE or CLE credit, you should have received your certificate already</p>
9am	<p>Q What is the amount of earned income needed to qualify for the WFTC?</p> <p>A Applicants must have earned income of more than \$0.</p>
9am	<p>Q What is the max a tax preparer can charge to help clients fill out this application?</p> <p>A DOR does not regulate what can be charged for this service.</p>
9am	<p>Q Have someone who only earned from earned income a job for only two months but got L&I income. is L&I income considered earned income?</p> <p>A L&I income is not earned income.</p>
9am	<p>Q What would be a reasonable fee to charge someone to fill out this application?</p> <p>A DOR does not regulate what can be charged for this service.</p>
9am	<p>Q What's bar number?</p> <p>A Attorney's have bar numbers, so if you are any attorney needing CLE credit we will need your bar number.</p>
5pm	<p>Q How many applicants have itemized their deductions on their federal tax return?</p> <p>A Approximately a quarter of our applications for tax year 2023 had itemized schedules</p>

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5pm	<p>Q Did DOR ask the IRS to find that WA WFTC payments are nontaxable because they are provided are based on a legislatively provided social benefit program for the promotion of the general welfare per IRS Pub 525 at 31.</p> <p>A Applicants must consult with the IRS for this information. We cannot provide federal tax advice.</p>
5pm	<p>Q Do dependent disabled adults count as a qualifying child?</p> <p>Only if they meet the relationship and age requirements. A disabled parent/grandparent cannot be claimed because they do not meet the relationship requirements.</p> <p>A relationship requirements.</p>
5pm	<p>Q AARP Foundation Tax-Aide volunteers funded by the IRS under VITA/TCE grants are not required to prepare a due diligence declaration when preparing a federal return claiming EIC. Do we have to prepare for WA WFTC?</p> <p>A No, only paid preparers are required to complete the form.</p>
5pm	<p>Q Is it possible to get the presentation slides download or by email?</p> <p>A The presentation has been posted to our website.</p>
5pm	<p>Q how do you actually submit it?</p> <p>There are several ways to submit an application. You can apply through tax preparation software that we partner with, through our MyDOR portal via WFTC.wa.gov, or by paper application which can be downloaded from wftc.wa.gov or picked up at a DOR regional office.</p>
5pm	<p>Q Any plans for partnership with ATX software in the future</p> <p>A I am not aware of any plans for that partnership.</p>
5pm	<p>Q If self employed people meet the income requirement are they eligible for WFTC?</p> <p>A Yes.</p>
5pm	<p>Q Our software doesn't figure the actual credit, is there a way to know?</p> <p>You could calculate the credit using the instructions in WAC 458-20-285, Part 3: Refund Amount, along with the applicable tax year information in ETA 3240</p> <p>A in ETA 3240</p>
5pm	<p>Q I know this doesn't have anything to do with this in particular. But I am wondering how to file difficulty of care (tax exempt) on the return??</p> <p>This would be considered a Medicaid waiver payment, so you would indicate that the applicant has special income, and check the box for Medicaid waiver payments.</p> <p>A Medicaid waiver payments.</p>
5pm	<p>Q The IRS is accepting e-filed 2024 returns on January 27th. Can we e-file the WFTC at the same time??? (Because your start date is Feb 1st)</p> <p>A MeF applications can be submitted prior to Feb 1, but the paper and MyDOR applications don't open up until Feb 1.</p>

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5pm	<p>Q is the secure DOR for purposes of the WFTC a separate service to add within SAW?</p> <p>A Yes.</p>
5pm	<p>Q Are 1099 contractors eligible?</p> <p>A Yes, assuming they report their income on their federal tax return as required.</p>
5pm	<p>Q it is based on amount of income is my understanding not how it is earned w2 vs 1099 doesn't matter, correct?</p> <p>A correct.</p>
5pm	<p>sorry I got lost on the residence qualify child, you said That the primary applier needs to be WA residence spouse and children NO? but then you said that if your child live with the applicant in WA for 4 months it is NOT a qualifying child ?</p> <p>The applicant in the example you are referencing was unmarried. In order for the out-of-state qualifying child scenario to apply, the child must be living with the applicant's spouse and they must be filing under the Married Filing Jointly filing status.</p> <p>With online filing through me secure dor (or saw?) does this then mean that any applicant who wants to file online must set up an online</p>
5pm	<p>Q account with DOR?</p> <p>A Yes</p>
5pm	<p>Q Is the income limit based on the Adjusted income or gross?</p> <p>A It is based on both the AGI on line 11 of their 1040 and their total earned income.</p>
5pm	<p>Q If a noncustodial parent had their child more than 183 days can they still get this credit?</p> <p>A As long as the other parent does not claim the child.</p>
5pm	<p>Q New born should be at least be 183 days old to be a qualifying child...</p> <p>A No, they just need to have reside with the parent claiming them for at least half the time they were alive during the tax year.</p>
5pm	<p>IF I HAVE A FAMILY THAT QUALIFIES AND IS UNDER THE LIMIT OF QUANTITY FOR QUALIFICATION. WILL THIS FAMILY RECEIVE THE FULL CREDIT.?</p> <p>The credit amounts listed are the maximum potential credits for each household size. The credit has a phaseout, please see WAC 458-20-285, Part 3: Refund Amount.</p>
5pm	<p>Q is an esignature acceptable for the CTIA</p> <p>A Yes</p>