

# WORKING FAMILIES TAX CREDIT APPLICANT FEEDBACK SESSION REPORT

May 2025





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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 (Revenue/DOR). Now in its third year, it is estimated that up to 350,000 individuals or families are eligible for the tax credit. For tax year 2024, Revenue has received over 296,000\* applications and refunded over \$144.2\* million to qualifying applicants.

In May 2025, the Department of Revenue hosted a virtual feedback session (formally known as listening session) for applicants in the community to share their experience with the Working Families Tax Credit program. During the session, participants were provided with 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.

*\*As of April 30, 2025.*



## FEEDBACK SESSION APPROACH

The applicant feedback session was conducted via Zoom and featured a format with designated roles to include a facilitator, meeting host, interpreters, and note-takers. The session was offered in English and Spanish. Attendees were required to register to attend.

The feedback session was promoted by the WFTC Outreach team, the WFTC email newsletter, direct outreach via email to our applicants, and social media.

During the feedback session, attendees were encouraged to provide their feedback, both verbally and via meeting chat. The feedback session was not recorded. For those unable to attend the feedback session, a survey was available that included the same questions and themes as shared in the feedback session. This survey was offered in English and Spanish.

The feedback session was held on Thursday, May 8, 2025, at 6:00 p.m.

Total feedback session attendees: 11

Total survey responses: 54

Total feedback session and survey comments collected: over 800

In this report, some feedback comments may have been edited to remove unactionable remarks and extraneous personal information.

## SURVEY RESPONSES BY LOCATION

We received 54 completed survey submissions, with representation of various regions in Washington state. In addition, we received responses from locations in the states of Oregon, California, Texas, Arizona and Tennessee.



*Map of Washington state illustrating areas of the state represented in survey responses.*

## FEEDBACK SESSION PARTICIPATION

We had 11 participants in attendance for the feedback session, with representation of various regions in Washington state. In addition, we had representatives from the state of Missouri.



*Map of Washington state illustrating areas of the state represented by participants in the feedback session.*

## KEY FINDINGS

### ABOUT THE PROGRAM (1 OF 2)

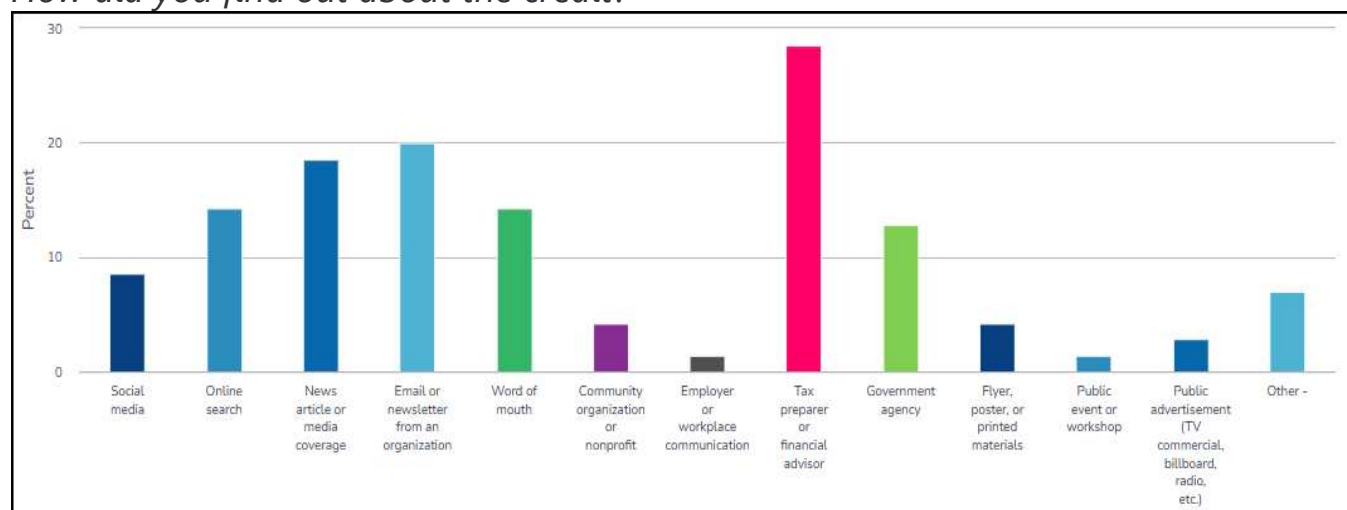
*How did you find out about the credit?*

#### Feedback themes

Responses in both the feedback session and survey indicate most participants found out about the credit through a tax preparer or financial advisor, highlighting the importance of trusted financial professionals in spreading awareness. Other notable sources included email or newsletter communications from an organization and news article or media coverage.

#### Survey responses

*How did you find out about the credit?*




*Awareness sources for the credit.*

#### Feedback session and survey comments

Sample responses:

- Social media x6
- Online search x10
- News article or media coverage x14
- Email or newsletter from an organization x17
- Word of mouth x10
- Community organization or nonprofit x3
- Tax preparer or financial advisor x20
- Government agency x9

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- Flyer, poster, or printed materials x3
  - Public advertisement (TV commercial, billboard, radio, etc.) x3
  - Employer or workplace communications
  - Tax software x2
  - Public event or workshop



## ABOUT THE PROGRAM (2 OF 2)

*What could the Department of Revenue do to encourage and reach more potential applicants?*

### Feedback themes

Responses in both the feedback session and the survey responses suggest increasing advertising and promotion, utilizing tax-related channels, leveraging school and family networks, and engaging in government and community organizations as ways for the Department of Revenue to reach more potential applicants and bring awareness to the WFTC program.

Recommended responses include:

- Continue promoting via social media and tax websites.
- Utilize engaging with government agencies, where there are resources for targeted families.
- Continue collaboration with nonprofit organizations and expand outreach to additional partners. Consider promoting the credit through the 211-phone number-a number widely used resource center operated by nonprofit organizations.

### Feedback session and survey comments

Sample responses:

- Reach out to more nonprofits. Make it easier for working homeless to file i.e. no address possibility or no driver's license.
- Advertise it and or word of mouth. Have businesses/companies who work with low-income families notify them of this credit.
- Apparently, none of my acquaintances were told by their in-person tax preparer at H&R Block about this.
- Post it on social media, send flyers in the mail or send flyers to schools for students to give to parents.
- Get Taxwise to add it to our tax program.
- Make a flyer for clear understanding that this credit is aside from taxes. Many families I talk to are confused to why they would do this after doing their taxes.
- Make sure that the tax preparer in the border states know because the closest to me is across the river in Astoria, Oregon.
- Keep getting information out to social media, tax websites, also the food stamp app called Propel. It has resources for your target families.
- Include families that do not have children at home.
- Postcards to households.

- Put the option on ALL available Tax refund software out there.
- It was just hard to see the status of my return. It always had a \$0 and no date of when it was to be deposited into my account. It was just like one day I got a notification funds were deposited in your account. Just have more info on the status and time of deposit if possible.
- Las redes sociales – *"Social networks"*
- Social media or news
- Hacerles saber del apollo q se está brindando. – *"Let them know about the support that is being provided."*
- Maybe have 211 also be able to check to see if people are eligible and help them sign up, because lots of folks call 211.
- Más información en redes en español. – *"More information on Spanish language networks."*
- Mail email or text people (probably text) let them know there's money available. I told several people who had no idea it existed.
- Make it legally required for government employees and renewal processes to inform people about it.
- DSHS office when applying for benefits.
- Work with organizations to help spread the word organizations like low income preschools to help give that information.
- Perhaps flyers out to day care centers. If there are kids, they most likely qualify!
- Reach out to programs who work with clients who might qualify.
- TV promotion

## APPLICATION (1 OF 7)

*What worked well when applying for the credit?*

### Feedback themes

Responses in both the feedback session and the survey indicate that applicants generally found the application process to be easy. Key factors contributing to this ease included a straightforward application process, support from tax preparers or tax software, and the ability to apply while completing their federal return.


Noted responses include:

- Tax software had WFTC integrated – this is helpful.
- The application flowed so well.
- Previously applied and is not familiar with the process.

### Feedback session and survey comments

Sample responses:

- I worked with AARP. Our software program had WFTC integrated in the system making it easy to use.
- Having the option to apply for it while doing my federal taxes.
- Ease of answering my questions. Ease of applying for it online.
- It was easy to fill out the paperwork and supply the required documentation.
- The amount of support they gave me and my family as well.
- I had applied in the past and knew the process.
- Paper applications
- Nothing seemed to work well. I had to submit an amendment because it said half of my information wasn't entered.
- It was pretty quick, easy to navigate, and good instructions. Also easy to check back, too.
- My tax software (Drake) makes the process simple because the criteria tie into federal credits.
- I don't know if had H&R do my taxes.
- Fui a una oficina local – *"I went to a local office."*
- It was simple and they already had my tax information, the only downside is timing. It takes way too long to process when it was and should have been processed with federal tax. Once those tax refunds are approved then the wftc should be approved as well if eligible for tax credit.
- Mi preparador de impuestos me ayudó – *"My tax preparer helped me."*
- Was a very easy process, straight forward. Clear and concise.
- It went smoothly your website is amazing.

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- Applying online.
  - It's easy to follow the instructions and very specific.
  - Easy to comprehend and follow directions.
  - When everything was filled out correctly, it worked well.
  - Thought tax person was supposed to do it.
  - Mention that it is for folks that get EIC.

## APPLICATION (2 OF 7)

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

### Feedback themes

Responses in both the feedback session and the survey indicate many individuals did not face any challenges when applying, which may be attributed to prior experience or simplicity with the process. However, some respondents reported difficulties, including confusion around the application process or eligibility requirements and issues with online tools, such as tax software attempting to charge a fee or using unclear language that made the process harder to navigate.


Noted feedback responses include:

- Lengthy wait times to receive the credit.
- Tax software, such as TaxSlayer used unclear directions language, making the process more difficult to navigate.
- Difficulty understanding the eligibility requirements and qualifying dependents.

### Feedback session and survey comments

Sample responses:

- Trying to fill out the application for unhoused tax payers and those without phones. Phones were stolen or not available due to interruptions due to nonpayment.
- Not knowing what to expect.
- Honestly I didn't even know I applied for it.
- Trying to learn how to do the whole process.
- Remembering the financial info I needed.
- To see if you qualify.
- Knowing how to apply.
- The tax website I used wanted to charge something like \$30-50 to file, when I could do it for free directly with WA state.
- It often takes a long time for clients to receive their payment and they'll ask me for the updates.
- The TurboTax software I used to file my Federal income tax refund did not let me do the Washington State WFTC credit on it because there was no option on TurboTax for it.
- Poder llenar la aplicacio – *"Be able to fill out the application."*
- Finding my right information on my tax form.

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- La primera vez es más complicado por que no sabes si es real o es fraude por la poca información en mi idioma. – *"The first time is more complicated because you don't know if it's real or a fraud due to the lack of information in my language."*
  - Understanding the income requirements.
  - Not being allowed to complete application.
  - Software needs attention. TaxSlayer wording is a bit confusing. For one thing, Under Eligibility question, when it asks is the mailing address the same as primary address...they need to add (if yes, skip to next page) The software doesn't say that and a lot of tax pros fill out the address anyway making it take more time.
  - Had a question about the differences between EIC and WFTC.

## APPLICATION (3 OF 7)

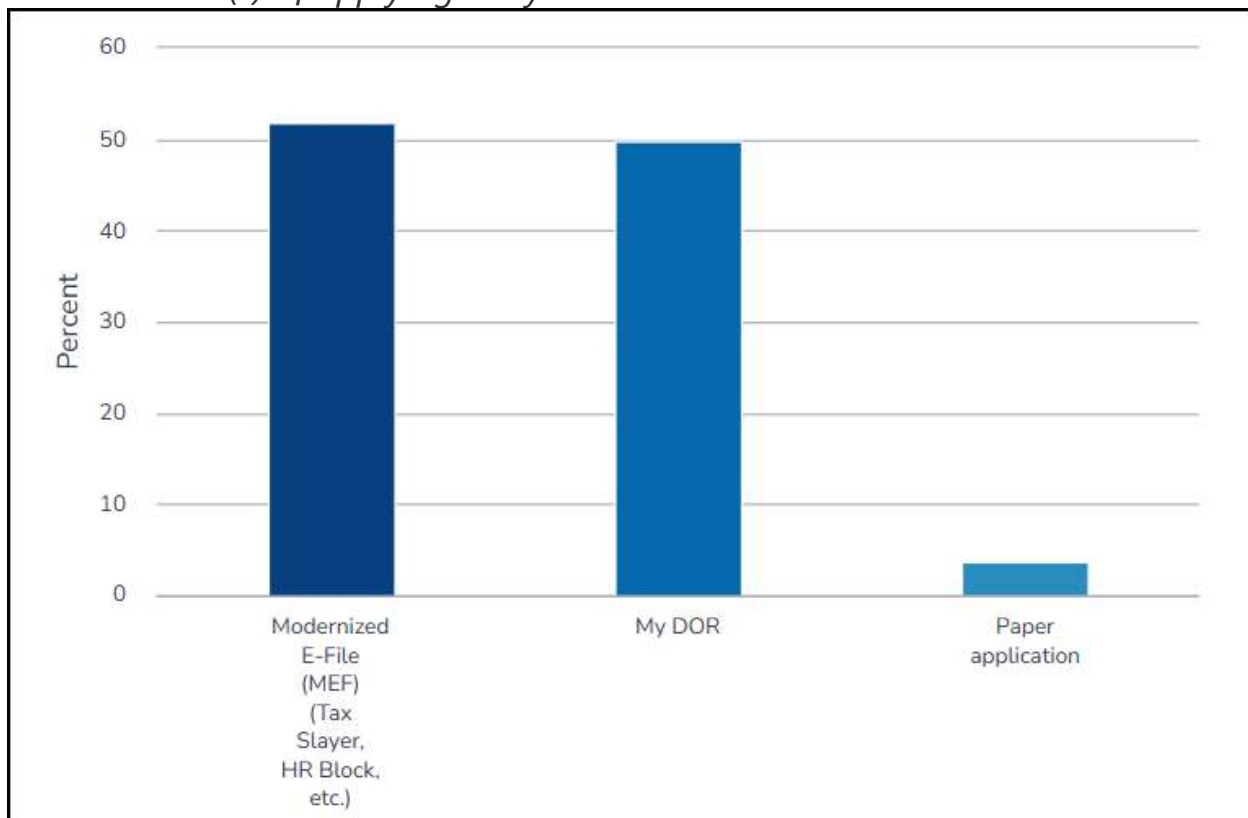
*What method(s) of applying did you use? Why did you select that method?*

### Feedback themes

Responses in the feedback session and survey indicate an even split between modernized e-file (MeF) and My DOR as the most used methods for filing. Paper applications were noted by fewer participants.

### Survey responses

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




*Percentage of methods used to file application.*

### Feedback session and survey comments

Sample responses:

- Modernized E-File (MEF) (Tax Slayer, HR Block, etc.) x27
  - It's how I've always filed.
- My DOR x26
  - It was easiest
- Paper application x2

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- I always use turbo tax and I was unaware it would be at the end of my taxes it offered to have me fill out the application.
  - It was easier to file along with federal taxes this year.
  - Tax Slayer should create wording that matches the actual application. It would be easier.



## APPLICATION (4 OF 7)

*If you applied last year, did you use the same method or a different one this year? Why?*

### Feedback themes

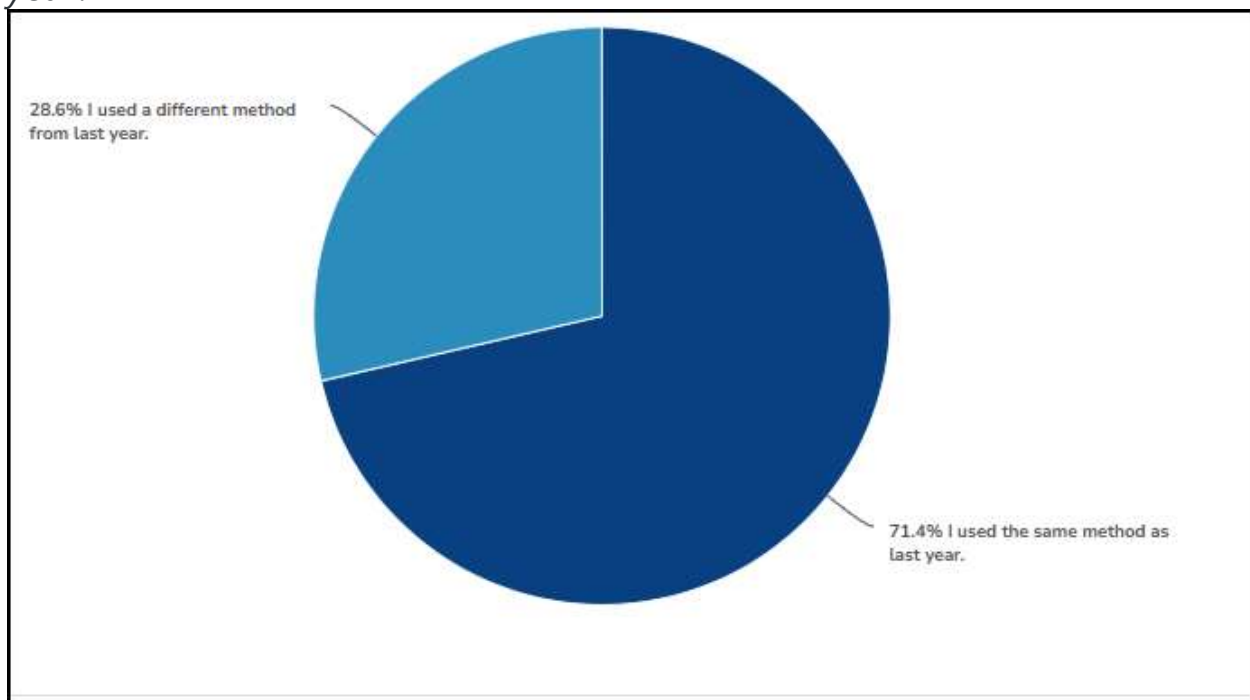
Responses show that most returning applicants used the same application method as last year, while a smaller portion chose to switch to a different one. Many shared that their chosen method was influenced by their tax professional or prompts within their tax preparation software, some of which were unexpected.

Noted suggested responses include:

- Unaware it would pop up on Turbo Tax, but it made it very easy.
- It was an option when filing taxes this year.
- Utilized a tax professional this year.

### Survey responses

*If you applied last year, did you use the same method or a different one this year?*



*Percentage of applicants using the same vs. different filing methods from the previous year.*



## Feedback session and survey comments

Sample responses:

- I used the same method as last year. x35
- I used a different method from last year. x14
- Because it was an option when doing my taxes this year. Last year I had to apply on the actual website for the credit.
- Tax preparer did mine this year.
- I wasn't aware it would pop up on my turbo tax but it made it very easy.
- Because the options changed which made it more convenient for the tax payer.
- Cause Tax Act offered to submit it if I paid an extra \$39.99. Basically ripping people off.
- My tax person did not apply for this fund for me.

## APPLICATION (5 OF 7)

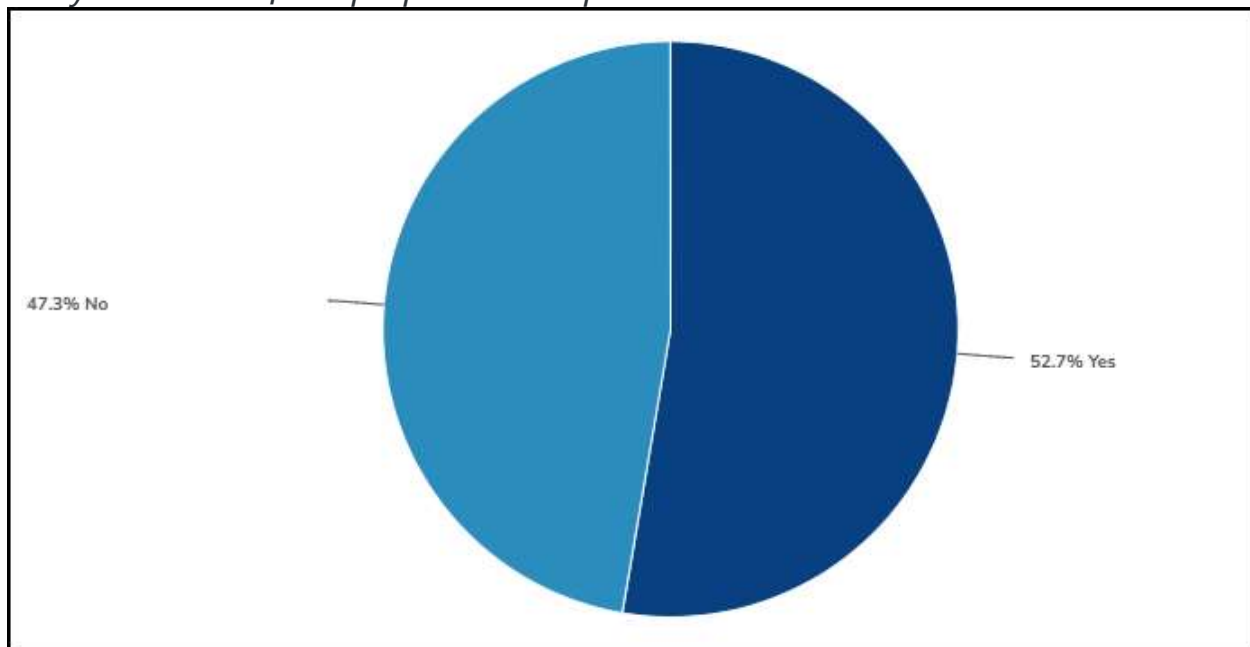
*Are you aware of the prepaid card option? Why did you not choose this option?*

### Feedback themes

Responses in both the feedback session and the survey show that when asked about the prepaid card option, just over half of the respondents say they were aware of it, while nearly as many indicated they were not. Among those who chose not to use this option, many shared concerns about the security of receiving a card in the mail or simply preferred a different payment method. Others noted the inconvenience of leftover balances that are difficult to fully use or expressed a desire to avoid third-party involvement. Overall, there is a shared dislike of associated fees.

### Survey responses

*Are you aware of the prepaid card option?*




*Percentage of applicants aware of prepaid card option.*

### Feedback Session and survey comments

Sample responses:

- Yes x29
- No x26

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- Preferred another payment method. x18
  - Concerns of receiving the card in the mail. x7
  - I hate having weird amounts left on a card that I can't zero out easily.
  - I like to avoid any third party interference in my financial transactions if possible.
  - Most of my clients with refunds are taking direct deposit into a checking account.
  - Just had it go to the same as my federal tax.
  - Preferred Direct Deposit & Already had my bank info...
  - It's simple and faster to be able to just obtain a deposit into bank account.
  - Don't like fees.



## APPLICATION (6 OF 7)

*If you used software to prepare your application, was there anything you would change about that process?*

### **Feedback themes**

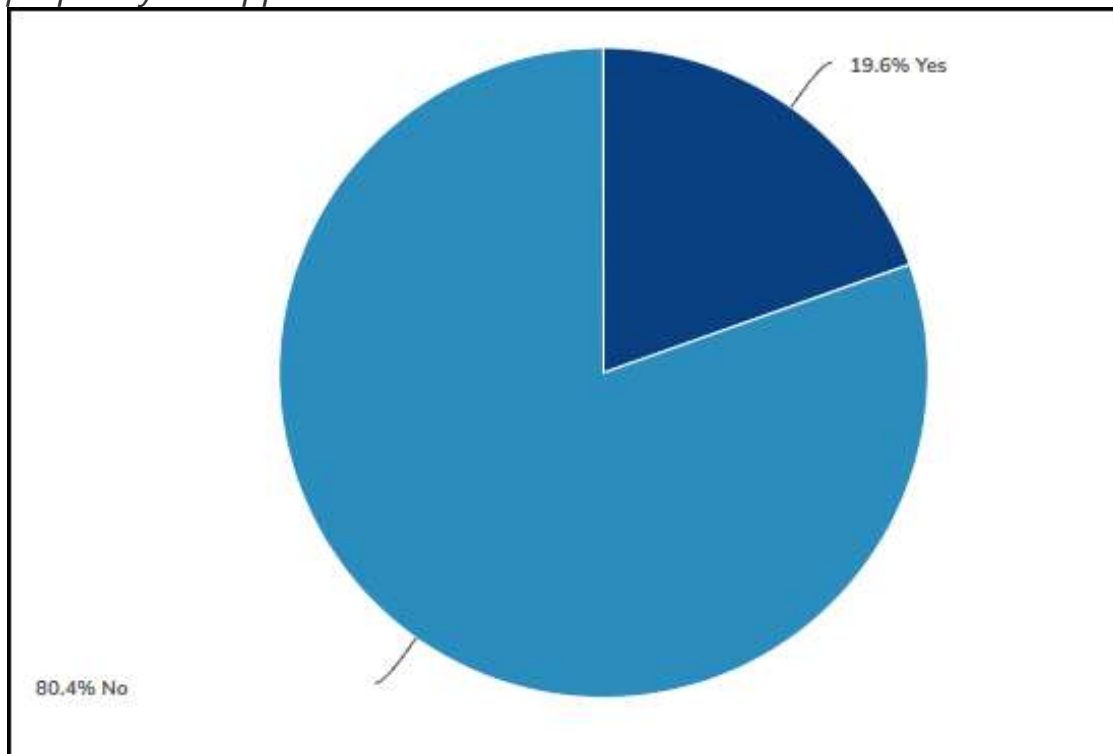
When asked if they would change anything about using tax software to prepare the application, the vast majority said they would not make any changes. However, a smaller number of participants expressed concerns or suggestions that include frustration with the cost of using tax software and concerns about trust in online platforms. Others noted usability issues, including unclear wording and insufficient warnings when critical information is missing in the software program.

Noted suggestions include:

- Suggest that TaxSlayer provide a clearer warning at the end if any information is missing that could prevent the filing.
- TaxSlayer instructions and directions lack clarity.
- Desire for this option to be added to a wider range of tax software platforms.
- The filing costs are considered too high.

## Survey responses

*Was there anything you would change about the software you used to prepare your application?*



*Percentage of applicants that used software to prepare their application and would make a change to the process.*

## Feedback session and survey comments

Sample responses:

- No x41
- Yes x10
- The cost is ridiculous.
- Make it easier to enter information without it saying it's incomplete.
- Remove or at least reduce the amount they charge. Absurd how much it cost.
- There was no option on the software I used...please add it.
- Stop allowing online tax charge customers money to submit on their behalf.
- I guess I would have TaxSlayer give a better warning at the end if in fact something was left off preventing the filing.

## APPLICATION (7 OF 7)

*Based on feedback from last year, we made several changes including making it easier to upload documents (unauthenticated document upload) and improving our online application to reduce errors. Do you have any suggestions to improve the application next year?*

### Feedback themes

When asked for suggestions to improve the application process next year, most participants shared positive feedback, with several stating that the process was easier and clearer than in previous years. Many expressed appreciation for the recent improvements stating they made a notable difference. However, a few participants mentioned the waiting times remain too long and should be addressed moving forward.

Noted responses include:

- Appreciation for the use of a QR code.
- Continue outreach efforts, especially to communities that may not see traditional advertising, such as TV ads.
- Continue efforts to assist individuals with the application process, especially misunderstood or challenging sections of the application.

### Feedback session and survey comments

Sample responses:

- We did not use any upload options with Taxslayer.
- Holy cow make it more accessible...
- A hotline for anyone who has questions or issues with the tax credit.
- Changes you made make things easier.
- Have a live seminar with people there to help people fill out the paper forms.
- No, it was definitely easier this year than last year. Maybe have it connected with out taxes to where we don't have to go back and forth for those who e filed.
- Todo es más facil. – *"Everything is easier."*
- No, todo estuvo más fácil. - *"No, everything was easier."*
- Na it's simple and straightforward to understand. But for others who might struggle maybe show an example of how to submit documents. A visual they can follow or a short tutorial of submitting documents. Or also for other common struggle areas a simple example or to help guide.
- I liked the QR code, I think another year and more people will be aware of the credit and more will apply. Reach out to communities that may not see the ads on TV.
- Involving community groups and organizations. Slavic populations.

## WORKING WITH DEPARTMENT OF REVENUE (1 OF 2)

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

### Feedback themes

In both the feedback session and the survey, feedback shows that applicants used multiple channels to communicate with DOR when they had questions. Common methods included visiting the DOR website, calling by phone, sending emails, and checking their My DOR account. Some turned to external support, such as their tax preparers. While many participants said they didn't need to seek additional information- others shared challenges in getting timely updates or reaching someone at DOR directly.

Noted responses include:

- Suggestion to provide a specific date or clearer timeframe on the website, rather than a general "within 90 days" message.
- Phone lines were typically busy, and it was hard to get a call back.
- DOR was efficient and helpful when they responded.

### Feedback session and survey comments

Sample responses:

- Only checked the status on the website. x2
- Didn't have a clue of where to go...
- Via email x4
- It would be great if it said more than "within 90 days" because I don't remember when I applied, so I have no idea when my 90 days is.
- Through my IRS / DOR account.
- Lines were always busy or hard to get a call back.
- They were on it. Response to questions came very quickly.
- HR Block helped me.
- Called x8
- Letters from DOR
- Website x7
- That's were it didn't show status or anything just got deposited with no time frame or date.
- Fui a una oficina local en mi ciudad. – *"I went to a local office in my city."*
- Just sent a message via contact us.
- Mi preparador me dio la información una página para investigar mas. – *"My preparer gave me a page of information to investigate further."*



## WORKING WITH DEPARTMENT OF REVENUE (2 OF 2)

*Did you use any of the following tools?*

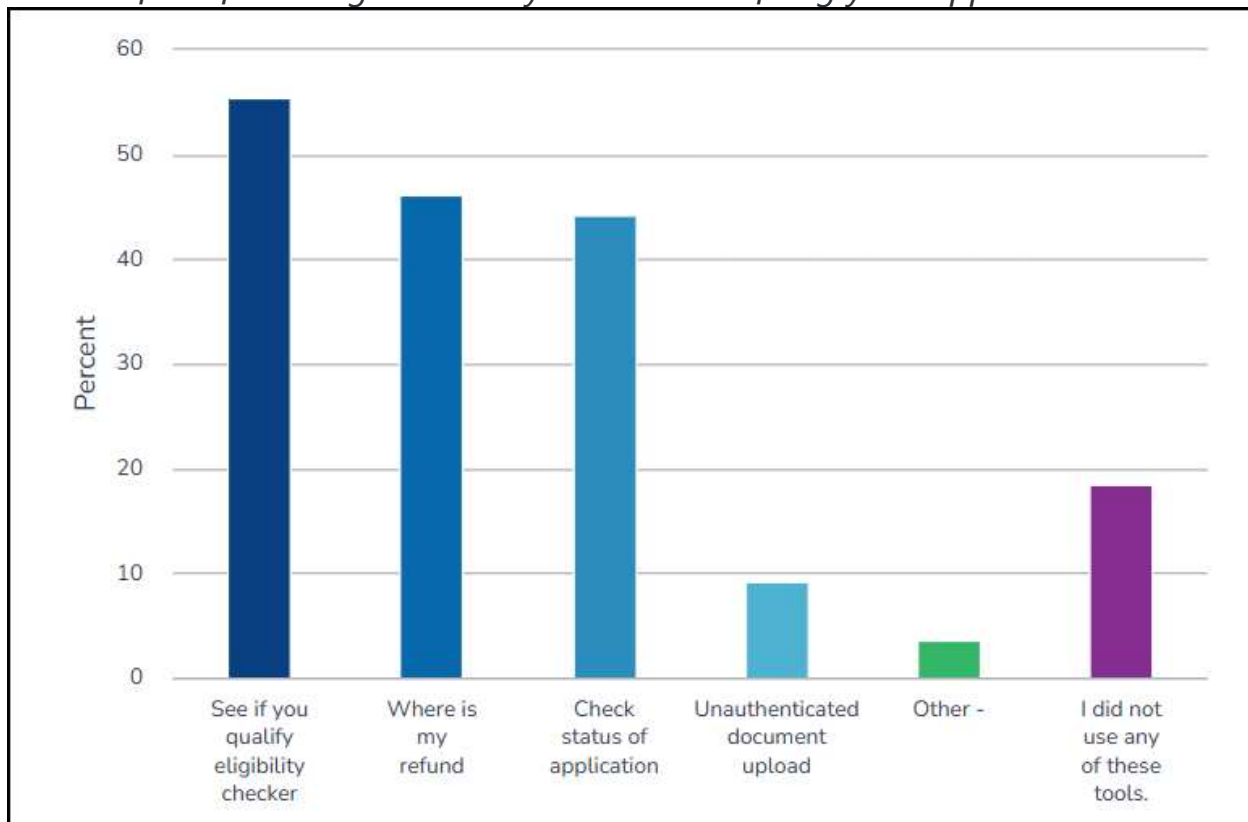
- *Where's my refund and check my status of an application tool*
- *Unauthenticated document upload tool*

### Feedback themes

Participants report using a variety of the tools, with the "See if you Qualify" eligibility checker being the most used. Overall, feedback on all the tools was positive. Several people commented that the tools were helpful and easy to use.

### Survey responses

*Which of the following tools did you use when filing your application?*



*Percentage of tools used when filing the application.*



## Feedback session and survey comments

Sample responses:

- See if you qualify eligibility checker x30
- Where is my refund x25
- Check status of application x24
- Unauthenticated document upload x5
- Tax prep software x1
- I did not use any of these tools x10
- Me alludaron en oficina local d serca d mi ciudad. – *“They helped me at the local office near my city.”*



## GENERAL QUESTIONS (1 OF 3)

*Are you aware that you can still apply for the credit for tax years 2022 and 2023 (in addition to tax year 2024)?*

### **Feedback themes**

Responses in both the feedback session and the survey indicate mixed responses to this question. A portion of participants state they were aware you could apply for tax year 2022 and 2023 in addition to tax year 2024, as they have done so. Some participants were surprised to learn they could apply retroactively and welcomed the additional time. A few respondents expressed confusion about their eligibility or how to apply for previous years.

### **Feedback session and survey comments**

Sample responses:

- Yes x38
- No x23

## GENERAL QUESTIONS (2 OF 3)

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


### Feedback themes

Responses in both the feedback session and the survey participants offered a wide range of advice for first-time applicants. The most common encouragement was simply to take the step to apply and then be patient while you wait. Some emphasized the importance of consulting a tax preparer for assistance while others advised on watching tutorial videos and utilizing the website resources to familiarize oneself with the process before beginning. Overall, the message was strong to “just do it” and take advantage of help to make the process smoother.

### Feedback session and survey comments

Sample responses:

- Use it. Have your WA driver's license.
- It's worth it if your struggling financially.
- Be patient
- Make sure they ask their tax preparer for any and all credits.
- Have a tax preparer assist you in filing your taxes.
- Get the prepaid card and keep track of all paperwork received.
- Go slowly and read the eligibility section so you can be prepared with everything you will need.
- Try even if you think you are not eligible.
- Follow instructions to the letter and file early. Earliest time of return is 6 weeks. Can take longer if you do not provide needed documents.
- It's definitely worth it and is simple to apply.
- Use the Washington state website, not the tax website you use for your IRS filing.
- More information as to what we need to do in regards to first-time applicants.
- Just to make sure clients understand that federal refunds are on an entirely different schedule than the state refund.
- Go to H&R block
- Check if your qualified first because sometimes it sounds bigger than what it is and it's fairly equal to all families on getting approved.
- Make sure to ask question if you are doing alone.
- Q llenen correcta mente su aplicación y q agan sus impuestos para q sea más rápido el proceso. – *“Please fill out your application correctly and do your taxes to speed up the process.”*
- Complete application early to get money soon.

- 
- Que investiguen más o preguntar a su preparador de impuestos. –*“Do more research or ask your tax preparer.”*
  - Definitely have documents ready for a faster process and ask questions if unsure. Some tax experts are able to submit this application if you ask.
  - Make sure you have completed your federal tax return prior to filing the WFTC.  
x2
  - Access the website and listen or watch webinars to help to get started.

## GENERAL QUESTIONS (3 OF 3)

*Anything else you would like to tell us?*

### Feedback themes

Responses in both the feedback session and the survey indicate positive responses for the Working Families Tax Credit and are hopeful that the program continues. Some folks mentioned they are still in the waiting process for their credit and are anxiously awaiting the credit.

### Feedback session and survey comments

Sample responses:

- I applied for my 2024 tax credit and never received it, even though I opted for the direct deposit option. I had 2 letters sent to me saying I was suppose to received it on March 22nd and nothing happened.
- Thank you for making this an easy process.
- Thank you to so much for continuing this program, it is a lifesaver for our family!
- Please continue with the wonderful WFTC program for many years to come..it has helped me out a lot. And not to mention- not many other states do this wonderful type of program except Washington state..Washington state is the best!
- No just thank you for your time.
- I love that Washington has this credit for low income families and I hope it continues.
- Es todo muchas gracias. – *"That's all. Thank you very much."*
- Todo muy bien y an mejorado mucho en su página gracias. – *"Everything is going very well and they have improved a lot on your page, thank you."*
- I appreciate your program and your department.
- Just please try and speed up the time it takes to get your refund 🙏 I'm struggling waiting for mine!!! Thank you.
- Improve the time there refund is given and update by phone text message so one doesn't have to check the website to see the statues of the application.