

WORKING FAMILIES TAX CREDIT TAX PREPARER 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.

To effectively promote access to the WFTC, the Department of Revenue (Revenue/DOR) collaborated with tax preparers (both professional and volunteer) to provide support and assistance to eligible families during the application process. Tax preparers played a crucial role in assisting clients with the WFTC application process. Many federal income tax preparation software companies have incorporated Washington's WFTC application to their modernized e-file (MeF) systems, and often, WFTC application filings occurred with a federal tax return filing.

In May 2025, the Department of Revenue hosted two virtual feedback sessions (formally referred to as listening sessions) for tax preparers to discuss their experiences with the WFTC application process. During these sessions, preparers had the opportunity to provide feedback on highlights and challenges they encountered while completing the application process. They also offered advice and feedback to Revenue and other first-time preparers.

The input received will help drive changes that will improve and guide future processes within the WFTC program and application process.



FEEDBACK SESSION APPROACH

Tax preparer feedback sessions were conducted via Zoom and featured a format with designated roles to include a facilitator, meeting host, interpreters and note-takers. Each session was offered in English and Spanish and covered the same questions. Attendees were required to register to attend.

Feedback sessions were promoted by the WFTC Outreach team, the WFTC email newsletter, social media, and a distribution list of professionals who attended the WFTC Tax Preparer Training held in January of this year.

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

The feedback sessions were held:

- Tuesday, May 6, 2025, at 10:00 a.m.
- Thursday, May 15, 2025, at 2:00 p.m.

Total feedback session attendees: 17

Total survey responses: 19

Total feedback session and survey comments collected: over 200

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

SURVEY RESPONSES BY LOCATION

We received 19 completed survey submissions, with representations of various regions across Washington state, as well as responses from Oregon, California, Texas, Florida, Kentucky, Indiana, and Massachusetts.



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

FEEDBACK SESSION PARTICIPATION

We had 17 participants in attendance for the feedback sessions, with representation of various regions in Washington state. In addition, we had participants join from the states of Oregon, Idaho, Missouri, and Illinois,



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

KEY FINDINGS

ABOUT THE PROGRAM (1 OF 2)

How did you find out about the credit?

Feedback themes

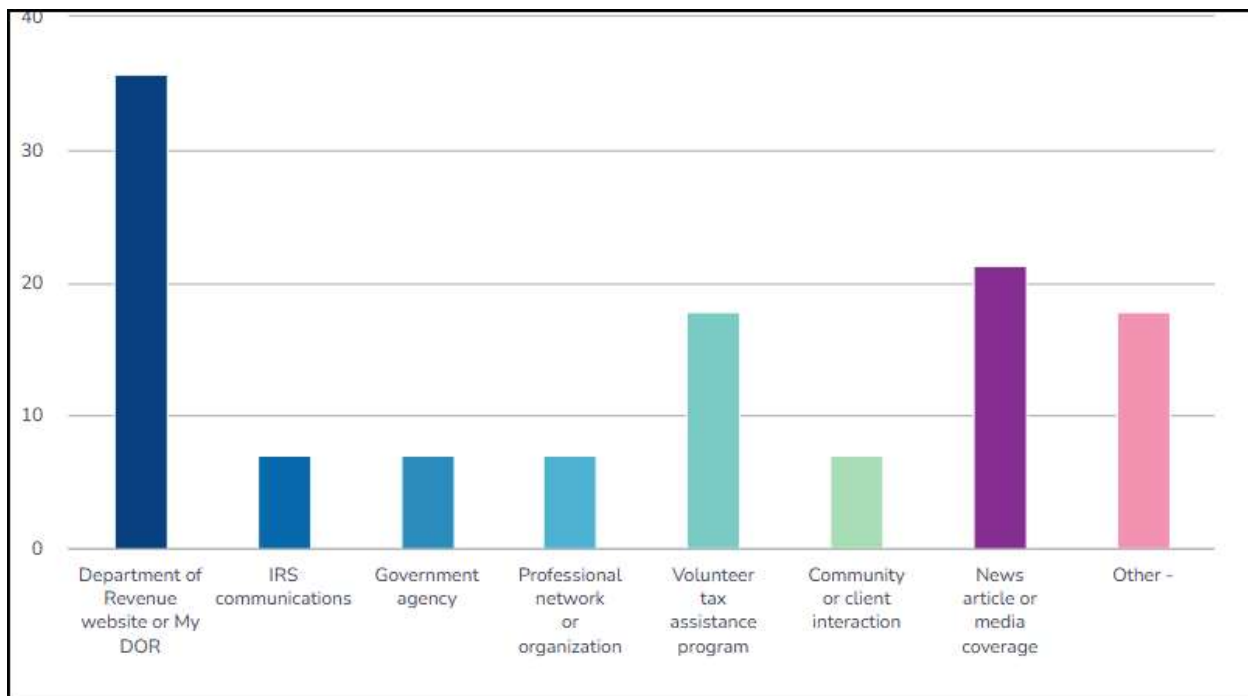
Responses in both feedback sessions and the survey indicate that preparers learned about the credit through a variety of sources. Many discovered it while using the Department of Revenue's website or My DOR portal, while others became aware of the credit through news articles or media coverage, showing that broader public communications are effective.

Noted responses include:

- Part IRS VITA training and included TaxSlayer Pro software preparation

Survey Responses

How did you find out about the credit?



Awareness sources for the credit.

Feedback session and survey comments

Responses are the following:

- Department of Revenue website or My DOR x10
- News article or media coverage x6
- Volunteer tax assistance program x5
- Community or client interaction x2
- IRS communications x2
- Government agency x2
- Professional network or organization x2
- Department of Revenue email
- Signs
- WFTC Grantee
- Online
- Part IRS VITA training and included TaxSlayer Pro software preparation.
- Email
- Advertising
- Through Drake software
- Job/Careers Fairs
- Any indication why ITIN filing is so low?

ABOUT THE PROGRAM (2 OF 2)

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

Feedback themes

Participants shared several ideas for how the Department of Revenue could reach more potential applicants for the credit. Many emphasized the importance of earlier or more frequent outreach with tax preparers, noting that some material and communications arrived too late in the year (tax season) to be effective. Similar suggestions included strengthening direct communication with tax professionals.

Recommended responses include:

- Provide marketing assistance to VITA sites and organizations such as PIM Savvy.
- Send communications directly to accountants, as they arrived too late this year-had to refer to last year's flyers.
- Collaborate with state agencies that already serve low-to-moderate income working families and individuals to better reach the target audience.

Feedback session and survey comments

Sample responses:

- Send WA family flyers out to connected accountants. They came in so late the poor families returns were already done by the time I received them. I used the prior year flyer to give them a contact info.
- I'm sure you already are informing the agencies that would see this population, ie SNAP and childcare centers, etc.
- Local TV/radio advertising Social Media ads.
- Allow grantees that have VITA sites and/or offer ITIN application services a bigger budget.
- Send out mailers to families w/children.
- Provide marketing assistance to VITA sites, like united way, that help people apply for the credit. Knowing how to apply and navigate the process is complicated for most individuals that are in the target demographic of the credit, and having people know VITA sites can help them get their deserved credit would be easier in my opinion than trying to get more people to independently apply.
- Continue to work with funding outreach organizations like PIM Savvy to reach underserved.
- Flyers in the local libraries next to IRS forms.
- Provides ideas or suggestions to Tax Preparers.
- Letters to potential applicants, flyers, signs, social media

APPLICATION (1 OF 6)

What worked well when applying for the credit?

Feedback themes

Responses in both feedback sessions and the survey indicated that the application process for the credit is working well overall and is generally seen as user-friendly and accessible. Many participants described the process as easy to complete, especially when using tax preparation software or services like H&R Block, which helped streamline the experience. The ability to e-file returns was also highlighted as a significant advantage.

Noted responses include:

- The fillable PDF and online application were effective tools for assisting clients.
- Promoting VITA sites is important to ensure clients don't pay unnecessarily for assistance with applications.

Feedback session and survey comments

Sample responses:

- The clients did it.
- Questions in tax app are confusing.
- The application works well.
- The system is user friendly. I do have a complaint on the distribution of the funds through US Bank Relicard.
- Our programming at H&R Block makes it easy. x2
- My tax software, this year added the ability to e-file returns - big help!!!!
- It works well applying for WFTC in TaxSlayer which is what VITA sites use. It also works well using the fillable PDF or helping clients navigate applying online. This was what we did if people already filed their taxes elsewhere. VITA sites help people free of charge so it is ideal to promote VITA sites so clients don't end up paying for help applying for WFTC and to file their federal taxes.
- I am an EA and I have taken your class already. I was unable to transfer the credit for my PTIN for my required CE hours.
- Application is easy and simple to fill out.

APPLICATION (2 OF 6)

What was the biggest challenge applying for the credit?

Feedback themes

While many participants reported that this year the application process was easy and seamless, there were still challenges noted by some. A couple respondents experienced confusion or technical issues with TaxSlayer, leading some people being told they did not qualify and then later having to reapply online. Additional concerns included delays or lack of clarity around refund timing, correcting address errors, and some customers not feeling comfortable with completing demographic information.


Noted responses include:

- Prohibitive to some if they didn't have a SAW account.
- Hard to identify tax year on application.

Feedback session and survey comments

Sample responses:

- The application needs to be more streamlined.
- No challenge it was receiving my relicacard. I had to call 3 times and was charged 20.00 from my refund as they did not have my apt number correct and it was frustrating to spend time on the phone.
- I guess not knowing when I would get the money. I applied via DOR website through a link in my work e-mail. Not sure when I will get it or if it was applied to my tax return.
- None for me. However, if someone wanted to do it themselves and didn't have a SAW account, it was prohibitive to them. Often, they just asked me to do it for them because of that.
- When people already filed their taxes and only need help with the WFTC, it can be cumbersome for people to file by paper or figure out how to apply online and upload documents.
- Was unable to receive credit because no IRS CE credit class number was given on my Working Family document00.
- Complicated to understand if an individual qualifies. Like the EITC at the federal level, often many people who are the beneficiaries are not always in a position to understand tax complexities.
- Questions in TaxSlayer pro are confusing, like residency.
- People w/ITIN don't feel confident doing their taxes, because their immigration status is different.
- Too bogged down with federal taxes and extensions. Need to do some research.

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- Identifying the year of the application, credit taking it longer than 90 days, customers not comfortable completing the demographic section.
 - Glitch in TaxSlayer software suggested that people did not qualify, had to reapply online.
 - Perhaps giving priority to process apps to those who enter demographic information.

APPLICATION (3 OF 6)

If you used a tax preparation software, what changes would you like to see made to that software to make the WFTC process easier?

Feedback themes

Responses in both feedback sessions and the survey indicate that tax professionals who used tax preparation software, particularly at VITA sites, would like to see improvements to streamline the application process in the future. Specifically, feedback noted that TaxSlayer does not always transfer all necessary information into the WFTC application, which can lead to errors or duplication in effort.

Noted responses include:

- VITA sites were instructed by the IRS not to collect demographic data at the start of the tax season.
- Improve integration between TaxSlayer and application, noted some questions are repeated in slightly different ways.
- ProSeries does not automatically mark a dependent under 18 years old as a student by default, which causes frustration for some users.

Feedback session and survey comments

Sample responses:

- I use Intuit Pro Series and this year they added the ability to efile - All required info was transferred to WA return.
- The client's home address and email address did not pull forward to the WFTC application in TaxSlayer and they needed to be manually entered again. The names of the dependents did. If the children's names can pull forward it seems like the other info could be too. That would prevent errors. Also, the IRS asked VITA sites at the beginning of the tax season to NOT ask for demographic info. So we had to just say Prefer Not to Answer on the WFTC demographic pages.
- Better integration to VITAs tax slayer. Many questions have to multiple times, or in slightly different ways (i.e. race/ethnicity) which takes more time away from people coming into VITA sites, and it is just due to the required complicated/uncoordinated data entry, rather than complex tax preparation.
- Transfer address data from federal return (TaxSlayer), had to retype that every time.
- ProSeries would not mark a dependent as a student if less than 18 y/o by default, a bit frustrating.

APPLICATION (4 OF 6)

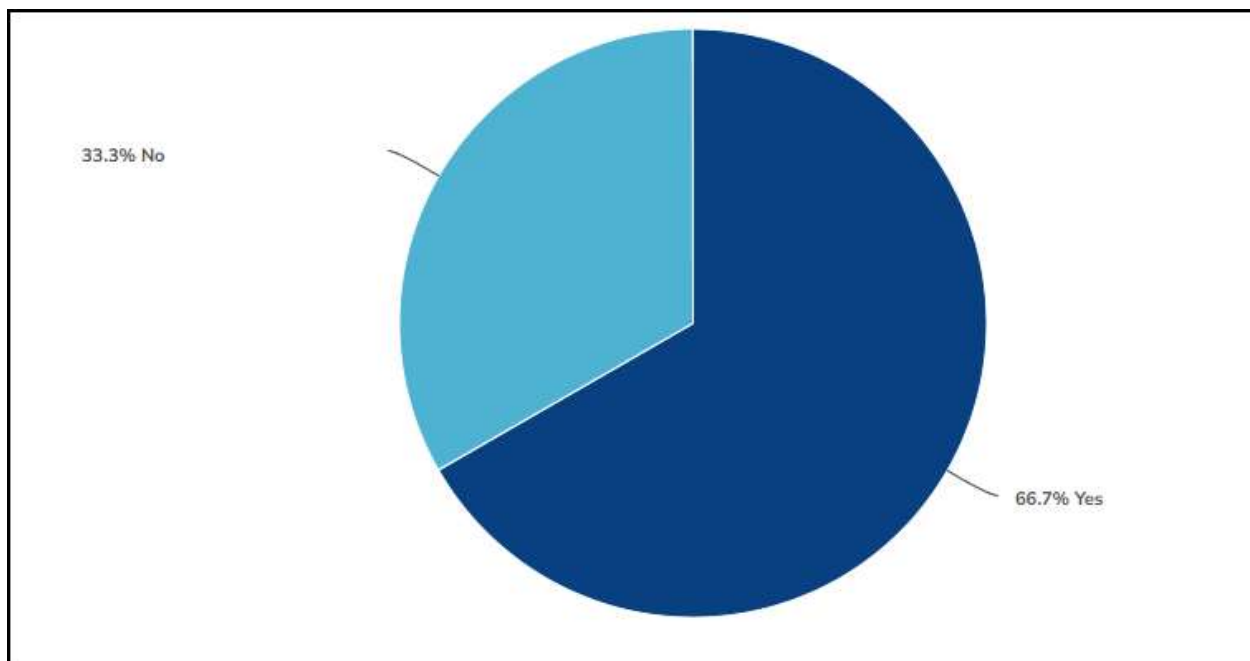
Are you aware of the prepaid card option?

Feedback themes

While most respondents were aware of the prepaid card option, a notable portion shared they were not familiar with it. One person specifically mentioned they did not believe the option was available on TaxSlayer Pro, which may have contributed to some clients not selecting it.

Survey responses

Are you aware of the prepaid card option?



Percentage of tax preparers aware of prepaid card option.

Feedback Session and survey comments

Sample responses:

- Yes x12
- No x6
- I don't think that was available on TaxSlayer Pro.

APPLICATION (5 OF 6)

If your client did not choose the prepaid card option, what was the primary reason?

Feedback themes

Responses in both feedback sessions and the survey suggest that clients most often did not choose the prepaid card option because they preferred other payment methods, such as direct deposit. Many expressed concerns about potential fees associated with the prepaid card, as well as the risk of it being lost or delayed in the mail. Some were unaware that prepaid cards were an option, and a few highlighted concerns about limitations tied to how the card could be used.

Noted responses include:

- One person who selected the prepaid card option reported a negative experience, noting it required multiple phone calls and a fee to have the card expedited, which still took several days to arrive.

Feedback session and survey comments

Sample responses:

- Preferred another payment method. x8
- Unaware of the option at the time. x4
- Concerns of receiving the card in the mail.
- Concerns of cost or limitations. x2
- I chose it and it was a nightmare. It took 3 phone calls and cost me 20.00 of my refund to get the card overnighter and that took 3 days!
- All wanted the direct deposit to same account as their Federal return.
- Direct deposit was the most requested. Worried about fees on the prepaid card or it being lost in the mail. People prefer checks over prepaid cards due to worry of bank fees.

APPLICATION (6 OF 6)

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

Responses in both feedback sessions and the survey highlight several opportunities to improve the online application for next year. Participants suggested making the application year more visible to reduce confusion during the filing process. Continued outreach to ITIN holders was also recommended to help ensure broader awareness and participation. In addition, better integration by tax software used by VITA sites was noted.

Noted suggestions include:

- Clearer communication regarding payment timelines.
- This year's process was smooth and effective.

Feedback session and survey comments

Sample responses:

- The timeline to payment needs to be more clear. I applied in February and have had no communication.
- This was great addition this year.
- I did use the on-line application for a few clients who filed for a prior year return (23 & 22). I did not do their Fed returns for those years so I had to scan and upload their Fed return with the application. I found the on-line app easy to use.
- Make it easier to integrate with VITA sites. They already target the population most likely to take the credit and having the state invest additional help would hopefully increase usage of credit.
- More outreach to ITIN holders
- Is there any charge when recipients use PPDC?
- Make the year of the application more noticeable, uses ProSeries software, has used My DOR.

WORKING WITH DEPARTMENT OF REVENUE (1 OF 2)

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

Feedback themes

When tax preparers needed support, most reported reaching out to the Department of Revenue by phone or email. One person mentioned using secure messaging and another attended DOR's online seminars at the beginning of the year, describing them as very helpful.

Additional responses include:

- Letter from Revenue outlining income requirements was useful; however, it arrived in late March, after many clients had already filed.
- Phoned Revenue multiple times, but received different answers each time, leading to confusion and frustration.

Feedback session and survey comments

Sample responses:

- I get most off website, sometimes phone or email.
- Phone calls x3
- I appreciated receiving the letter from Dept of Revenue with the income requirements chart except it arrived in late March. Most of my clients who qualified had been in by then. It would be nice to receive this letter in early January.
- Email worked great response x3
- I attended one of the DOR's on-line seminars at beginning of year and found it helpful. I also had one issue uploading a return and contacted the DOR - they were very helpful and helped me resolve the issue. I prefer the personal contact versus on-line blogs.
- Called them, but did not necessarily get the same answer to my question.
- I received faster information through secure messaging. It is very quick, and I respond the same way.

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

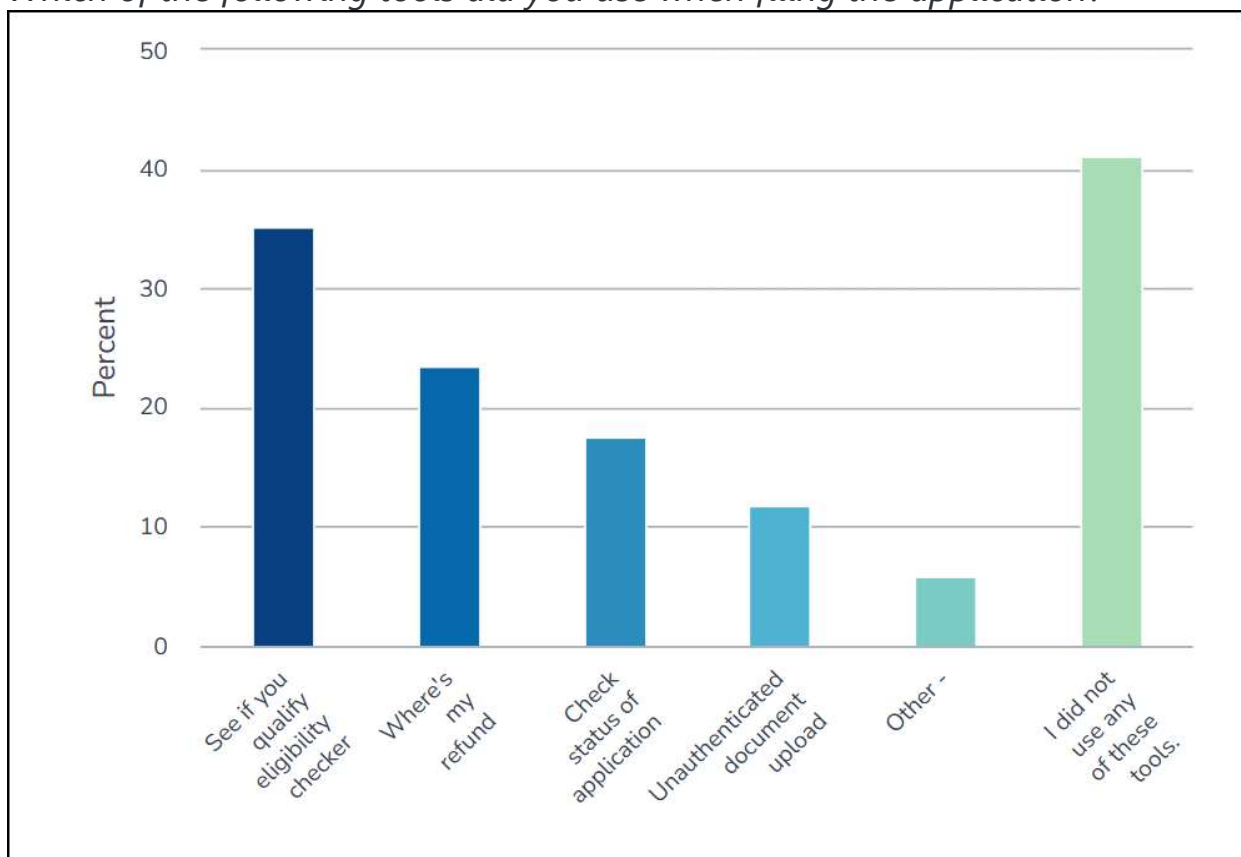
There was a wide range in which tools were used during the application process. Some preparers reported they did not use any of the tools, while others actively utilized several. The "Where's my Refund?" tool was highlighted as particularly helpful for clients tracking the status of their payments and for tax preparers supporting those inquiries.

Noted responses include:

- "See if you qualify" in Ukrainian and Russian would be helpful.

Survey responses

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



Percentage of available tools used by tax preparers.



Feedback session and survey comments

Sample responses:

- See if you qualify eligibility checker x6
- Where's my refund x5
- Check status of application x3
- Unauthenticated document upload x2
- My tax software – Intuit ProSeries
- I didn't use any of these tools. x7
- "See if you qualify" in Ukrainian and Russian would be helpful.

GENERAL QUESTIONS (1 OF 3)

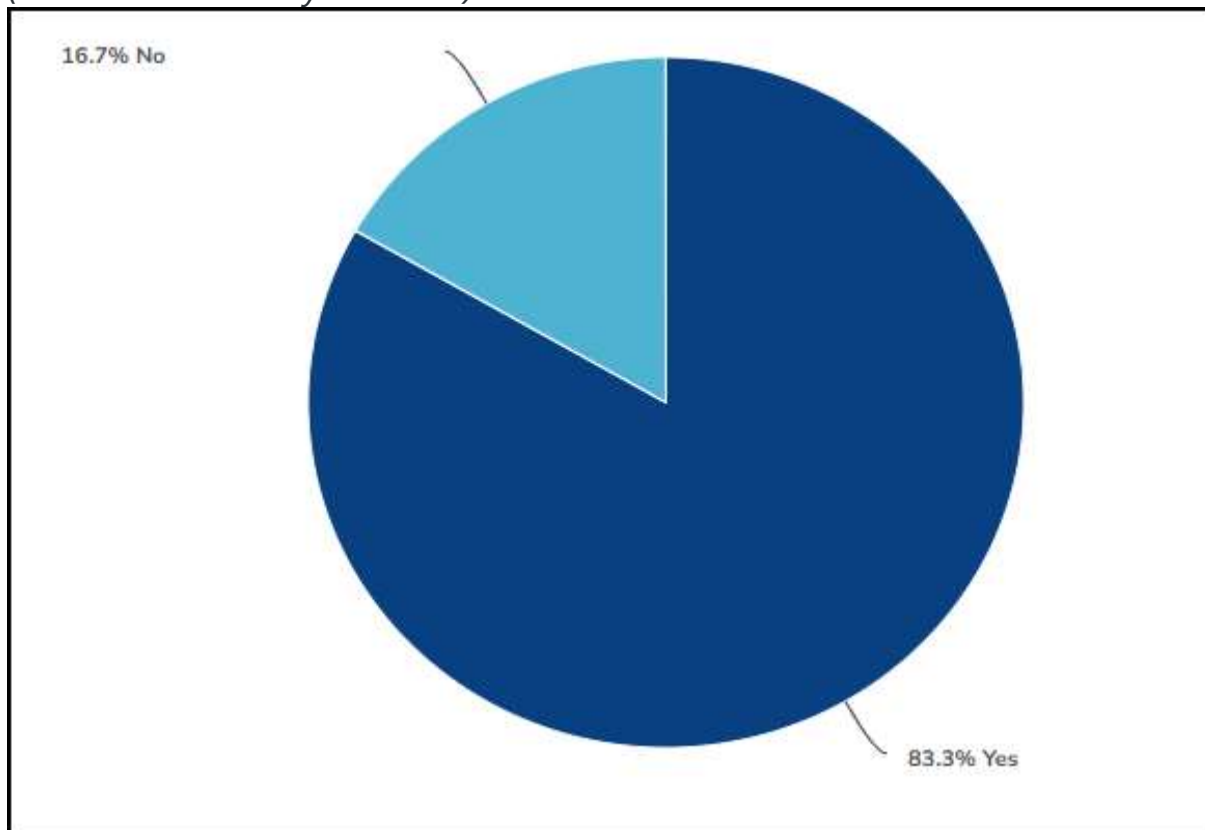
Are you aware that applicants can still apply for the credit for tax years 2022 and 2023 (in addition to tax year 2024)?

Feedback themes

Responses in both feedback sessions and the survey overwhelming indicate that the vast majority of participants were aware of the ability to apply for the credit for prior years. Multiple preparers noted that they filed for previous years on behalf of their clients this year.

Survey responses

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



Percentage of awareness that individuals can apply for the credit for previous years.



Feedback session and survey comments

Sample responses:

- Yes x19
- No x4

GENERAL QUESTIONS (2 OF 3)

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

Feedback themes

When asked what advice preparers would give first-time applicants or new preparers, participants emphasized the importance of first confirming that clients are eligible for the credit. They also encouraged patience and recommend thoroughly reading instructions before beginning the application. Utilizing direct deposit as the most efficient option for receiving payments was also noted. Preparers advised using software that supports e-filing and suggested working with VITA site volunteers whenever possible.

Feedback session and survey comments

Sample responses:

- Be prepared to wait and get no answers.
- Have a bank account and have your refund directly deposited!
- Read instructions
- It's worth it!
- Be patient
- Applicants - If eligible file it! Preparers - Use a software package that integrates the e-filing - saves a lot of time.
- Have the WFTC flyers handy on your desk in multiple languages. Show the flyer and explain about WFTC and what amount they appear to qualify for. Give them a copy of the flyer in their preferred language. Tell them when to expect the refund and that it will be a separate refund than their federal refund and will likely come weeks after the federal refund. If someone doesn't qualify, still tell them about WFTC and ask them to share information with friends or family that may qualify. Make sure to explain to people that each year they should check because if they did not qualify one year they may the next. Set up resource tables and community events and get the word out about WFTC. Offer help year-round. Get the message out to your community partners to amplify your reach.
- Let Tax Preparer know what the state is doing before tax season.
- Get help from a VITA site volunteer.
- Get educated and apply, it's your money.
- DOR staff is helpful and informative, every time I've called it's been a pleasure.
- New preparers- it's a new revenue source.
- Overall my clients and I as a preparer have had a great experience with this program. Thank you for everyone excellent work.

GENERAL QUESTIONS (3 OF 3)

Anything else you would like to tell us?

Feedback themes

Responses in both feedback sessions and the survey reflect a clear desire for more timely communication and materials from the Department of Revenue. Participants expressed appreciation for the website, the program itself, and the helpfulness of the staff. However, some shared frustration with delays in receiving answers to questions, and one reported a negative experience with the prepaid card option.

Feedback session and survey comments

Sample responses:

- It would be helpful to not have to wait months for an answer.
- Overall seamless filing. However the return on a prepaid card I do not like. I was charged 5.00 for a second card that I never got and 15 more to overnight for total 20.00. Each time I was told wait 5 to 7 days and 3 phone calls later and 20 dollars later I got the card through UPS.
- I appreciated receiving the letter from Dept of Revenue with the income requirements chart except it arrived in late March. Most of my clients who qualified had been in by then. It would be nice to receive this letter in early January.
- Thank you Washington State for helping families!
- VITA sites and ITIN application services prove to be a good way to reach people who qualify for WFTC while providing them enormous service.
- Your website is great. A lot of good information.
- Thank you, great program and great staff!
- Any timeline on when the updated program performance numbers will be available? Right now, it's only updated through April 9th.
- When is the next training session available?
- Try to send out material sooner. Ordered flyers and brochures early this year and I received them a month after.