MLPB
ADVANCING HEALTH THROUGH JUSTICE

BRIDGING DIVIDES

It's Tax Time: Resources for Care Teams

By Kate Gannon and Marsophia Ducheine
MLPB Law & Policy Consultants

March 13, 2023

As two of MLPB's Law and Policy Consultants, we frequently field questions from care teams about how to help families maximize their household income. Tax season can feel daunting, but in reality, if taxes are filed correctly, low-income families can often end up with additional income. An expected tax rebate can even be used to help families stay housed. Care teams should encourage families to get their taxes filed and on time. Here's a roundup of the topics we see most often:

What if the family cannot afford an accountant?

- Refer them to a local tax assistance location for free tax return preparation assistance from the Volunteer Income Tax Assistance (VITA), Tax Counseling for the Elderly, or the AARP.

What if English is not the family's preferred language?

- Many tax forms are only available in English; however, care teams can still share basic tax information in 20 languages.
- Care teams can also refer any person with "limited English" to a local VITA program.

What if the person does not have a social security number?

- People without social security numbers can still file taxes with an Individual Taxpayer Identification Number (ITIN). Care teams can share information on how to apply for an ITIN.
- There are additional benefits to using an ITIN for people without immigration status. Care teams can share Protecting Immigrant Families' resource titled "Your ITIN, Your Money" (available in English and Spanish).

What if someone wants to complete their taxes online?

- Care teams can refer them to free online filing services at Get Your Refund (also available in Spanish).

What if someone receives a text message from the IRS about their return?

- Remind them that the IRS does not send emails or text messages asking for financial information. Care teams can help people avoid scams by sharing information about common phishing techniques.

Know Your Limits! Even with all of these resources, there will be times when someone has a complicated tax issue that requires an attorney. Care teams can refer them to legal assistance.

Visit MLPB's Digital Digest for more information about where to go for help.