

DEPARTMENT OF SOCIAL SERVICES  
744 P Street, Sacramento, CA 95814



August 16, 1994

ALL-COUNTY INFORMATION NOTICE I-26-94

TO: ALL COUNTY WELFARE DIRECTORS  
ALL AFDC PROGRAM COORDINATORS  
ALL CHILD WELFARE SERVICES  
PROGRAM MANAGERS  
ALL PUBLIC AND PRIVATE ADOPTION  
AGENCIES  
CDSS ADOPTIONS DISTRICT OFFICES  
ALL FOSTER FAMILY AGENCIES

REASON FOR THIS TRANSMITTAL

- State Law Change  
 Federal Law or Regulation  
Change  
 Court Order  
 Clarification Requested by  
One or More Counties  
 Initiated by CDSS

SUBJECT: Earned Income Credit (EIC) Survey

REFERENCES: All-County Information Notice (ACIN) I-04-94

The purpose of this letter is to survey those agencies involved in the campaign to increase the claiming of EIC by low income families.

On February 1, 1994 the California Department of Social Services (CDSS) issued ACIN I-04-94 which provided information and materials on a national EIC Outreach Campaign. In addition to the standard ACIN distribution, copies were sent to child welfare services program managers, public and private adoption agencies, the CDSS' adoptions district offices, and all licensed foster family agencies. We also sent a stuffer with the April Medi-Cal cards to AFDC recipients, foster parents and adoptive parents.

A Medi-Cal mailing may not be feasible for next year's campaign because of the conversion to plastic Medi-Cal cards. As a result we hope to get an early start on other methods to distribute information on EIC. The attached survey will help us to prepare for the 1995 EIC campaign. Please complete and return the survey to:

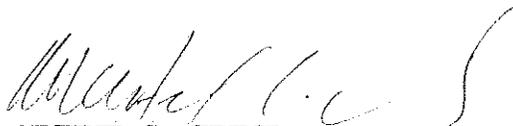
AFDC Policy Implementation Bureau  
744 P St, M.S. 16-54  
Sacramento, CA 95814  
Fax: (916) 654-1401  
ATTN: Pam Kian

The deadline for the survey form is September 30, 1994. As a reference, also attached are copies of the materials which were provided during this year's EIC campaign.

Page Two

If you have any questions, contact Pam Kian in the AFDC Policy Implementation Bureau at (916) 654-1801.

Sincerely,

A handwritten signature in cursive script, appearing to read "Michael C. Genest".

MICHAEL C. GENEST  
Deputy Director  
Welfare Programs Division

Attachments

## EIC EVALUATION 1994

County: \_\_\_\_\_

Agency: \_\_\_\_\_ Contact: \_\_\_\_\_ Phone # \_\_\_\_\_

Using the following chart, please rank in the first column the materials according to usefulness: 0 - Never/seldom used, 1 - Used occasionally, 2 - Used half the time, 3 - Used most of the time, 4 - Used all of the time. In the other columns, indicate when these materials were provided and what percentage of your caseload you distributed to.

	Level of Use 0 - 4	Timing and Location					% of Case-load
		Appli-cation*	Redeter-mination*	Expedited Services**	Counter	Mail	
Flyer							
Stuffer							
Fact Sheet							
IRS Schedule							
Resource List							

Did providing this information impact your workload? How?

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Are there other programs/caseloads that we should target for mailings?

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If you did not use any of the outreach materials provided with the ACIN, what did you use? (Please attach copies of your material to this survey.)

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Are there ways we could improve the EIC campaign next year?

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Additional Comments:

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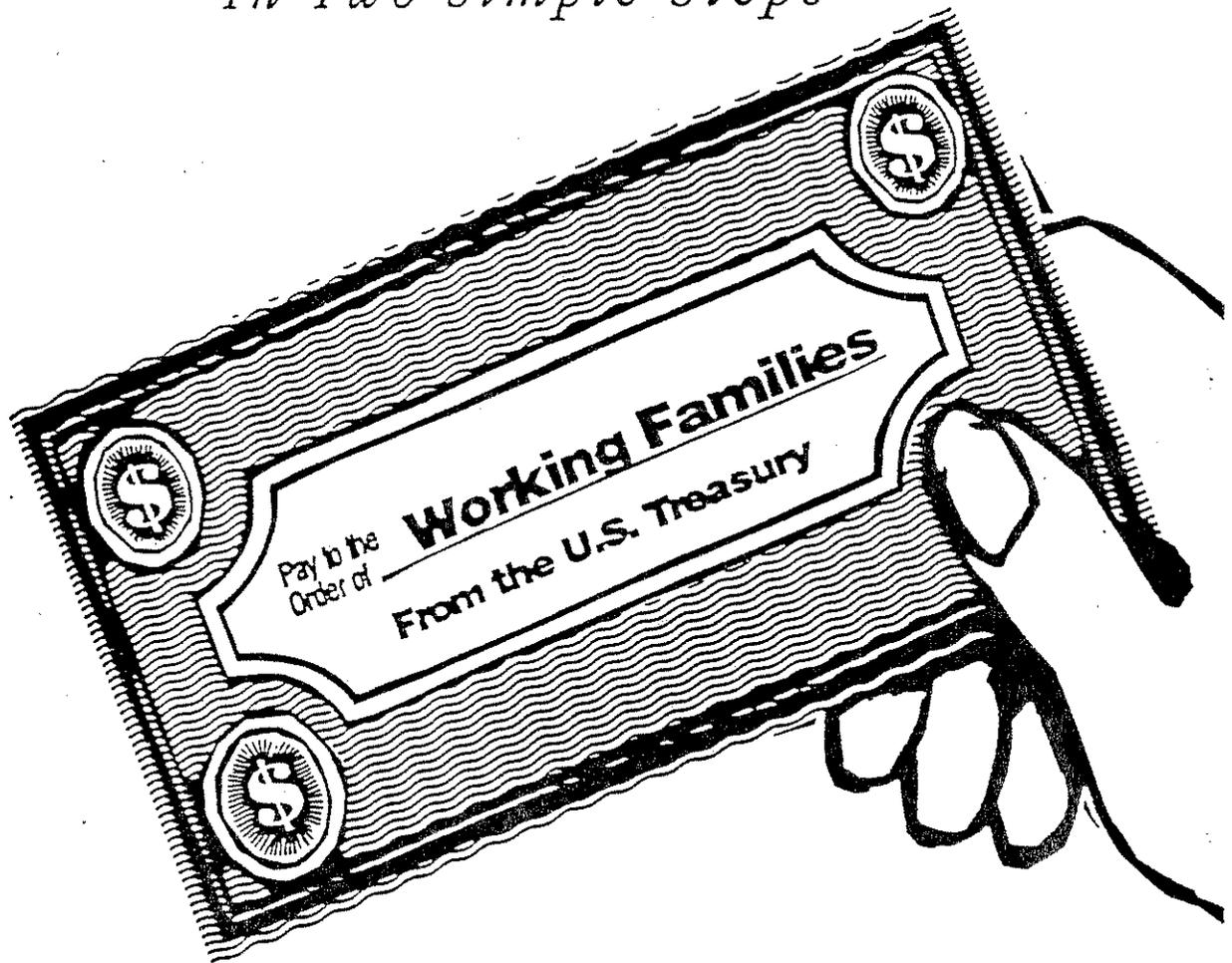


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\*An AFDC eligibility activity  
 \*\*A Food Stamp activity

# Get Up to \$2,364

*In Two Simple Steps*



Did you work during 1993—and did your family earn less than \$23,050?

Did a child live with you for at least half the year?

If so, you may be eligible for up to \$2,364 from the Earned Income Credit. It's a federal benefit for both married and single parents.

Getting your Earned Income Credit takes just two simple steps:

- 1** file a federal income tax return (Form 1040A or 1040, not Form 1040EZ)
- 2** fill out "Schedule EIC" and attach it to your tax return

If you're eligible, you'll either owe less in taxes—or the government will mail you a check! You can get the Earned Income Credit even if you don't owe income tax.

**For more information or to find out about getting tax forms filled out for free, call the IRS toll free at 1-800-829-1040.**

For text telephone access (TTY/TT/TDD), call 1-800-829-4059.

**THE 1994  
EARNED  
INCOME  
CREDIT  
CAMPAIGN**

# EIC Envelope Stuffer

**B**elow are two copies of an English-Spanish envelope stuffer on the EIC. These can be copied and inserted with paychecks, public assistance checks, bills, and other mailings. Local phone and utility companies, for example, might be persuaded to send copies with their December 1993 or early 1994 bills to customers.

## Instructions

The EIC envelope stuffer is easily reproduced on an office copier capable of two-sided copying. Just place this sheet in the copier and select "two-sided to two-sided" copies. When the copying is complete, cut the finished 8 1/2 x 11 inch sheets twice, once to trim off these instructions and once between the two versions of the envelope stuffer. You now have your EIC stuffers, with English wording on one side and Spanish on the other. (Note: Making 10 copies produces 20 two-sided stuffers.) They will fit easily into standard business envelopes.

## Get Up to \$2,364 in Two Simple Steps

**Did you work during 1993—and did your family earn less than \$23,050?**

**Did a child live with you for at least half the year?**

If so, you may be eligible for up to \$2,364 from the Earned Income Credit. It's a federal benefit for both married and single parents who worked either full or part time during part or all of the year.

### How to Get Your Money

Getting your Earned Income Credit takes just two simple steps:

- 1 file a federal income tax return (Form 1040A or 1040, not Form 1040EZ)
- 2 fill out "Schedule EIC" and attach it to your tax return

If you're eligible, you'll either owe less in taxes—or the government will mail you a check! You can get the Earned Income Credit even if you don't owe income tax.

### Does Earned Income Credit Reduce Other Government Benefits?

In almost all cases, no. Only in rare cases will the EIC lower benefits in programs like AFDC, Food Stamps, SSI, Medicaid/Medi-Cal, and public or subsidized housing.

For more information or to find out about getting tax forms filled out for free, call the IRS toll free at 1-800-829-1040. You can get tax forms from the IRS, or at your local Post Office and many banks and libraries. For text telephone access (TTY/TT/TDD), call 1-800-829-4059.

## Obtenga hasta \$2,364 en dos pasos sencillos

**¿Trabajó usted durante 1993—y ganó su familia menos de \$23,050 dólares?**

**¿Tiene un hijo(a) que vivió con usted por lo menos medio año?**  
Si fue así, es posible que tenga derecho a recibir hasta \$2,364 dólares de Crédito por Ingresos Ganados (*Earned Income Credit—EIC*). Este es un beneficio federal tanto para los padres/madres casados como los solteros que trabajaron tiempo completo o en un trabajo de tiempo parcial durante todo el año.

### Cómo obtener su dinero

Para obtener el Crédito por Ingresos Ganados tiene que seguir solamente dos pasos sencillos:

- 1 presente una forma de declaración de impuestos federales sobre los ingresos (la forma 1040A o la 1040, no la 1040EZ)
- 2 llene la forma "Schedule EIC" y adjúntela a su declaración de impuestos

Si usted tiene derecho a recibir este crédito, deberá menos impuestos—o el gobierno le enviará un cheque! Puede obtener el Crédito por Ingresos Ganados aunque no deba impuestos sobre los ingresos.

### ¿Reduce el Crédito por Ingresos Ganados otros beneficios del gobierno?

En casi todos los casos, no. Solamente en casos raros ocurre que el EIC reduce los beneficios en programas como AFDC (Asistencia para Familias con Niños Necesitados), Estampillas para Comida, SSI, Medicaid/Medi-Cal y vivienda pública o subsidiada.

Para más información sobre el EIC o para averiguar cómo obtener ayuda gratuita para llenar las formas de impuestos, llame gratuitamente a la oficina del IRS al 1-800-829-1040 (inglés únicamente). En el sur de California, llame al 1-800-829-4672 (español). En el norte, al 1-415-772-4444. Puede obtener formas de impuestos del IRS, o de la oficina local de correos, así como de muchos bancos y bibliotecas

Para tener acceso a lenguaje escrito telefónico (TTY/TT/TDD), llame al 1-800-829-4059 (inglés únicamente).

# Parents:

"FAMILY" FACT SHEET

## Want up to \$2,364? Get your Earned Income Credit!

### What is the Earned Income Credit?

The Earned Income Credit (EIC) is a government benefit for working families with children. Both married and single parents can get the EIC.

### Who can get the EIC?

To get the EIC, you must be able to answer "yes" to both of the following statements:

- I (or my husband or wife) worked part or full time at some point in 1993.
- My family's income was less than \$23,050 in 1993.

You must also be able to answer "yes" to *at least one* of these two statements:

- A child who is my son, daughter, adopted child, stepchild, or grandchild lived with me for more than six months in 1993.
- A child who is my nephew or niece, a friend or neighbor's child, or a foster child lived with me for all 12 months in 1993.

In either case, the child must be under age 19, a full-time student who is under 24, or totally disabled and any age.

### How does the EIC work?

The EIC is a tax benefit. If you owe federal income tax, the EIC will reduce the amount you owe.

If you don't owe federal income tax, the government will send you a check in the amount of



your EIC benefit. In other words, you can get the EIC *even if you didn't earn enough to owe federal income tax.*

You can still get the EIC even if your employer did not take income tax out of your pay.

### **If you get the EIC, will your welfare benefits be lowered?**

In most cases, no.

If you live in public housing, or if you get help from the government to pay your rent, don't worry. Getting the EIC will not cause your rent to go up.

If you get AFDC, food stamps, SSI, or Medicaid, don't worry. Getting the EIC will not cause your benefits to be lowered.

### **How do you apply for the EIC?**

To get the EIC, you must do two things:

- 1** File a federal income tax return — Form 1040A or 1040. Do *not* use Form 1040EZ.
- 2** Fill out a tax form called "Schedule EIC." Attach this form to your income tax return.

### **Where can you get your tax forms filled out free?**

There is a program to help you fill out your tax forms for free. It is called VITA.

VITA clinics are open from late January through April 15. To find the VITA clinic closest to you, ask an IRS operator at 1-800-829-1040. But be prepared: the line is often busy.

### **What if you haven't filed a tax return in a long time?**

If you haven't filed a tax return recently and wonder what will happen if you file now, it's okay to ask the IRS. *You don't have to give your name!* Call them at 1-800-829-1040.

You might find that because of the EIC, the IRS owes *you* money.

### **Where can you get answers to your questions about the EIC?**

You can call an IRS operator. Call 1-800-829-1040 on weekdays, during business hours. But remember: the line is often busy.

**SCHEDULE EIC**  
(Form 1040A or 1040)

Department of the Treasury  
Internal Revenue Service

Name(s) shown on return

**Earned Income Credit**

- ▶ Attach to Form 1040A or 1040.
- ▶ See instructions for Schedule EIC.

OMB No. 1545-0074

**1993**

Attachment  
Sequence No. 43

Your social security number

**Want the IRS to figure the credit for you? Just fill in this page. We'll do the rest.**

**General Information**

- To take this credit
- You must have worked and earned less than \$23,050, and
  - Your adjusted gross income (Form 1040A, line 16, or Form 1040, line 31) must be less than \$23,050, and
  - Your filing status can be any status **except** married filing a separate return, and
  - You must have at least one qualifying child (see boxes below), and
  - You cannot be a qualifying child yourself.

A qualifying child is a child who:

**is your:**  
son  
daughter  
adopted child  
grandchild  
stepchild  
or  
foster child

**A  
N  
D**

**was (at the end of 1993):**  
under age 19  
or  
under age 24 and a full-time student  
or  
any age and permanently and totally disabled

**A  
N  
D**

**who:**  
lived with you in the U.S. for more than half of 1993\* (or all of 1993 if a foster child)

\*If the child didn't live with you for the required time (for example, was born in 1993), see the Exception on page 64 (1040A) or page EIC-2 (1040).

**Do you have at least one qualifying child?**

**No** ▶ You cannot take the credit. Enter "NO" next to line 28c of Form 1040A (or line 56 of Form 1040).

**Yes** ▶ Go to line 1. But if the child was married or is also a qualifying child of another person (other than your spouse if filing a joint return), first see page 64 (1040A) or page EIC-2 (1040).

**Information About Your Qualifying Child or Children**

1(a) Child's name (first, initial, and last name)	(b) Child's year of birth	For a child born before 1975, check if child was—		(e) If child was born before 1993, enter the child's social security number	(f) Child's relationship to you (for example, son, grandchild, etc.)	(g) Number of months child lived with you in the U.S. in 1993
		(c) a student under age 24 at end of 1993	(d) disabled (see booklet)			
	19					
	19					

**Caution:** If a child you listed above was born in 1993 and you chose to claim the credit or exclusion for child care expenses for this child on Schedule 2 (Form 1040A) or Form 2441 (Form 1040), check here

**Do you want the IRS to figure the credit for you?**

**Yes** ▶ Fill in lines 2 and 3; and enter the amount from Form 1040A, line 16, or Form 1040, line 31, here. \$

**No** ▶ Go to page 2 on the back now.

**Other Information**

<b>2</b> Enter any nontaxable earned income (see page 65 (1040A) or page EIC-2 (1040)) such as military housing and subsistence or contributions to a 401(k) plan. Also, list type and amount here. ▶		
<b>3</b> Enter the total amount you paid in 1993 for health insurance that covered at least one qualifying child. See instructions		

**If you want the IRS to figure the credit for you:**

**S  
T  
O  
P** ▶ **Attach this schedule to your return.**

- If filing Form 1040A, print "EIC" on the line next to line 28c.
- If filing Form 1040, print "EIC" on the dotted line next to line 56.

Board of Directors  
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 Urban Strategies  
 Council  
 Hon.  
 Allen E. Broussard  
 California Supreme  
 Court - Ret.  
 William Cobientz  
 Cobientz, Cahen,  
 McCabe & Breyer  
 Geoffrey Cowan  
 Chimark  
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 Anra DeFrantz  
 Amateur Athletic  
 Foundation  
 Robert Fisher  
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 Danny Goldberg  
 Atlantic  
 Recording Corp.  
 Mimi L. Haas  
 Community Volunteer  
 Kai Haycock  
 American Association  
 of Higher Education  
 Denis Hayes  
 Green Seal, Inc.  
 F. Warren Hellman  
 Hellman & Friedman  
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 Jonas & Associates  
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 Jones Day  
 Reavis & Pogue  
 Jim Plunkett  
 L.A. Raiders - Ret.  
 Hon. Cruz Reynoso  
 UCLA School of Law  
 George Roberts  
 Konberg Kravis  
 Roberts & Co.  
 Leigh Steinberg  
 Sports Attorney  
 James Steyer  
 President,  
 Children Now  
 Thomas Steyer  
 Farallon Partners  
 Chang-Lin Tien  
 University of  
 California - Berkeley  
 Michael Tolim  
 Halcyon Days  
 Productions  
 Ian Watson  
 HAL  
 North America Inc.



## RESOURCES FOR EIC OUTREACH

### IRS Resources

The IRS has produced EIC brochures and posters in English and Spanish. In addition, IRS speakers and workshops on the EIC are available. To order materials or request a speaker, call the Taxpayer Education Coordinator that serves your county.

### Taxpayer Education Coordinators

Marin, Contra Costa, San Joaquin, Calaveras, Alpine and north to the Oregon border	(916) 974-5088
San Francisco, San Mateo and Alameda	(510) 637-2473
Santa Cruz, Santa Clara, Stanislaus, Tuolumne, Mono and south to Ventura, Kern and Inyo	(408) 291-7114
Los Angeles	(213) 894-4574
Orange, Riverside, San Bernardino, San Diego and Imperial	(714) 643-4060

### EIC Information Kit

The Center on Budget and Policy Priorities in Washington, D.C. has an excellent information kit that includes high-quality copies of many EIC outreach materials and a 28-page "how to" guide on EIC community outreach. For copies, call the Center at 202/408-1080 and ask for Alison Pion, Jocelyn Woodards or Scott Barancik.

### Additional EIC Outreach Materials

Children Now can provide copies of materials produced by the Center on Budget and Policy Priorities. These include fact sheets describing two supplemental EIC benefits and the new law expanding the EIC, talking points on the EIC, and information on the EIC Advance Payment Option, which allows workers to receive the EIC in their paychecks throughout the year.

### Multilingual Materials

Contact Children Now if you are interested in EIC outreach materials in languages other than English and Spanish.

### Free Tax Assistance for Families

The IRS 1-800-829-1040 phone line provides tax assistance and information, including recorded messages and the location of the nearest Volunteer Income Tax Assistance (VITA) site. VITA sites provide free assistance in filling out tax forms and will open in February. If you are interested in a full listing of VITA sites in your area, please call Children Now's Oakland office.

In Northern California, the United Way of the Bay Area's HELPLINE provides EIC information and VITA site locations. The HELPLINE is an accessible alternative to the IRS phone line, with multilingual operators.

### Northern California Referral Line - United Way of the Bay Area's HELPLINE

English - for area codes (707) (408) (916)	(800) 273-6222
English - for area codes (415) (510)	(415) 772-HELP
Spanish	(415) 772-4444
Cantonese, Mandarin	(415) 554-2454

#### Bay Area

1212 BROADWAY  
 SUITE 530  
 OAKLAND, CA  
 9 4 8 1 2  
 510-763-2444

#### State Capital

926 J STREET  
 SUITE 1400  
 SACRAMENTO CA  
 9 5 8 1 4  
 916-441-2444

#### Los Angeles

1930 14TH ST  
 57A MONICA, CA  
 9 0 4 0 4  
 310-399-7444