



Filing Tax Returns - How to Assist Employed Family Members

Refugee family members who are employed in the U.S. must file a tax return. IRIS does not offer tax advice or assistance with filing returns. It is important that refugees who work are given guidance on where to access help. Most will benefit from the free service provided by VITA, the Volunteer Income Tax Assistance program. Any taxpayer earning less than \$64,000 should call 211 or go to <https://uwc.211ct.org/taxhelp/> to make an appointment. It is a good idea to make VITA appointments early; the appointment slots fill up quickly. Appointments are available during tax season, from January-April.

Refugee family members who lived and worked in the U.S. for a portion of a year, must file their taxes as a “**dual status alien**” (someone who was not a resident of the U.S. on January 1 of a given year, but who became a resident of the U.S. on or before December 31). Special rules apply to those that fall into this category and the volunteers at VITA are generally not trained in those special rules. In these cases, a professional tax preparation service should be hired and informed of the individual’s filing status as a “dual-status alien”. Co-Sponsor groups should source local tax preparation services to assist refugees for that first year’s tax return and then educate family members about how to make an appointment. In subsequent years, employed family members should be able to use VITA’s services instead, as long as they meet the income requirements.

IRIS recommends the following tax preparation services if branch offices are available in your area:

Liberty Tax Service (866) 871-1040
Jackson Hewitt Tax Service 800 234-1040
H&R Block 1 (800) 472-5625

Review the following questions with the family members who will need to file returns and encourage them to call the services you recommend, keeping in mind the following questions that should be asked:

* **How much do you charge?** *If they say that their fee is a percentage of your tax refund -- or if they tell you that they can get you a bigger tax refund than other experts can -- avoid them! (They may want to put false information on your tax returns to make your refund bigger. This could cause serious problems for you later.) Call another tax preparer.*

* **Will I be able to contact you after tax season is over, if the government asks questions about my tax return?** *There is no one at IRIS or within the group who is*

qualified to help with tax questions, so if you need help after tax season is over, you will want to go back to the expert who prepared your tax returns.

* **Are you familiar with the tax rules for dual-status aliens?** *If they say no, then call another tax preparer – unless this one is willing to do some research and learn the special rules.*

Before the appointment, review the tax records family members who are filing returns should bring with them to the appointment and important tips they should keep in mind:

* **Bring all of your tax records.** *This will include:*

1. *a **W-2 form (or a 1099 form)** from each employer you or your spouse worked for in the first calendar year you lived and worked in the U.S.*
2. *one or more **1095 forms** (containing important information about the health insurance you and your family had that year)*
3. *the **Social Security number and date of birth** for each person in your family.*

* **Tell the tax preparer that you were a dual-status alien in the applicable year, and you want your tax returns to follow the rules for dual-status aliens.**

* **Make sure that the tax preparer does not put any false information on your tax return!**

* **Make sure that the tax preparer gives you a copy of your completed tax returns.** *(There will be one set of papers for your federal income tax return, and one set of papers for your State of Connecticut income tax return.)*

* **Make sure that the tax preparer signs your income tax return, and ask him or her to show you his or her Preparer Tax Identification Number next to the signature.** *(The law requires anyone who is paid to prepare tax forms to have a Preparer Tax Identification Number, and to put that number on each tax return that he or she prepares.)*

A note about a qualified tax preparer who has offered to assist the family free of charge: If your group is fortunate enough to have a CPA or other qualified professional offer their services free of charge, please ensure they are familiar with how to assist someone who must file as a dual-status alien. The laws are tricky and complex. Also keep in mind that eventually, family members will need to learn how to make appointments with VITA or other tax preparation providers outside of the donated services offered when they first arrive. That transition should be facilitated by the group as needed.

Lastly, encourage the family to follow the advice outlined here by reminding them that if they do, when it is time for them to apply for a Green Card or for U.S. citizenship, they will be able to say that they are law-abiding, tax-paying residents of the United States!