# Sign-up Guide for Non-filers

2021 Child Tax Credit (CTC)

#### July 7, 2021

This guide is meant to help you successfully complete the Non-filer Signup Tool to get Child Tax Credit (CTC) payments, as well as any Economic Impact Payments (EIP) — also known as stimulus payments — that you may have missed.\*

## Who should use the Non-filer Sign-up Tool?

People who:

- Had gross income at or below \$12,200 (\$24,400 for married couples) for 2020
- Lived in a U.S. state, the District of Columbia, or a U.S. military base  $\checkmark$ for most of 2020
- Did not file a tax return for 2020
- Do not plan to file a tax return for 2020



- Were otherwise not required to file a federal income tax return for 2020
- Cannot be claimed as a dependent on someone else's tax return

#### \* This guide is intended to help you fill out the Non-filer Sign-up Tool. This is not tax advice. For official guidance about the Non-filer Sign-up Tool, please see the Revenue Procedure 2021-24 from the Internal Revenue Service (IRS) at https://www.irs.gov/pub/irs-drop/rp-21-24.pdf

For more information, visit <u>irs.gov/childtaxcredit2021</u>

**Not sure if you should use this form or file a full 2020 tax return?** Use the IRS Interactive Tax Assistant tool: <u>Do I Need to File a Tax Return?</u>\* It asks a few basic questions to tell you if you need to file a 2020 tax return.

## **Before you start**

You'll need the information below when you fill out this form. Please have it ready before you start:

- Social Security Number or Individual Taxpayer Identification Number (ITIN) for you and your spouse (if you have one)
- Social Security Numbers for your children
- A reliable mailing address
  - An e-mail address



You will not need a 1099 or W-2 to sign up.

If the Internal Revenue Service (IRS) sent you an Identity Protection Personal Identification Number (IP PIN) in the past, you'll need it to use this tool. If you lost it, use the <u>Get an IP PIN</u>\*\* tool to get your number back.

\* Do I Need to File a Tax Return?:

https://www.irs.gov/help/ita/do-i-need-to-file-a-tax-return

**\*\*** Get an IP PIN tool:

<u>https://www.irs.gov/identity-theft-fraud-scams/get-an-identity-protection-pin</u>

## Ready? Let's go!

- If you were married at the end of 2020, you and your spouse should only fill out the form in this Non-filer Sign-up Tool once together.
- Y If you have a child born in 2021, do not list them on the form at this time. The IRS will release further guidance about how to get the Child Tax Credit for them at a later date.
- S This form will probably take at least 20 minutes to finish.

### Welcome

The Non-filer Sign-up Tool is at

https://www.freefilefillableforms.com/#/fd/childtaxcredit

This is how the page should look. It's not on a .gov website. It was made by a member of the Internal Revenue Service (IRS) Free File Alliance.



Before you click **Get Started**, make sure you have these items with you:

• Social Security Number or Individual Taxpayer Identification Number

(ITIN) for you and your spouse (if you have one)

- Social Security Numbers for your children
- A reliable mailing address
- An e-mail address
- Your bank account information (if you want your payments sent straight to your bank account by direct deposit)

Let's begin! Click **Get Started**.



## Get started

First, you make a new account with the Non-filer Sign-up Tool for 2021.

#### **Create an account**

- 1. Enter your **Email address**. Enter it again in **Confirm email**.
- 2. Pick a **User ID**. (This can be your email address, name, or something else.)
- 3. Enter your **Phone number** if you'd like. This part is optional.
- 4. Pick a **Password**, then type it again in **Confirm**.
- 5. Click Create Account.



This service is delivered by Intuit. For details on how we process your personal information, see the <u>Privacy Statement</u> .	<u>I forgot my user ID or password</u>
Email address	
Confirm email	
User ID	

This tool times out after 20 minutes. If that happens, just click **Sign In**. Then enter the **User ID** and **Password** you picked.



## Step 1: Fill out your tax forms

Filling out this simplified tax return will help you get 2021 Child Tax Credit (CTC) payments.

The Child Tax Credit (CTC) does not count as income for any family, so you won't lose your other government benefits by signing up for CTC payments. They do not affect your eligibility for other federal benefits like SNAP and WIC.

#### Filing Status and Personal Information

1. Select if you are **Single** or **Married** (as of December 31, 2020).

Non-filer Sign-up Tool	🕒 Update Your Account 📔 🖻 Sign Out
This is a Free File Fillable Forms product.	Save Print Return 🖉 Start Over 🖉 Check E-File Status

<b>1. Fill Out Your Tax Forms</b>	STEP 2. E-File Your Tax Forms		and the second second
Enter Your Information			
Filing Status			-
If there is one adult on this registration	on, select Single. If there are two, select Married fil	ling jointly.	
○ Single ○ Married filing jointly			
Personal Information			
First name	Middle initial Last name	Your social security number	

 Complete the Personal Information section. Enter your First name, Middle initial, and Last name. Be sure to use your full legal name. Then enter Your social security number (or ITIN).

) Single O Married filing	jointly					
Personal Information						
First name	Middle initial	ial Last name	Your social security number			
Only enter spouse's information	on if filing jointly					
Spouse's first name	Middle initial	Spouse's Last name	Spouse's social security number			

3. If you're married, type your spouse's information.

First name	Middle initial	Last name	Your social security number
Only enter spouse's informatior	n if filing jointly		
Spouse's first name	Middle initial	Spouse's Last name	Spouse's social security number

4. Add your **Home address**. This address is where the IRS will try to contact you about your payments over the next year. You can also put another address where you can be reached.

If you have a P.O. box, only ente	r the P.O. box if mail is not	delivered to your home.		
Home address (number and stre	et).		Ap	artment Number
City/town/post office		State/province	Zip	/postal code
			▼	

#### **Standard Deduction**

Did someone else list you or your spouse as a "dependent" on their tax return in 2020? This means they listed you as a qualifying child or relative for tax savings or payments. If they did, select **You as a dependent** or **Your spouse as a dependent**. If no one listed you as a "dependent", leave this area blank.

Standard Deduction         Someone can claim:         You as a dependent       Your spouse as a dependent         You as a dependent       Your spouse as a dependent         Image: Stop if your gross income exceeds \$12,400 (\$24,000 for a married couple) or if you chose either radio button above, indicating you or your spouse, if married filing jointly, can be claimed as a dependent on someone else's return. You are not eligible to use this online form.	City/town/post office	State/province Zip/postal co	ode
Someone can claim:   You as a dependent Your spouse as a dependent     TTENTION:   Stop if your gross income exceeds \$12,400 (\$24,000 for a married couple) or if you chose either radio button above, indicating you or your spouse, if married filing jointly, can be claimed as a dependent on someone else's return. You are not eligible to use this online form.	Standard Deduction		
You as a dependent       Your spouse as a dependent       Image: Comparison of the spouse as a dependent         ATTENTION:       Stop if your gross income exceeds \$12,400 (\$24,000 for a married couple) or if you chose either radio button above, indicating you or your spouse, if married filing jointly, can be claimed as a dependent on someone else's return. You are not eligible to use this online form.	Someone can claim:		
ATTENTION: Stop if your gross income exceeds \$12,400 (\$24,000 for a married couple) or if you chose either radio button above, indicating you or your spouse, if married filing jointly, can be claimed as a dependent on someone else's return. You are not eligible to use this online form.			
ATTENTION: Stop if your gross income exceeds \$12,400 (\$24,000 for a married couple) or if you chose either radio button above, indicating you or your spouse, if married filing jointly, can be claimed as a dependent on someone else's return. You are not eligible to use this online form.	You as a dependent 🛛 Your spouse a	s a dependent 🕜	
Stop if your gross income exceeds \$12,400 (\$24,000 for a married couple) or if you chose either radio button above, indicating you or your spouse, if married filing jointly, can be claimed as a dependent on someone else's return. You are not eligible to use this online form.	☐ You as a dependent ☐ Your spouse a	s a dependent	
your spouse, if married filing jointly, can be claimed as a dependent on someone else's return. You are not eligible to use this online form.	You as a dependent  Your spouse a	s a dependent	
	You as a dependent Your spouse a ATTENTION: Stop if your gross income exceeds \$12.4	s a dependent ③	ou or
	You as a dependent Your spouse a ATTENTION: Stop if your gross income exceeds \$12,4 your spouse, if married filing jointly, can leave the spouse of the spo	s a dependent ③	ou or

#### Dependents

 Enter your dependents. These are your children or relatives who qualify you to get tax savings or payments. If you're not sure what this means, you can read more in <u>IRS Publication 501</u>.\*

For each dependent, write their **First name**, **Last name**, and **Social Security Number** (listed here as "Social Security No.").

Do not enter information	on about children born in 2	021. This information will r	need to be provided to the	e IRS through another metho	od.
First name	Last name	Social security number	Relationship to you	IP PIN (if applicable)	Qualifies for CTC ?
	Ι				
	I				

2. Select their **Relationship** to you from the dropdown box.

)o not enter informatio	on about children born in	2021 This information will r	need to be provided to the	IRS through another meth	od
				s no through another meth	
First name	Last name	Social security number	Relationship to you	IP PIN (if applicable)	Qualifies for CTC ?
			•		
	1		•		

3. If the IRS sent an Identity Protection Personal Identification Number (IP PIN) for any of your dependents, enter it in the **IP PIN** box for that dependent. Most people do not have an IP PIN.

o not enter informatio	on about children born ir	n 2021. This information will n	need to be provided to the	e IRS through another metho	od.
First name	Last name	Social security number	Relationship to you	IP PIN (if applicable)	Qualifies for CTC ?
			<b>~</b>		
	]		<b>~</b>		
			•		

\* IRS Publication 501: <u>https://www.irs.gov/pub/irs-pdf/p501.pdf</u>

4. Show the dependents who you think you can get CTC payments for. Just use the boxes under **Qualifies for CTC**. Check the box on the same line as their name.

First name	Last name	Social security number	Relationship to you	IP PIN (if applicable)	Qualifies for CTC ?
			•		
			×		

#### Not sure if they qualify?

Check out this checklist. Each child must meet all of these requirements in order to qualify for the Child Tax Credit (CTC). If they do, great! Simply check the box under Qualifies for CTC on the same line as their name.

- The child is your son, daughter, stepchild, eligible foster child, brother, sister, stepbrother, stepsister, half-brother, half-sister, or a descendant of any of them (for example, your grandchild, niece, or nephew).
- The child was under age 17 at the end of 2020.
- The child did not provide over half of his or her own support for 2020.
- The child lived with you for more than half of 2020.
- The child can be claimed as a dependent on your return.
- The child does not file a joint return for the year (or files it only to claim a refund of withheld income tax or estimated tax paid).
- The child was U.S. citizen, U.S. national, or U.S. resident alien.

5. If you have any additional dependents, check the box below the list of your other dependents. Then click **Add**. Repeat the previous steps.

First name	Last name	Social security number	Relationship to you	IP PIN (if applicable)	Qualifies for CTC ?
			<b>~</b>		
] If you have addition	onal dependents, check t	his box and add them here	Add		

#### **Recovery Rebate Credit**

In this form, you can also apply for the Recovery Rebate Credit, which is sometimes called "stimulus payments" or "stimulus checks." Write how much you think you are owed in **Recovery Rebate Credit Amount**.



- If you *did get stimulus payments* and believe you got the full amount of stimulus payment, enter "0" (zero) in **Recovery Rebate Credit Amount**.
- If you *got some stimulus payment* but believe you didn't get the full amount, you must use the <u>Recovery Rebate Credit Worksheet (page 59</u>)

<u>of this PDF</u>)\* to calculate the correct amount. Enter that calculated amount in **Recovery Rebate Credit Amount**.

• If you *did not get a stimulus payment*, you can use the table below to figure out your amount.

If you are married, take the dollar amount from the "Married Filing Jointly" column that matches your number of dependents. Put that dollar amount in the **Recovery Rebate Credit Amount** box.

Dependents	Married Filing Jointly
0	\$3,600
1	\$4,700
2	\$5,800
3	\$6,900
4	\$8,000
Additional	+\$1,100 for each
dependents	additional dependent

	Rebate Credit Amount box.
	amount in the <b>Recovery</b>
	dependents. Put that dollar
	matches your number of
	other Filers" column that
	corresponds from the "All
R	dollar amount that
	If you are single, take the

Dependents	All other Filers
0	\$1,800
1	\$2,900
2	\$4,000
3	\$5,100
4	\$6,200
Additional	+\$1,100 for each
dependents	additional dependent

If you or your spouse is not a U.S. Citizen or Permanent Resident, you must use the <u>Recovery Rebate Credit Worksheet (page 59 of this PDF)</u>\* to calculate the correct amount. Enter that calculated amount in **Recovery Rebate Credit Amount**.

\* Recovery Rebate Credit Worksheet: see page 59 of <u>https://www.irs.gov/pub/irs-pdf/i1040gi.pdf</u>

#### **Banking Information**

Next, you choose how you want to get your payments. Choose what works best for you: A) bank account, B) existing prepaid debit card, or C) mail.

#### A) Get payments in a bank account

You can get payments sent straight to a bank account. These account payments are digital.

If you already have a bank account, follow the directions below. If you don't have a bank account, you can open one from this list of banks that have low or no monthly fees, and are FDIC-insured: <u>#GetBanked</u>.\*

 Put which kind of bank account you have: Checking account or Savings account. Most accounts are checking accounts.

Recovery Rebate Credit Amount (?)	
Banking Information	

If you are adding a routing number and a	ccount number for a banking app or reloadable debit card, select "Checking account" below.
○ Checking Account ○ Savings Acco	punt
Routing number	Account number

2. Write your bank account numbers. You need your **Routing number** and **Account number**. These numbers are on the bottom of your bank checks. The routing number is first. The account number is second. Please write your numbers carefully. Every account has different numbers, and the IRS wants to get payments to the correct person.

		1025
00	to the	DOLLARS @ DEC
ME		<b>::</b> 00000000
•		

If you are adding a routing nu	mber and account number for a banking	app or reloadable debit card, select "Che
Checking Account Sa	avings Account	
Routing number	Account number	

\* FDIC #GetBanked list: <u>https://www.fdic.gov/getbanked/index.html</u>

#### B) Get payments sent to your existing prepaid debit card

Some prepaid debit cards can be reloaded with payments. Ask the place where you got your card if you can re-use it for payments. If they say yes, ask them these questions and write your answers in this form:

 Is my card account a Checking account or a Savings account? Most accounts are checking accounts.

Banking Information		
If you are adding a routing num	r and account number for a banking app or reloadable debit card, sele	ect "Checking account" below.
○ Checking Account ○ Sav	gs Account	
Checking Account Sav	gs Account Account number	

2. What are the **Routing number** and **Account number** for my account? These may be different from your card number.

Banking Information	
---------------------	--

○ Checking Account	O Savings Acco	unt
Routing number		Account number

#### C) Get payments in the mail

If you want your payments through checks in the mail, just leave this part of the form blank.

ou are adding a routing nu	mber and account number for a banking app or relo	adable debit card, select "Checking account" below.
Checking Account O S	avings Account	
outing number	Account number	

### **Identity Protection PIN**

If the IRS sent you an Identity Protection PIN (likely because you experienced identity theft), enter the PIN in the **Taxpayer Identity Protection PIN** box. If the IRS also sent one to your spouse, enter their PIN in the **Spouse Identity Protection PIN** box.

Most people have not been sent an Identity Protection PIN.

outing number	Account number
dentity Protection PIN (if Applic	able)
you or your spouse have experience	able) ed identity theft and the IRS sent you Identity Protection PINs, enter those PINs here to successfully file this return.
dentity Protection PIN (if Applic	able) ed identity theft and the IRS sent you Identity Protection PINs, enter those PINs here to successfully file this return. Spouse Identity Protection PIN (if filing jointly)
dentity Protection PIN (if Applic f you or your spouse have experience axpayer Identity Protection PIN	able) ed identity theft and the IRS sent you Identity Protection PINs, enter those PINs here to successfully file this return. Spouse Identity Protection PIN (if filing jointly)

### **Continue to Step 2**

## Congratulations, you've completed **Step 1: Fill out your tax forms**! Click **Continue to Step 2**.

	Continue to Step 2	

## **Step 2: E-File Your Tax Forms**

Non-filer Sign-up Tool	E Update Your Account   E Sign Out
This is a Free File Fillable Forms product.	Save Print Return Start Over Check E-File Status 🦻 FAQs
STEP 1. Fill Out Your Tax Forms STEP 2. E-File Your Ta	ax Forms
Enter Your Information	
Personal Verification	
You must enter either your 2019 Adjusted Gross Income (AGI), or your 201 filing a joint return, both taxpayers must follow this process.	19 five-digit self-selected signature PIN. If you are
A. Look at last year's federal tax return and enter your AGI in the space pr	rovided below. Look for your AGI on line 7 of the Form 1040.

#### **Enter Your Information**

The form asks about last year's filing status. What this means is: did you file a tax return in 2020 to report on what happened in 2019?

- If you didn't file a tax return in 2020, enter "0" (zero) for the AGI in the Your Information and/or Spouse's Information boxes.
- If you used the Non-filer Sign-up Tool to claim stimulus checks in 2020,

## enter "1" (one) for the AGI in the **Your Information** and/or **Spouse's Information** boxes.

If you did file a tax return in 2020, enter last year's AGI (line 8B on your 1040 form for 2019) in the Your Information and/or Spouse's Information boxes.



#### You can leave the signature PIN area blank.

В	<ul> <li>Enter last year's self-selected signature PIN. If you do not have or do not in step A above.</li> </ul>	t remember your PIN, skip th	is step and follow the instruct
		YOUR INFORMATION	SPOUSE'S INFORMATION
L	ast year's five-digit self-selected signature PIN:		
E	lectronic Signature		

#### **Electronic Signature**

- 1. Enter **Today's date**.
- 2. Optional: If you want, enter your **Cell phone number**.
- 3. Create a new **Five-digit PIN** (personal identification number).
- 4. Enter your **Date of birth**.



Enter your driver's license (or state-issued ID) information for you and/or

your spouse. If you don't have one, leave it blank.

- 5. Enter your **Driver's license or State issued ID number**.
- 6. Enter your **Driver's license or State issued ID state**.
- 7. Enter your **Driver's license or State issued ID issue date**.
- 8. Enter your **Driver's license or State issued ID expiration date**.

D. Date of birth	mm/dd/yyyy	mm/dd/yyyy
If you do not have a driver's license or State issued ID, you can leave	e the following fields blank.	
	YOUR INFORMATION	SPOUSE'S INFORMATION
E. Driver's license or State issued ID number		
F. Driver's license or State issued ID state	<b></b>	<b>v</b>
G. Driver's license or State issued ID issue date	mm/dd/yyyy	mm/dd/yyyy
H. Driver's license or State issued ID expiration date	mm/dd/yyyy	mm/dd/yyyy
Email Verification		

#### **Email Verification**

For the last step on this page of the form, you make sure the form has the correct email address listed for you.

1. Click on **Update Your Account**.



2. A new **Update Account** window will pop up. Click **Verify email**.



#### 3. A Send verification email button will appear. Click on it.



4. When you see the "Got it!" message appear on the screen, click on **Exit** near the top right.



5. Sign into the email account you listed on this form. In a moment, you should get an email from Non-filer Sign-up Tool or customer\_service@freefilefillableforms.com about your account.

- 6. In the email, click on **Confirm my account's email address** to show that the form has the correct email address for you.
- 7. Return to the Non-filer Sign-up Tool to finish filing.

## It's time to submit!

When this screen pops up, that's a good thing because it means it's time to submit the form.

leady to File					
When you select 'File Now,' your return will be submitted to the IRS.					
Disclosure statement:					
Under penalties of perjury, I declare that I have examined this return, including any accompanying statements and schedules and, to the best of my knowledge and belief, it is true, correct, and complete.					
I consent to allow my Intermediate Service Provider, transmitter, or Electronic Return Originator (ERO) to send my retur receive the following information from the IRS:	n to the IRS and to				
<ul> <li>a) an acknowledgement or receipt or reason for rejection or transmission</li> <li>b) an indication of any refund offset</li> <li>c) the reason for any delay in processing the return or refund</li> <li>d) the date of any refund.</li> </ul>					
I am signing this return by entering my self-selected signature PIN and associated electronic signature data in Step 2.					
Back to Forms	File Now				

Read the **Disclosure Statement** on the screen, then select the "I agree to

#### the terms above" checkbox. When you're ready, click **File Now**.

## And you're done — way to go!

Next step: You'll get an e-mail from **Customer Service at Free File Fillable Forms**, a trusted IRS partner. The email will either acknowledge you have successfully submitted your information, or tell you there is a problem and how to correct it.

If you are using a public computer, such as a public library computer or other shared computer, be sure to sign out and completely close the **Non-filers Sign-up Tool** browser before leaving the computer.

After you submit your form using the Non-filer Sign-up Tool, you can see if your form has been processed with the IRS <u>Where's My Refund?</u> Portal.\*

After your form has been processed (probably a few weeks after submitting your information with the Non-filer Sign-up Tool), you can check on your tax payments in the **IRS Child Tax Credit Update Portal**. In that Portal, you will also be able to update your bank information and address soon.

\* IRS "Where's My Refund?" Portal: <u>https://www.irs.gov/refunds</u>