

Available IRS Services During A Shutdown

Tax Help Software™

What can a tax pro do when the IRS is closed.

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Roger Nemeth, EA and NTPI Fellow

- Started managing tax franchises in 2006.
- Developed Audit Detective in 2010.
- Qualified as an N.T.P.I. Fellow in 2015.
- Worked as a programmer for the largest Tax Resolution Company integrating automated transcript systems into workflow programs.
- Assisted in the downloading and research of over 30 million transcripts.
- To date our software has been used to download just over one-fourth of a billion transcripts.



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Presentation Materials Are Copyrighted

Recently several of our webinars have been rebroadcast or used by other practitioners or companies to do their own presentations. I absolutely believe in collaboration with other tax professionals but please do not use all or part of this presentation without permission. A lot of work goes into these presentations.

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Other Webinar Topics

1. The IRS has stopped answering the phones and shut the lights off. What can a tax professional still do? (1 hour)
 - This class will cover the IRS services that are still available during the current shutdown. This class will include best practices that were learned last year during the government shut down. There are opportunities for revenue emerging from this crisis for trained tax professionals.
2. E-Services and IRS Transcripts Course (2 hours)
 - Class will discuss how a tax professional can leverage the features of the IRS online E-Services features to help them better serve their clients. The course will cover everything from how to sign up through the Transcript Delivery System and how to use the transcripts.
3. How to onboard tax clients and tax resolution clients (1 hour)
 - This course is a best practice course on how to do a proper taxpayer and tax resolution client intake. The target audience should have a basic knowledge of IRS Transcripts.
4. Learn The Best Way To Get Your 8821/2848's Processed And Accepted (Over 95% first time acceptance rate) (1 hour)
 - This is a detailed overview of how the IRS CAF Unit processes 8821/2848, including best practices to increase your first-time acceptance rate to over 95%.
5. First Time Penalty Abatement Made Easy (FTA) (1 hour)
 - This is my most popular webinar year after year. Over 10,000 practitioners have attended this webinar in the past 4 years. This course will teach step by step instructions on how to identify First Time Penalty Abatement opportunities and then use best practices to get them accepted.
6. How To Detect & Mitigate IRS Exams Before They Begin (2 hours)
 - Learn how to detect IRS Exams early by understanding the IRS audit selection process and mitigate the effects for your clients. This course will actually show you how to detect audits and CP2000 six months in advance.
7. Understanding IRS Statute Of Limitations : ASED, RSED & CSED (2 hour) Part 1
 - This course is an advanced class and teaches the attendee how to manually calculate the three IRS Statutory Dates: Assessment (ASED), Refund (RSED), and Collections (CSED). This is a must for every tax professional from tax preparers to tax resolution specialists. The IRS calculations are incorrect over 40% of the time there is a tolling event per the IRS Inspector General. This is Part 1 of a two part series. The second course is How To Calculate The CSED And Successfully Contest It With The IRS.
8. How To Calculate The CSED And Successfully Contest It With The IRS (2 hour) Part 2
 - This is part two of the Understanding IRS Statute Of Limitations : ASED, RSED & CSED course. This course will cover how to obtain the IRS CSED and calculate the CSED from available data (IRS Transcripts) and compare them for accuracy and opportunities. In addition, this course will also cover how to verify the tolling events have been entered correctly and if they qualify as tolling events. This is one of the fastest growing tax controversy areas in tax resolution.
9. Basics of Federal Tax Discharge In Bankruptcy (1 hour) Part 1
 - This course will discuss the basics of discharging federal tax debt in bankruptcy. Part 2 will discuss how to do the research and calculations
10. Bankruptcy Tax Discharge - Learn how to assist bankruptcy attorneys evaluate a taxpayer for a potential bankruptcy. (2 hour) Part 2
 - This course will cover how to evaluate an individual taxpayer's IRS account for a potential bankruptcy filing. This course will focus on the IRS account review and the calculations for the potential bankruptcy discharge dates.

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Handouts

- Presentation Slides

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Objective

Originally this presentation was created and presented during the Government last shut down (December 2018 to January 2019). This material has been updated with the latest information. Please understand this is a dynamic situation that is changing constantly. There is still a lot of tax business that can be done in these challenging times.

- Identify IRS Services no longer available.
- Identify what services are actually open at the IRS.
- Identify best practices to get tax information for clients.
- Identify revenue opportunities for those tax offices still serving clients

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IRS Communications From the Last Week

- **IRS Operations During COVID-19: Mission-critical functions continue (IRS.gov)**
 - IRS continues to update this webpage but it has been lagging behind the reality by as many as two days.
 - **“Practitioner Priority Service (PPS) –** Due to staff limitations the Practitioner Priority Service line is closed until further notice.
 - Please make IRS.gov your first option for answers to questions.
 - Practitioners with e-Services accounts and with client authorization can access the Transcript Delivery System to obtain prior-year transcripts. Taxpayers should use Where’s My Refund? and Get Transcript, both common requests.
 - Normal operations will resume as soon as possible.”
- **IRS Newswire IR-2020-59 (3/25/2020)**
 - In essence this announcement closes ACS until July 15. More details on the next slide.
- **IRS Internal Memo (Politico IRS orders office evacuation, affecting most agency employees) (3/27/2020)**
 - “An agency-wide email from IRS Human Capital Officer Robin Bailey on Friday explained that all employees “including employees who are currently not teleworking but whose work is portable or can be adapted to work off-site” must “evacuate the work site” and either work from home or an alternate location.”

Note: All of these communications were published through the media or widely circulated in the tax professional community. None of this is confidential information.

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Current Collections Status

Mostly from IRS Newswire IR-2020-59 (3/25/2020), but also affected by the 3/27/30 IRS Memo “Evacuate the workplace”.

- For taxpayers under an existing Installment Agreement, payments due between April 1 and July 15, 2020 are suspended. Not sure what that means for taxpayers on a direct debit IA. I would expect guidance any day.
- New installment agreements. Not sure how to apply.
- Pending Offer In Compromise (OIC): All requirements (Payments, compliance, information requests, etc.) have been delayed until 7/15/2020.
- New OIC: This is the time to submit new OIC and Partial Pay Installment Agreements (PPIA). If your taxpayer is making less money since the crisis began I would be filing now. These can be submitted or amended by mail per the instructions.
- Automated Liens and Levies – **New** automatic, systemic liens and levies will be suspended during this period.
- Existing liens and levies? Nobody knows the answer to this. If the IRS is not answering the phones not sure how to get a levy or lien stopped. Expect more guidance and additional information later in this presentation about options.

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Interest Continues To Accrue

Penalties can be abated but the interest on any delinquent tax debt will continue to accrue. The IRS reiterates this in IR-2020-59

“By law, interest will continue to accrue on any unpaid balances.”

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Polling Question #1

Remember to get credit for the webinar you need to stay logged in for at least 50 minutes and answer all four polling questions.

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What can I do with the IRS?

- **E-File Returns**
 - 2018 and 2019. Expect increased demand due to the Stimulus Requirements.
- **Taxpayer can sign up for an online account**
 - Get transcripts without a 2848/8821.
 - Apply for an Online Payment Agreement (Very buggy.)
 - Modify an existing agreement
 - Change your monthly payment amount (this is a listed option). Cannot change value under the minimum payment amount for a full pay.
 - View balances
- ~~Getting reports that the Taxpayer line and the small business line may be operating at very reduced capacity.~~ UPDATE: The lines went offline today (3/31/20)
 - I would only use these for issues that cannot wait and I would be prepared to wait on hold.
 - In my opinion I believe the IRS will staff taxpayer services before they staff practitioner services.
- **Taxpayer Advocate Service**
 - Indicated some staff is working from home (tele-working) and may be available to a limited extent.
 - This may be an option for lien and levy holds.

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Registered Mail

I would recommend tracking any correspondence sent to the IRS (always a good practice), but I would not request a signature since nobody is there to sign which would prevent the “delivery” of the correspondence. I saw a memo earlier this week from tax court or appeals advising this and it makes sense. Basically nobody was going to be present to “sign”.

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CAF Units

Philadelphia, Memphis and Ogden CAF units are all currently offline (subject to change anytime). Ogden went offline on 4/6/2020. The CAF units should be some of the first units to start back up since they are mission critical and were the last to stop.

The lines ring busy because the IRS has no way to replenish the ink and paper in the printers. The IRS Secure Fax does not store the inbound faxes electronically.

The CAF units process First In First Out in the order received. Per the 8821/2848 instructions these forms can be mailed and in theory they would be processed in the order received.

IRS IRM 21.3.7.1.3 (09-13-2017) Audience-Processing Sites (CAF Function)

7. The CAF Function that receives the authorization is responsible for processing to the CAF, regardless of the state mapping.

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IRS e-Services & Transcript Delivery System Will Remain Available

Our IRS contacts have verified that these services will not be shut down and will remain available.

This is currently stated on the IRS Mission Critical Status Page:
"Please make IRS.gov your first option for answers to questions.

Practitioners with e-Services accounts and with client authorization can access the Transcript Delivery System to obtain prior-year transcripts. Taxpayers should use Where's My Refund? and Get Transcript, both common requests."

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Taxpayer Advocate Service

Web page on IRS.gov (not their primary site): <https://www.irs.gov/taxpayer-advocate>

From the Taxpayer Advocate IRS Home Page:

“COVID-19 Update

The Taxpayer Advocate Service (TAS) wants you to know that the safety and concern for our taxpayers and employees continues to be our highest priority. Currently, TAS remains open to receive phone calls at the local phone numbers [listed here](#), but due to the coronavirus TAS is suspending walk-in services until further notice. If you have an open TAS case and need assistance, please reach out to your assigned Case Advocate by phone. If you are having a tax problem and have not been able to resolve it directly with the IRS, you can call your local taxpayer advocate.”

The “local numbers” this statement refers to is a link on that web page that takes you to a page that requires you to enter your state for the local number.

Currently the main number for Taxpayer Advocate is not being answered. Only the local numbers described above.

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IRS Tax Payer Online Account Features

There are several services a tax payer can access with an IRS Verified Online Account:

- IRS Get Transcripts
- **Online Payment Agreement** (Very Buggy) – This can also be accessed by a tax professional who has 2848 authority for the tax payer. This is a great way to get an installment agreement set up without talking to anyone at the IRS and completing a 433.
 - Requirements:
 - Long-term payment plan (installment agreement): You owe \$50,000 or less in combined tax, penalties and interest, and filed all required returns.
 - Short-term payment plan: You owe less than \$100,000 in combined tax, penalties and interest.
- **Identity Protection Pin Application (IP PIN)** - The IRS IP PIN is a 6-digit number assigned to eligible taxpayers to help prevent the misuse of their Social Security number on fraudulent federal income tax returns.
 - A taxpayer can apply online or be assigned one from the IRS with a CP01A Notice.
- View Your Account Information
 - View your current pay off amount.
 - Make payment or set up an installment agreement from the dashboard.

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IRS Online 2848/8821 & e-Signatures

- THS is currently a part of the IRS e-Services focus group on online 2848. There should be a solution in the next 18 months, but it will not help with the current situation.
- Under the Taxpayer First Act the IRS was directed (by law) to publish guidance on the use of e-Signatures for the 2848/8821 by January 1, 2020.
 - The IRS published IRS IRM 10.10.10.1 IRS Electronic Signature (e-Signature) Program on 12/3/2019, but they did not include the 2848/8821 in guidance even though that was the primary purpose of 10.10.10.1
- The IRS did issue internal guidance on 3/30/2020 (Stakeholder Liaison sent the e-mail out) that indicates under limited circumstances the IRS will allow digital signatures for 2848's but I interpret this as a narrow scope when allowed by a Revenue Officer or Examiner working from home.
 - "any other statement or form needing the signature of a taxpayer or representative traditionally collected by IRS personnel outside of standard filing procedures (for example, **a case specific Power of Attorney**)."
 - Some practitioners interpreted this to mean all 2848. (Facebook rumor. Use Caution.)

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Cost For The IRS To Interact With The Public

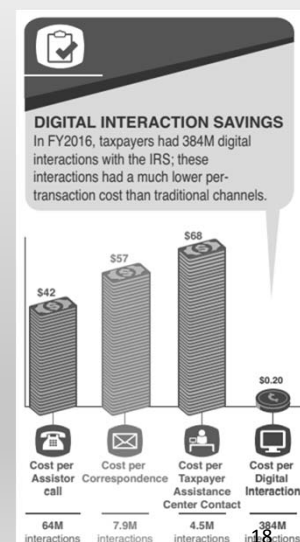
In its FY 2018-2022 Strategic Plan, IRS estimated that it costs:

- \$42 to interact with a taxpayer over the phone
- \$57 through mail correspondence
- \$68 at a Taxpayer Assistance Center
- \$0.20 per digital interaction.

This is why the IRS is committed to more online and digital interactions with the public.

I wonder what the cost is to process an 8821/2848?

Because of this the IRS has recognized a problem and has created a "Future State" Policy to address these costs.



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If You Need IRS Transcripts & You Do Not Have CAF Authority

- IRS Get Transcripts is your only option until the call centers come back online.
- The same credentials can be used for Get Transcripts, OPA, Online Account, Identity Protection Pin (IP PIN).
 - Get Transcripts has a higher validation than the rest (cell phone and credit verification). Some of the others are an "or".
- Business transcripts, separate assessments, and civil penalty transcripts are not available through Get Transcripts.
 - The only option for business transcripts currently without CAF Authority is to get a hold of somebody on the business line or possibly the 1040 line and have them sent to your e-Services Mailbox.
- All transcripts are redacted through Get Transcripts (even the Wage & Income Transcripts that are not redacted through e-Services).

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Polling Question #2

Remember to get credit for the webinar you need to stay logged in for at least 50 minutes and answer all four polling questions.

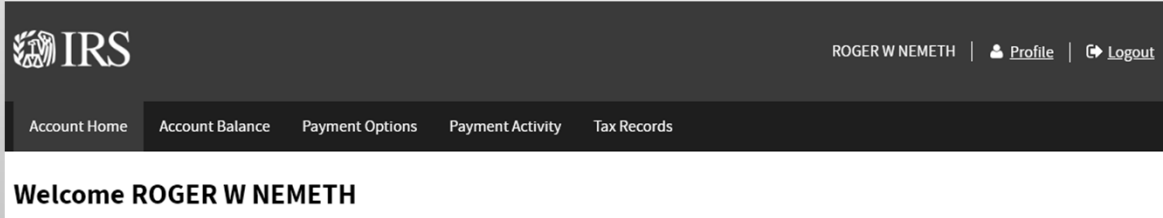
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The New IRS Online Taxpayer Account

The following pages show the available information available with the Online Taxpayer Account.

Get Transcripts, OPA, and IP PIN all have direct login links on IRS.gov or they can all be accessed through the Online Taxpayer Account.



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Account Balance

Account Balance

Total Amount Owed

Please view your tax information in the Amount Owed By Year section.

The information provided is based on our current data.

The numbers here may not reflect:

- Recently filed or processing returns
- Pending payments or adjustments
- Information on your business account
- Installment agreement fees

[GO TO PAYMENT OPTIONS](#)

[Frequently Asked Questions About Balances](#)

Amount Owed By Year

Tax Year

You Owe

2019

INFO

Income Tax

You Have Payments to Claim on Your Tax Return When You File

Our records show you have payments applied to your account which need to be claimed on your tax return.

Type	You Paid
Estimated Tax Payments	\$1,000.00
2018	\$32,513.00
2017	\$0.00
2016	\$11,926.00

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Payment Options

Payment Options

Pay Now

Pay in full today to minimize any penalty and interest charges. Make a full or partial payment from your bank account or through any of the methods listed below. If using different payment methods, you will need to re-enter your personal information.

Have this Information Handy

To verify your identity, you will need from a tax return within the last six years:

- Tax return details: tax year, filing status
- Personal information: name, address, date of birth, Social Security Number or Individual Taxpayer Identification Number

Pay by Bank Account

Pay from your bank account by using IRS Direct Pay, a separate and secure IRS online system.

[GO TO IRS DIRECT PAY](#)

Pay by Debit or Credit Card

Fees apply when paying by card. You will pay on the separate and secure website of an IRS-approved payment processor.

[GO TO CARD OPTIONS](#)

Pay by Check or Money Order

You may [pay by check or money order](#).

Create a Payment Plan

If you can't pay now and need more time to pay, payment plan options may be available to you.

Apply for the payment plan that best fits your needs.

- A **Short-term payment plan** allows you up to 120 days to pay in full.
- A **Long-term payment plan (installment agreement)** allows you to make monthly payments on your balance.

For more information about how to create a payment plan, see [answers to common questions](#).

Create A Payment Plan Now

[GO TO PAYMENT PLANS](#)

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Payment Activity

Payment Activity

Processed Payments

View payments made in the past 5 years. Note that payments may take 1 to 3 weeks to be shown here.

This list does not include tax withholding.

Date	Tax Year	Type	Amount
Sep 12, 2019	2019	Estimated Tax Payment	\$10,000.00
Apr 18, 2019	2018	Payment	\$2,217.00

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Tax Records

Tax Records

2018 Summary

View key information from your most recent tax return as originally filed.

Form Filed	1040
Filing Status	Married Filing Jointly
Adjusted Gross Income	\$91,695.00

Get Transcripts Online

View, print or download information from your tax returns, account transcripts, W-2s, 1099s, and more.

[GET TRANSCRIPT](#)

Get Transcripts

Get Transcript

Select a reason you need a transcript:

Customer File Number: [GO](#)

You selected: Federal Tax
We suggest you download: Record of Account Transcript

Below are the transcripts and years available.

Return Transcript	Record of Account Transcript
N/A	N/A
2018	2018
2017	2017
2016	2016

Account Transcript	Wage & Income Transcript
2019	2019
2018	2018
2017	2017
2016	2016

[Show All](#) [Show All](#)

Glossary

Return Transcript
Tax Return Transcripts show most line items from your tax return (Form 1040, 1040A or 1040EZ) as it was originally filed, including any accompanying forms and schedules. This transcript does not reflect any changes you, your representative or the IRS made after you filed your return. In many cases, a Return Transcript will meet the requirements of lending institutions offering mortgages and student loans.

Record of Account Transcript
Record of Account Transcripts combine the information from tax account and tax return transcripts.

Account Registration Best Practices

In 2018 when the IRS forced 300,000 tax pro's to go through the new enhanced verification processes the staff at Tax Help Software got very good at getting tax pros through the process successfully. These same best practices are now being shared with you to do the same with your own clients if you choose to do so.

If the online account registration fails the taxpayer can still validate their identity, but it will take some time so the IRS can send a letter to their last known address with a validation code.

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Pre-Qualify Your Client

Check with your client to determine if they have enough information to attempt to create an online account:

1. The tax payer must have US Based mobile phone that matches the name on the account.
 - Phones registered in the business name, land lines, Voip phones, pre-paid phones and virtual phones like Google Voice will not verify in the system.
2. A credit card in the tax payers name that is not a pre-paid card, debit card, American Express Card, or a business card.
 - We recommend a Visa or Mastercard, but Discover is supposed to work as well.
 - In lieu of a credit card you can try the account numbers for a home mortgage loan, home equity loan, home equity line of credit, student loan or a car loan.
3. A readily available e-mail address. A new G-Mail can be created prior to registration.
4. Social Security Number (we do not believe ITIN's will work).
5. Must have filed a return in the last 7 years and know the last filing status of the last return filed. There is a six week delay before current returns show up in the system.
6. If the tax payer has a credit freeze with Experian it will need to be temporarily lifted before an attempt is made.

If the client does not have all of this information you can still try but our recommendation is an 8821/2848 or apply and request a validation via US Mail and a confirmation code.

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Reasons For Registration Failures

The three primary reasons online registration fails:

1. The cell phone for the tax payer is not in their name. (Account for over 90% of the failures)
2. The tax payer chooses a Credit Card that does not qualify (Amex, debit card, etc.).
3. The tax payer has a credit freeze with Experian.

By using the following best practices you can vastly improve your client's chances of a successful registration.

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Cell Phone Validation Best Practices

- If the client does not have a cell phone with the account in their name they will not be able to validate online.
- If the taxpayer is married you can try both cell phones.
- Land lines, Voip phones, pre-paid phones and virtual phones like Google Voice will not verify in the system.
- If the tax payer does not have a cell phone in their name they can request a letter with a confirmation code be sent to their address on their last filed return.
- THS has created a feature in the software that will check your client's account name on the phone. The account name and the caller ID are different. Users can control the caller ID in their cell phone accounts. By checking the cell phone in advance you can save time and determine if it is worth trying.

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**Can you guess the online
registration success rate?**

28%

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Polling Question #3

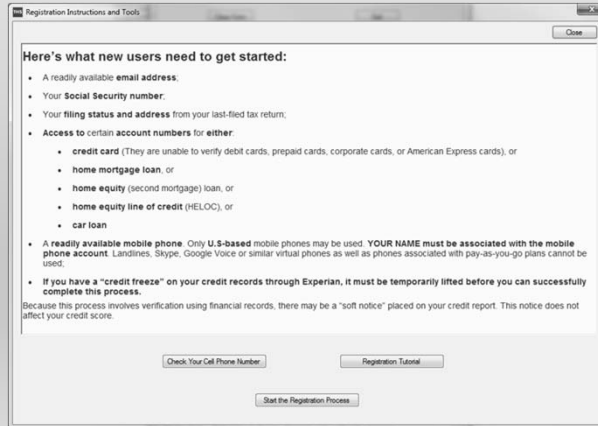
Remember to get credit for the webinar you need to stay logged in for at least 50 minutes and answer all four polling questions.

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The THS Cell Phone Verification Tool

- This tool should be used to validate the tax payer’s cell phone is in their name before attempting to register.
 - We will not know how effective the validation is until a larger number of phone numbers is checked through the system.
 - During initial testing on 20+ numbers it was a high probability indicator.



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THS Cell Phone Validation Tool Result

Verify Your Cell Phone Number

We first need to verify your phone number. Enter your cell phone number below then click Request Code and a 6 digit verification code will be sent to your cell phone.

Enter your cell phone number

Enter Verification Code

Full Name	<input type="text" value="Roger Nemeth"/>	Carrier	<input type="text" value="Verizon Wireless"/>
First Name	<input type="text" value="Roger"/>	Type	<input type="text" value="Mobile"/>
Middle Name	<input type="text"/>	Is Prepaid?	<input type="text"/>
Last Name	<input type="text" value="Nemeth"/>	Is Commercial?	<input type="text" value="false"/>
		Is Valid?	<input type="text" value="true"/>

Name returned.

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THS Cell Phone Validation Tool Result

My wife's number returned with no name. She uses Straight Talk which is considered a pre-paid plan.

Verify Your Cell Phone Number

We first need to verify your phone number. Enter your cell phone number below then click Request Code and a 6 digit verification code will be sent to your cell phone.

Enter your cell phone number

Enter Verification Code

Full Name	<input type="text"/>	Carrier	<input type="text" value="Verizon Wireless"/>
First Name	<input type="text"/>	Type	<input type="text" value="Mobile"/>
Middle Name	<input type="text"/>	Is Prepaid?	<input type="text"/>
Last Name	<input type="text"/>	Is Commercial?	<input type="text"/>
		Is Valid?	<input type="text" value="true"/>

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Screen Shots From The Actual Registration Process

IRS

You will need to register in order to use this service

Registration is


- Fast:** Signing up only takes about 15 minutes
- Secure:** Only you will have access to your tax information
- Convenient:** you will only need to verify your identity once
- Free:** There is no charge to sign up (Message and data rates may apply to send a security code to your mobile phone)

Before we get started, we're going to ask you some simple questions to make sure you have everything you need.

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You will need some information about yourself to register

Please have the following information and materials to complete registration:

- Full Name
- Email
- Birthdate
- Social Security Number (SSN) or Individual Tax Identification Number (ITIN)
- Tax filing status
- Current address

Do you have this information available?

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You need a financial account to register

To verify your identity, we will need a number from ONE of your financial accounts. We can use any of the following:

- Credit Card OR
- Student Loan OR
- Mortgage or Home Equity Loan OR
- Home Equity Line of Credit OR
- Auto Loan

You will only need to provide the loan account number or a few digits from a credit card number. We only use this information to verify your identity. **You will not be charged any money and are not sharing any account balances or other financial information with us.**


A soft inquiry will show up on your credit report to let you know that the IRS accessed your credit report information. This will not increase or decrease your credit score and lenders will not be able to see this.

Do you have this financial information available? (If you don't have the account information on hand, you should answer 'No'.)

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You need a mobile device

We'll need one more way to verify your identity. The easiest way is with a mobile phone.

Your phone must be

- A U.S.-based mobile phone number registered in your name
- Able to receive text messages

It may **NOT** be a landline, Skype, Google Voice, or a virtual number.

If you don't have a mobile phone meeting those criteria, you can complete identity verification by receiving a letter in the mail. To complete registration, you will still need a U.S.-based mobile phone capable of receiving text messages, or an iPhone, iPad, or Android device.

[Exit Registration](#)

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Let's Get Started!
It sounds like you have all the necessary information available and can begin.

First Name (as it appears on your most recent tax return)
[Santa]

Last Name (as it appears on your most recent tax return)
[Claus]

Email Address
[sclaus@aol.com]

Confirm Email Address
[sclaus@aol.com]

A confirmation code will be sent to your email address. You will need to get the code and enter it on the next screen.

SEND CODE

Check Your Email
We just sent a confirmation code to [sclaus@gmail.com]. This code is valid for 15 minutes. Open your email in a new window to get your confirmation code.

IMPORTANT: Keep this window open to avoid having to start over.

Enter the one-time code we emailed you:
[12345678]

Didn't receive the confirmation code? [Resend the email](#)

CONTINUE

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Help us verify your identity with some basic information

If we are not able to match the information you enter with our records, you will not be able to use this online service but other options are available to you.

Personal Information
All information should match your latest tax return.

First Name
[David] [Edit](#)

Last Name
[Register] [Edit](#)

Date of Birth
[Month] [Day] [Year]

Social Security Number (SSN) or Individual Tax ID Number (ITIN)
[]-[]-[]-[]-[]-[]

Filing Status

I have filed a tax return in the past seven years

Select filing status from your most recently filed tax return

I have not filed a tax return in the past seven years

Address Information
Your address must match your most recently filed tax return. [Address Help](#)

Address Line 1
[]

Address Line 2 (Optional)
[]

City
[]

State / Territory [] Zip Code [] Country [United States]

Filing Status

I have filed a tax return in the past seven years

Select filing status from your most recently filed tax return

I have not filed a tax return in the past seven years

Address Information
If you have not filed in the past 7 years, provide your current mailing address.

Address Line 1
[]

Address Line 2 (Optional)
[]

City
[]

State / Territory [] Zip Code [] Country [United States]

Not sure what the process is if tax payer has not filed in the past 7 years. They ask for your current address so they can send an RO by.

Just kidding, but maybe not!!!

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Verify your financial account number

To prevent identity theft and protect the security of your tax information, you will need to verify your identity.

Provide one of the following active account numbers:

- Last 8 digits of credit card
1234-5678 X
(We are unable to verify debit cards, corporate cards, or American Express cards)
- Student loan account number
- Auto loan account number
- Mortgage or home equity loan account number
- Home equity line of credit account number
- I don't have a current credit card, student loan, auto loan, home equity loan, or mortgage

Financial account information
We will only use this information to verify your identity. You will not be sharing any money and are not sharing any account balances with us.

A soft inquiry will show up on your credit report to let you know that the IRS accessed your credit report information. This will not increase or decrease your credit score and lenders will not be able to see this.

If you have a credit freeze, you authorize us to bypass that freeze to verify your identity.

If you do not wish to or cannot provide the information, you will not be able to register but other options are available to you.

By providing financial account information, I authorize the IRS to access my credit report for the purpose of verifying my identity.

CONTINUE

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Verify your phone number

⚠ We were unable to verify that this phone number belongs to you with the phone provider. Please double check that your phone number was typed correctly or try a different number.

We need to verify that your personal information matches the subscriber information for your US-based mobile phone account. By continuing, you authorize your wireless carrier to disclose information to the IRS and its third-party service providers about your account, such as subscriber status, device details and plan type, if available, to support identity verification and fraud prevention. See our Privacy Policy for how we treat your data.

We may not be able to verify all mobile phone numbers. We can't verify landlines, some prepaid phones, or virtual phone numbers like Google Voice.

Enter your mobile phone number:

CANCEL **SEND MESSAGE**

By continuing, you opt-in to receive a one-time code via text message or phone call each time you log in. Message and data rates may apply. We won't use your phone number for any other communication.

Don't have a mobile phone or can't verify your phone number? Try these alternative options.

Receive an activation code by postal mail (~10 business days). Selecting this option will allow you to create your username and password, but you won't be able to access the online service today. You'll need to come back to activate your account after you receive the activation code in the mail.

[Review alternatives to using this online service.](#) These options will not allow you to complete registration for this online service.

[IRS Privacy Policy](#) | [Security Code Terms and Conditions](#) | [Accessibility](#)

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Slam Dunk Failure

The screen shots on the previous slides came from David, my Brother-In-Law allowing me to capture them. He met all the criteria we listed previously and the THS Cell Phone Validation Tool was not ready yet.

David had a cell phone account with Verizon in his name for about 18 months. His cell phone did not validate on the IRS web site (that is why I do not have a screen shot of the success screen). When we got the cell phone validation tool to work a name we did not recognize came up in a different city. We believe that the database the IRS is using is not updating when phone numbers have switched users or what ever happens in the process. We are sharing these results with the IRS in an effort that they can improve the process.

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Summary

- For the immediate future the taxpayer self-help tools and IRS e-Services will be the best initial option.
- Any option requiring a phone call will have to rely on non-traditional lines. Call Centers will be staffed for the Taxpayer first (Taxpayer line and small business line). UPDATE: Today (3/31/20) these lines went down.
- Taxpayer Advocate is also an option through the local numbers.
- If a 2848 or 8821 needs to be submitted currently (subject to change daily) Ogden CAF Unit via Fax and any unit via US Mail. Processing times will be high.
- Tax Professionals need to be patient and intuitive in dealing with taxpayer issues.

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Polling Question #4

Remember to get credit for the webinar you need to stay logged in for at least 50 minutes and answer all four polling questions.

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QUESTIONS?

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Please be advised I do not do case consultations from webinars.

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