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Feb. 14, 2019



Department of the Treasury **Internal Revenue Service**

In an effort to prevent tax fraud, taxpayers and tax professionals will be required to verify their identities if they call the IRS.

The days before and after Presidents Day mark the peak period for taxpayer phone calls to the IRS. To avoid the rush, callers should use [IRS.gov](https://www.irs.gov) to access resources like

the [IRS Service Guide](#), to answer their questions or be prepared to verify their

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taxpayers to have the following information ready:

- Social Security numbers (SSN) and birth dates for those who were named on the tax return
- An [Individual Taxpayer Identification Number](#) (ITIN) letter if the taxpayer has one in lieu of a SSN
- Filing status – single, head of household, married filing joint or married filing separate
- The prior-year tax return. Telephone assistors may need to verify taxpayer identity with information from the return before answering certain questions
- A copy of the tax return in question
- Any IRS letters or notices received by the taxpayer

Confirming third-party authorizations during calls

By law, IRS telephone assistors will only speak with the taxpayer or to the taxpayer's [legally designated representative](#).

If taxpayers or tax professionals are calling about a third party's account, they should be prepared to verify their identities and provide information about the third party they are representing. Before calling about a third-party, be sure to have the following information available:

- Verbal or written authorization from the third-party to discuss the account
- The ability to verify the taxpayer's name, SSN/ITIN, tax period, and tax form(s) filed
- Preparer Tax Identification Number ([PTIN](#)) or PIN if a third-party designee
- A current, completed and signed [Form 8821](#), Tax Information Authorization or
- A completed and signed [Form 2848](#), Power of Attorney and Declaration of Representative

Questions regarding a deceased taxpayer require different steps. Be prepared to fax:

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[Topics](#), [Frequently Asked Questions](#), [Tax Plans](#) and the [IRS Tax Map](#) to get faster answers. Taxpayers wanting more information about the Tax Cuts and Jobs Act should review: [Publication 5307](#), Tax Reform: Basics for Individuals and Families, or [Publication 5318](#), Tax Reform What's New for Your Business.

Some taxpayers also make in-person monthly or quarterly tax payments. Those payments can be made online by using [IRS Direct Pay](#) or through the [Electronic Federal Tax Payment System](#). Taxpayers seeking free tax preparation assistance should explore the [Volunteer Income Tax Assistance](#) (VITA) Program for in-person help or IRS [Free File](#) if they want to prepare their return themselves. The [IRS Services Guide](#) links to many IRS online services.

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