INTERNAL REVENUE SERVICE

IRS News Release

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Avoid the Rush: Be Prepared to Validate Identity if Calling the IRS

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WASHINGTON – The Internal Revenue Service said mid-February marks the agency's busiest time of the year for telephone calls. The IRS is reminding taxpayers who have questions about their tax accounts to be prepared to validate their identity when speaking with an IRS assistor. This will help avoid the need for a repeat call.

The IRS recognizes the importance of protecting taxpayers' identities. That's why IRS call center assistors take great care to make certain that they only discuss personal information with the taxpayer or someone authorized to speak on the taxpayer's behalf.

Customer service representatives can answer refund questions beginning 21 days after the return was filed. Taxpayers should use "Where's My Refund?" to track the status of their refund. Taxpayers who are e-filing their return and need their prior year adjusted gross income should use the Get Transcript tool on IRS.gov. IRS telephone assistors cannot provide prior-year adjusted gross income over the phone for filing purposes.

"Where's My Refund?" will be updated Feb. 18 for the vast majority of early filers who claimed the Earned Income Tax Credit or the Additional Child Tax Credit. Before Feb. 18, some taxpayers may see a projected date or a message that the IRS is processing their return.

By law, the IRS is required to hold EITC and ACTC refunds until Feb. 15. However, taxpayers may not see those refunds until the week of Feb. 27. Due to differing timeframes with financial institutions, weekends and the Presidents Day holiday, these refunds likely will not start arriving in bank accounts or on debit cards until the week of Feb. 27 -- if there are no processing issues with the tax return and the taxpayer chose direct deposit.

The IRS phone assistors *do not* have additional information on refund dates beyond what taxpayers have access to on "Where's My Refund?". Given high call volumes, taxpayers should not call unless directed to do so by the refund tool. In addition, a common myth is that people can get their refund date earlier by ordering a tax transcript. There is no such "secret" option to find a refund date by calling the IRS or ordering a transcript; just check "Where's My Refund?" once a day.

If Calling About a Personal Tax Account

Before calling about a personal tax account, have the following information handy:

- Social Security numbers and birth dates for those listed on the tax return
- An Individual Taxpayer Identification Number (ITIN) for those without a Social Security number (SSN)
- Filing status – Single, Head of Household, Married Filing Joint or Married Filing Separate
- Prior-year tax return. The IRS may need to verify identity before answering certain questions
- A copy of the tax return in question

- Any letters or notices received from the IRS.

If Calling About a Letter 4883C

At this time of year, the IRS begins sending letters to taxpayers inquiring about suspicious tax returns it has identified. It's important for the IRS and the taxpayer to confirm whether or not the taxpayer actually filed the return in question. Taxpayers have 30 days to call, which allows time to avoid the rush around Presidents' Day.

To expedite the process when calling, taxpayers MUST have:

- The IRS letter
- Copy of prior year tax return (if filed)
- Current year tax return (if filed)
- Any supporting documents for each year's return (such as W-2's, 1099's, Schedule C, Schedule F, etc.)

If Calling About Someone Else's Account

IRS call center assistors **will only speak with the taxpayer or their** legally designated representative. Before calling, have the following information handy:

- Verbal or written authorization to discuss the account
- The ability to verify the taxpayer's name, SSN/ITIN, tax period, form(s)
- If the caller is a third party designee, a PTIN or PIN must be provided
- A current, completed, and signed Form 8821, Tax Information Authorization or
- A completed and signed Form 2848, Power of Attorney and Declaration of Representative

If Calling About a Deceased Taxpayer

Be prepared to fax:

- The deceased taxpayer's death certificate, **and**
- Either copies of the Letter of Testamentary approved by the court or IRS Form 56, Notice Concerning Fiduciary Relationship (for estate executors)

To better serve taxpayers around the President's Day holiday, the peak time of the year for telephone calls to the IRS, the IRS toll-free lines will be open Saturday, Feb. 18, from 9 a.m. to 5 p.m. (callers' local time) and Monday, Feb. 20, from 7 a.m. to 7 p.m. (callers' local time).

This tip is part of the IRS Avoid the Rush news release series designed to provide taxpayers with the information they need, when they need it. More details on this series, including information on additional online resources, are available on IRS.gov.