



IRS Nationwide Tax Forum | 2023

Identity Assurance (IA) – Identity Verification for Tax Professionals

Presenter: Privacy, Governmental Liaison and Disclosure (PGLD)

Objectives

This session will address the following:

- Authentication - Why it's Important to You and Your Clients
- Benefits of the Modernized Identity Verification Platform
- Identity Verification Overview
- Key Takeaways and Look Ahead

Authentication – Why it’s Important





Authentication is the identity proofing process of establishing that someone is who they say they are and confirming that the previously identified person is who they claim to be.

- Identity proofing ensures that you are you
- Authentication ensures that you are still who you say you are for returning users

Proper authentication is essential to the protection of taxpayer data from fraudsters and identity thieves and enables IRS to expand digital service offerings.

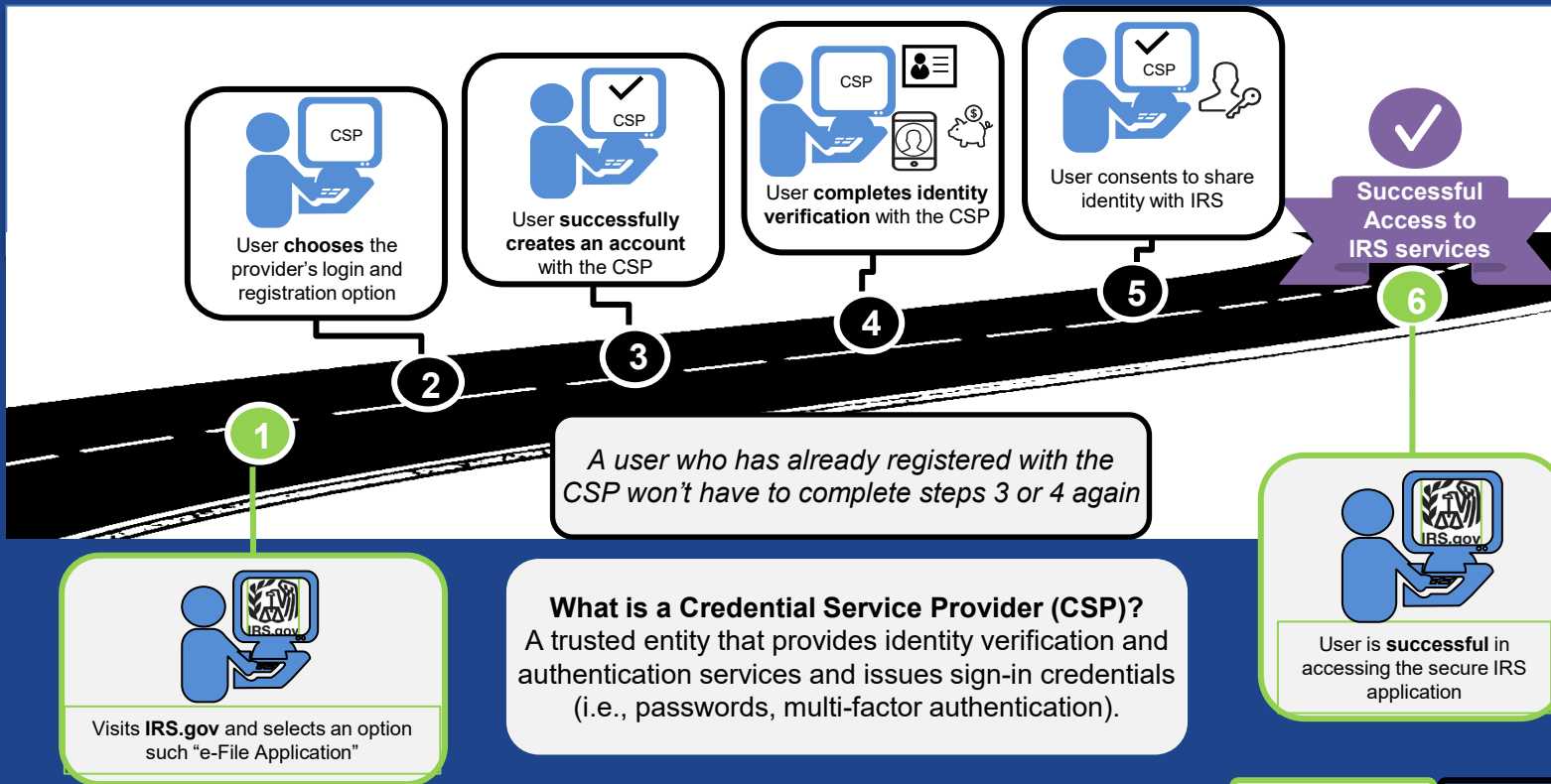
Modernized Digital Identity Platform Benefits

The modernized digital identity platform complies with federal guidelines and provides improved access to online services, while protecting taxpayer data and IRS systems.

Access to IRS Online Services	Compliant with Federal Guidelines
<ul style="list-style-type: none"> ✓ Enables access to tax information and services 	 ✓ Meets National Institute of Standards and Technology (NIST) Special Publication 800-63-3 Digital Identity Guidelines
<ul style="list-style-type: none"> ✓ Helps drive online engagement with taxpayers 	 ✓ Maintains authentication protocols at multiple levels of assurance
<ul style="list-style-type: none"> ✓ Protects taxpayer data against malicious activity and threats 	 ✓ Assesses the risk of each application per OMB requirements
<ul style="list-style-type: none"> ✓ Reduces burdens on non-digital channels (e.g., paper, phone) and service costs to the IRS 	 ✓ Enable federation, including the ability to accept credentials from technology providers or Credential Service Providers (CSPs) to support greater choice for users

Identity Verification Overview

This flow outlines how a user will access IRS online services through our current Credential Service Provider.

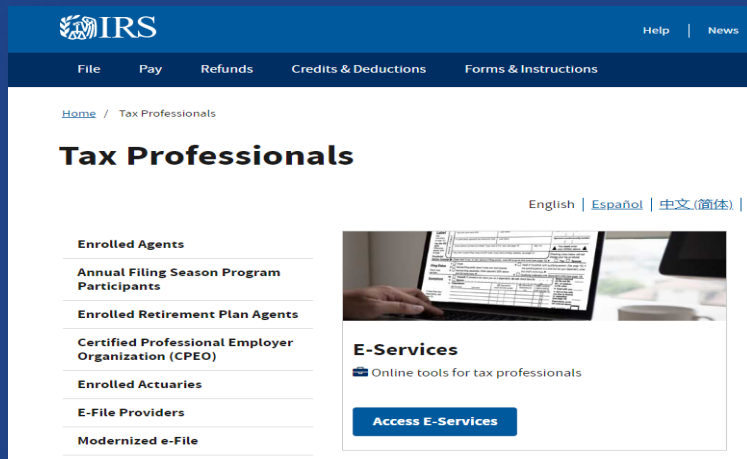


IRS Online Services: New User Registration

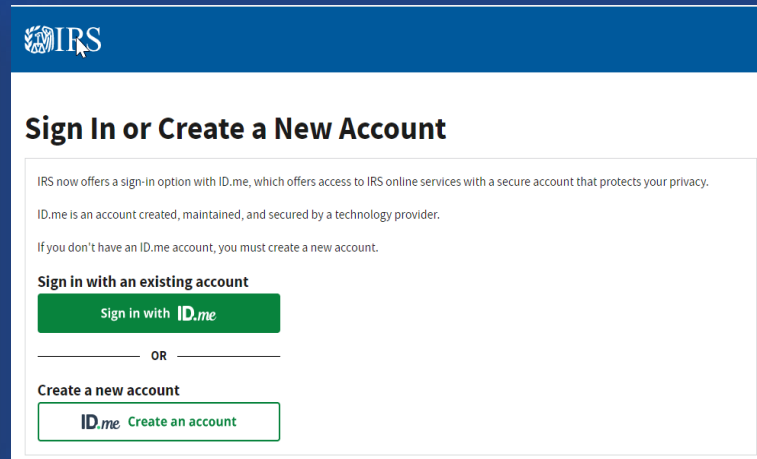
Users are prompted to sign in or register with ID.me to access IRS Online Services.

The option to sign in with a legacy IRS username was retired on June 2, 2023.

Step 1: Select an IRS Online Application



Step 2: Select ID.me Create an Account



ID.me New User Registration

Step 1: Create an ID.me account

- Enter your e-mail address and create a password.

Step 2: Set Up Multi-Factor Authentication

- Select from text message or phone call, push notification, code generator, or accepted hardware authentication device.

ID.me + IRS

Create an ID.me account

Already have an ID.me account?
[Sign in to ID.me](#)

Email
Enter your email

Password
Enter your password

Confirm Password
Confirm your password

I accept the ID.me [Terms of Service](#) and [Privacy Policy](#)

Create account

OR

f G A in

[View more options](#)

English

What is ID.me? | [Terms of Service](#) | [Privacy Policy](#)

SECURE YOUR ACCOUNT

Setup multi-factor authentication

We recommend securing your account with multi-factor authentication. With multi-factor authentication, even if someone guesses your password, they can't sign in as you. You'll only need to verify your identity once.

What does this mean?

Set up multi-factor authentication

What is ID.me? | [Terms of Service](#) | [Privacy Policy](#)

ID.me Identity Verification Options

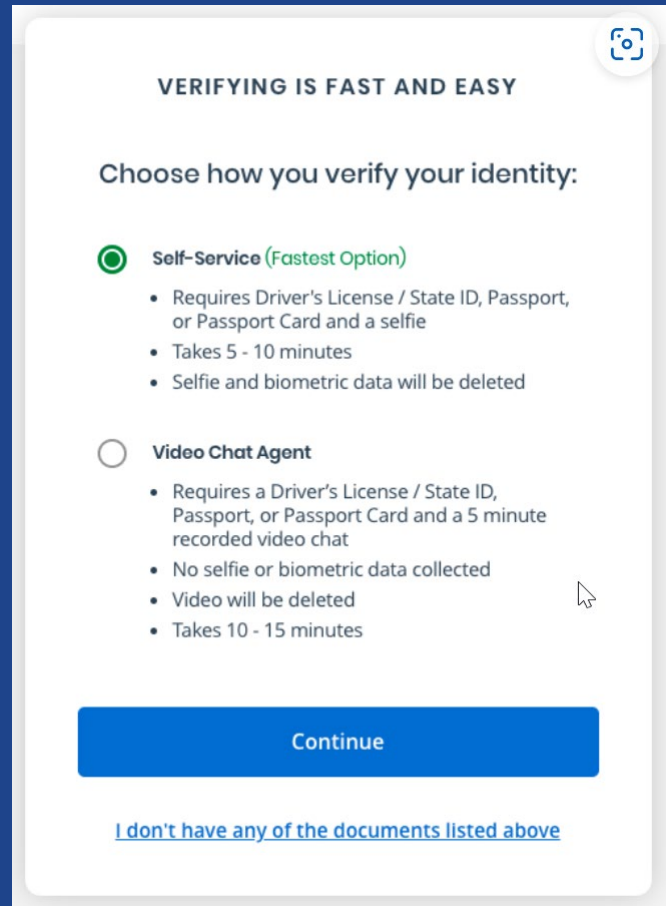
ID.me offers two pathways to verify your identity for access to IRS online services:

Verify via Self-Service

- Requires government issued photo ID
- Requires a selfie
- Takes 5 - 10 minutes

Verify During a Video Chat

- Accepts a broader list of identity documents
- You're able to speak to an ID.me video chat agent
- No selfie or biometric data collected
- Time to verify varies depending on demand



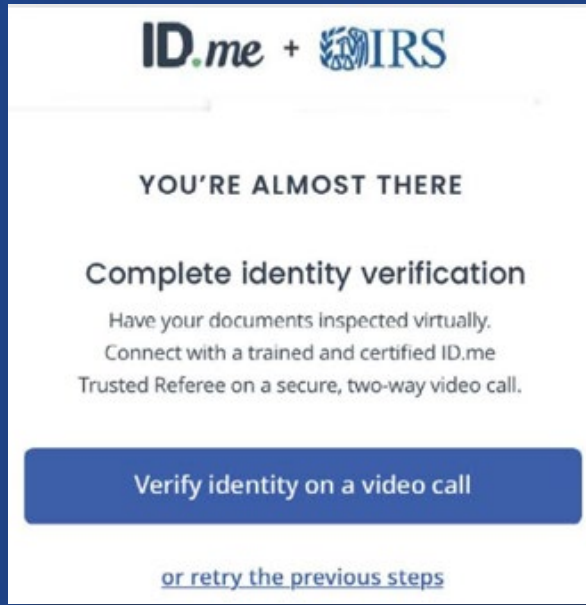
ID.me Customer Support

If you're unable to verify via the self-service verification process, you'll see a screen inviting you to verify your identity with an ID.me video chat agent.

ID.me Customer Support

ID.me offers 24/7 multilingual support across multiple service channels.

Additional resources are available at help.id.me, which includes the option to submit a support ticket.



Key Takeaways and Look Ahead

The e-Services applications have transitioned to the modernized identity verification platform, which requires users to register and sign in with our current technology provider.

- Don't wait to create your account to access IRS online services
- Users have two options to register for a new account; self-service workflow or a video chat verification option
- The support offered by our technology provider will replace the legacy Secure Access exception process previously offered by the IRS e-Help Desk

Look Ahead...