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Form **15439**  
October 2023Department of the Treasury - Internal Revenue Service  
**IRS Identity Authentication Process Survey**OMB Number  
1545-1432

The Taxpayer Advocate Service, an independent organization within the IRS, and the IRS's Wage & Investment Division (W&I), are asking you to participate in a short survey. This survey is collecting information from taxpayers regarding their experience when authenticating their identity with the IRS. When the IRS suspects a return might have been filed by an identity thief, it will contact the taxpayer and ask them to verify their identity prior to issuing a refund. Your cooperation in answering these questions will help ensure that you – whether a taxpayer or tax professional – receive fair, courteous and timely treatment from the IRS.

**1. The IRS sent you Letter XX around DD/MM/YEAR. How helpful was the information provided in the letter? If you found the letter unhelpful, you can note how the letter can be improved at the end of this survey.**

- ☐ I did not receive letter
- ☐ Very unhelpful
- ☐ Unhelpful
- ☐ Neither helpful nor unhelpful
- ☐ Helpful
- ☐ Very helpful

**2. If you responded more than 30 days after receiving a letter from the IRS requesting you verify your identity prior to receiving your tax year 2022 refund, what was reason for delay in authenticating your identity? (Select all that apply.)**

- ☐ Verified my identity within 30 days
- ☐ Personal reasons
- ☐ Forgot about letter, didn't open envelope, or didn't read letter
- ☐ Questioned legitimacy of letter
- ☐ Didn't understand the letter
- ☐ Had difficulty navigating the online system
- ☐ IRS phone line was busy
- ☐ I was delayed in getting an appointment at a Taxpayer Assistance Center (TAC)
- ☐ Other (specify in box below)

**3. When you attempted to verify your identity with the IRS, how did you do so? (select all that apply)**

- ☐ Online   ☐ By phone   ☐ In-person (at a Taxpayer Assistance Center)   ☐ By mail

**4. How easy was it to compile all the materials and information you needed?**

- ☐ Very difficult   ☐ Difficult   ☐ Neutral   ☐ Easy   ☐ Very easy

On the next page we're going to ask you some questions about authenticating your identity online with an IRS assistor. If you didn't attempt to verify using this method, please skip to the next section- see instructions prior to question 11.



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## Online Verification

**5. Were you able to successfully verify your identity online?**

- ☐ Yes, had existing account   ☐ Yes, able to create account   ☐ No, unable to create account - skip to question 7

**6. How satisfied were you with the process of verifying your identity online?**

- ☐ Very dissatisfied   ☐ Dissatisfied   ☐ Neutral   ☐ Satisfied   ☐ Very Satisfied

**7. Why did your online verification attempt(s) fail? (select all that apply).**

- ☐ Unable to upload or problems with upload tool  
☐ Poor / no Internet connection  
☐ Didn't have correct information or documentation  
☐ I passed  
☐ Wasn't given the option to authenticate online  
☐ Couldn't complete video chat  
☐ Don't know

**8. How many attempts were required to complete the identity verification process?**

- ☐ 1 attempt   ☐ 2 attempts   ☐ 3 or more attempts

Once you completed your identity verification, you should have been redirected back to [irs.gov](https://irs.gov) to verify your tax return

**9. Were you able to validate your tax return information?**

- ☐ I didn't know about the website / process  
☐ I didn't want to  
☐ I was confused by / unable to answer the questions  
☐ I answered something incorrectly  
☐ Other (explain below)

**10. What message did you receive once you answered the questions about your tax return?**

- ☐ Successful  
☐ Fraudulent Return Filed  
☐ Need more information. Call the Taxpayer Protection Program  
☐ Need more information. Make an in-person appointment at a Taxpayer Assistance Center  
☐ Wasn't eligible to use the tool  
☐ Don't remember



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Now we're going to ask you some questions about authenticating your identity over the phone with an IRS assistor. If you didn't attempt to verify using this method, please skip to the next section- see instructions prior to question 15.

### Telephone Verification

11. How satisfied were you with the process of verifying your identity over the telephone with an IRS assistor?

- ☐ Very dissatisfied   ☐ Dissatisfied   ☐ Neutral   ☐ Satisfied   ☐ Very satisfied

12. If you had to wait to speak to an IRS assistor, how many minutes was your wait?

- ☐ Up to 15   ☐ 16 - 30   ☐ 31 - 45   ☐ 45 or more   ☐ No wait, accepted callback   ☐ Disconnected

13. How many dial-in attempts did you make before you reached a live assistor?

- ☐ 1   ☐ 2   ☐ 3 - 5   ☐ 6 - 10   ☐ More than 10

14. How would you describe the IRS assistor's understanding of the verification process?

- ☐ Very poor   ☐ Poor   ☐ Neutral   ☐ Good   ☐ Very good

Now we're going to ask you some questions about authenticating your identity at a Taxpayer Assistance Center. If you didn't attempt to verify using this method, please skip to the next section - please see instructions prior to question 19.

### VERIFYING YOUR IDENTITY AT A TAXPAYER ASSISTANCE CENTER

15. How satisfied were you with the process of resolving the issue in person at a Taxpayer Assistance Center (TAC)?

- ☐ Very dissatisfied   ☐ Dissatisfied   ☐ Neutral   ☐ Satisfied   ☐ Very satisfied

16. Once you received a TAC appointment, How many days out was appointment scheduled?

- ☐ 1 - 15   ☐ 16 - 30   ☐ 31 - 45   ☐ 46 or more

17. How knowledgeable was the TAC employee about the verification process?

- ☐ Very unknowledgeable  
☐ Somewhat unknowledgeable  
☐ Neutral  
☐ Somewhat knowledgeable  
☐ Very knowledgeable

18. How many total minutes did it take to complete the process when visiting a Taxpayer Assistance Center (TAC)?

- ☐ 1 - 15   ☐ 16 - 30   ☐ 31 - 45   ☐ 46 or more

Finally, we're going to ask you some questions about authenticating your identity by mailing documents to the IRS . If you didn't attempt to authenticate using this method, please skip to question 23.

### VERIFICATION BY MAIL

19. How satisfied were you with completing the process of verifying your identity by mailing documents to the IRS?

- ☐ Very Dissatisfied   ☐ Dissatisfied   ☐ Neutral   ☐ Satisfied   ☐ very Satisfied



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20. From the time you mailed in the documents to the IRS to verify your identity, how many days was it until you received your refund?

- ☐ 1 - 30   ☐ 31 - 45   ☐ 46 - 60   ☐ 61 or more

21. Did you send in the necessary documents on your first attempt to verify your identity?

- ☐ Yes (skip to question 24)   ☐ No

22. If "no", what caused the initial failure of the verification?

- ☐ I didn't have the necessary documents  
☐ I wasn't comfortable sending documents through the mail  
☐ IRS couldn't verify authenticity of one or more of the documents  
☐ No IRS response  
☐ Other (please specify below)

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#### VERIFICATION PROCESS OVERALL

23. Based on your experience, how do you think the IRS can improve the process of identity theft verification? Select all that apply.

- ☐ Notices could provide clearer instructions  
☐ The IRS could accept more types of documentation to verify identity  
☐ The verification options (online, phone, in person or via mail) could be improved  
☐ Allow more attempts online  
☐ Shorter wait time to reach a phone assistor  
☐ Shorter wait time for a TAC appointment  
☐ N/A - process works well  
☐ Other (please specify below)

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This completes our survey; however, we are required by law to report to you the OMB control number for this public information request. That number is 1545-1432. If you have any comments about the time estimate for completing this survey or about ways to improve the survey, please write to the Internal Revenue Service, Special Services Section, SE:W:CAR:MP:T:M:S, 1111 Constitution Ave. N.W. Washington DC 22024.

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