

## Navigating IRS Interactions: Essential Tips for Secure and Smooth Communication

OCTOBER 3, 2024 | BY: THE LEADERSHIP TEAM



Interacting with the IRS can seem daunting, but there are key practices that taxpayers can follow to ensure their interactions are safe and smooth:

**Let Us Know:** First and foremost, if the IRS contacts you, let your advisor at Johnson O'Connor know. The IRS has a number of services that allow tax professionals to interact with the IRS directly on behalf of a client, which can save you the time and hassle of attempting to do so yourself and ensure you're receiving qualified advice for any complex tax issues.

**Official Channels:** If you do have direct contact with the IRS, ensure it is through official IRS channels. The IRS primarily communicates through mail, so be very wary of unsolicited emails, calls, or texts claiming to be from the IRS. Unfortunately, a number of scam artists have learned to create written documents that look alarmingly like legitimate IRS or state tax correspondence. If you receive something that purports to be from the IRS or a state tax agency, share it with your advisor to be sure it's legitimate.

**Protect Personal Information:** Never share sensitive information like Social Security numbers, bank account details, or passwords over email or social media. If you must provide them online, be certain that you are working through a trusted and protected site. Be suspicious of anyone who reaches out to you to request your SSN, whether through email, social media, or phone.

**Set Up an Online Account:** The IRS now allows individual taxpayers to set up an online account. With an online account, you can view information on your most recently filed return, check the status of a refund, view digital copies of IRS notices, view your payment history, and schedule or cancel pending and future payments. [More information on the registration process can be found here.](#)

**Understand Your Payment Options:** The IRS offers various payment methods, including easy and free online payment portals directly on IRS.gov. Be cautious of third-party payment processors that charge fees for services the IRS provides for free. Given the possibility of stolen checks and related fraudulent activity, we advise taxpayers to make electronic payments to the IRS whenever possible. If you must mail a check, do so very cautiously and ensure that you send it via certified mail, registered mail, or a reputable courier such as UPS or FedEx. Not only does this increase the likelihood that your payment arrives at its destination, but it provides you with proof of when the payment was mailed. Always make checks payable to "United States Treasury" and include a payment voucher (such as a 1040-V for tax payments) along with your check. Ensure your social security number is included on the check, and keep a copy of the check you sent and the payment voucher.

**Consider Obtaining an Identity Protection PIN (IP PIN):** The IP PIN is a six-digit number assigned to taxpayers. It helps the IRS verify a taxpayer's identity and helps prevent identity thieves from filing fraudulent tax returns using the taxpayer's Social Security number. Starting in 2024, the IRS expanded the IP PIN program to allow taxpayers to opt-in voluntarily, provided they can verify their identities through the IRS Secure Access portal. Once you receive an IP PIN, you must include it on your federal tax return each year (Forms 1040, 1040-SR) to verify your identity and prevent processing delays. Each year, the IRS mails a new IP PIN to eligible taxpayers who are automatically enrolled or have opted-in to the program. [If you would like to opt-in to this program, you can do so here.](#) If you do obtain an IP PIN, you must share it with your tax return preparer in order to e-file your tax return successfully.

As you navigate your interactions with the IRS, following these guidelines can help ensure a secure and smooth experience. If you have any questions or need assistance, please do not hesitate to contact your advisor at Johnson O'Connor. Our team is here to support you with expert guidance and help you manage any complex tax issues effectively.

### **RELATED SERVICES**

Business & Nonprofit Tax

Individuals, Trusts & Estates Tax

State & Local Tax

### **RELATED INDUSTRIES**

Owner Managed Businesses

Professional Services