

Individual Identity Verification

Screenshots from the online system | Updated March 5, 2021

Select "CPEO" from Organization dropdown

Main Menu
Choose from the options below for the function you wish to perform.

Start or Resume an Application
Which application would you like to complete?

<Choose Organization Type> ▼
<Choose Organization Type>
501(c)(4)
CPEO

Additional Activities
Secure Mailbox

My Information
No License Information Available

[Having technical issues? Access the CPEO FAQs or 501\(c\)\(4\) FAQs.](#)

Select "Individual Identity Verification" from the Application dropdown.

Main Menu
Choose from the options below for the function you wish to perform.

Start or Resume an Application
Which application would you like to complete?

CPEO ▼

Individual Identity Verification ▼
<Choose Application>
Create a Controlled Group
Individual Identity Verification
PEO Certification
Secure Mailbox

My Information
No License Information Available

[Having technical issues? Access the CPEO FAQs or 501\(c\)\(4\) FAQs.](#)

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Screen which displays if a user has previously started an Individual Identity Verification on this account. If the user has not previously begun this type of application, this screen will not display.

The screenshot shows the IRS logo in the top left and the user's login information in the top right: "Logged in as Stark, Tony" with links for "Edit Login Information" and "Logoff". The main content area is titled "You Have an Incomplete Application: Individual Identity Verification". Below the title, it asks "What do you want to do?" and provides two options: "Start a New Application (Please note this will overwrite any existing application.)" and "Resume Working on the Incomplete Application". Each option has a blue "Select" button. At the bottom left, there is a "Secure Mailbox" link with a "Select" button. At the bottom center, there is a footer: "Having technical issues? Contact the Helpdesk at 855-IRS-REGS (855-477-7347)."

Gather Your Information screen

The screenshot shows the "Gather Your Information" screen. On the left is a navigation menu with "Gather Your Information" selected, and other options: "Pre-screening", "Basic Information", "Tax Address", "Tax Filing Details", and "Review Your Information". The main content area is titled "Individual Identity Verification - Gather Your Information". It includes a "Before You Begin:" section with a warning that the Internal Revenue Service must verify identity before submission. Below this is a paragraph explaining the requirements for identity verification. A link is provided to view the "CPEO Privacy Act and Paperwork Reduction Act Notice here". A "Helpful Information for Navigating the System:" section lists five buttons: "Previous", "Next", "Return to Main Menu", "Add", and "Delete", each with a brief description of its function. At the bottom right, the OMB No. 1545-2266 is displayed. At the bottom center, there are two buttons: "Next" and "Return to Main Menu". At the bottom of the page, there is a footer: "Having technical issues? Access the CPEO FAQs or 501(c)(4) FAQs."

Individual Identity Verification

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Pre-screening Questions screen

Gather Your Information

Pre-screening

Basic Information

Tax Address

Tax Filing Details

Review Your Information

Individual Identity Verification - Pre-screening

Individual Identity Verification is available for those who have filed a U.S. Individual Income Tax return in the past six years.

Question	Answer
Do you have a Social Security Number?	<input type="radio"/> Yes <input type="radio"/> No
Are you 18 years of age or older?	<input type="radio"/> Yes <input type="radio"/> No
Have you filed a U.S. individual income Tax Return in the last six (6) years?	<input type="radio"/> Yes <input type="radio"/> No

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Having technical issues? Access the [CPEO FAQs](#) or [501\(c\)\(4\) FAQs](#).

Basic Information screen

Gather Your Information

Pre-screening

Basic Information

Tax Address

Tax Filing Details

Review Your Information

Individual Identity Verification - Tax Address

- Enter the address shown on your most recently filed U.S. individual income tax return
- Do not include punctuation even if it was shown on your previous year's return.
- Be extremely careful inputting this information, as a single digit error may result in a failure to verify your identity.

Tax Address

* Address Line 1

Address Line 2

Address Line 3

* Zip Code:

* City:

* State:

* Country:

* Phone Number:

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Having technical issues? Access the [CPEO FAQs](#) or [501\(c\)\(4\) FAQs](#).

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Tax Address screen

Gather Your Information

Pre-screening

Basic Information

Tax Address

Tax Filing Details

Review Your Information

Individual Identity Verification - Tax Filing Details

Enter your most recently filed U.S. individual income tax return information below.

Tax Filing Details

* Tax Year:

* Filing Status:

[Previous](#) [Next](#) [Return to Main Menu](#)

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Having technical issues? Access the [CPEO FAQs](#) or [501\(c\)\(4\) FAQs](#).

Tax Filing Details screen

Gather Your Information

Pre-screening

Basic Information

Tax Address

Tax Filing Details

Review Your Information

Individual Identity Verification - Tax Filing Details

Enter your most recently filed U.S. individual income tax return information below.

Tax Filing Details

* Tax Year:

* Filing Status:

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Individual Identity Verification

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Review Your Information screen

(users may click the Edit button to jump to the screen to edit the information in that section)

Gather Your Information

Pre-screening

Basic Information

Tax Address

Tax Filing Details

Review Your Information

Individual Identity Verification - Review your Information

You're almost finished. Carefully review your information below. If it is correct, select "Submit".

Application	License Type: ID-Proofed Application Date: 03/08/2021	
Personal Information	Full Name: John Smith SSN: ***** Birthdate: **/**/****	Edit
General Addresses	Tax Address 123 Main St. Arlington, Virginia 22201 US Phone Number: 123-123-1234	Edit
Tax Filing Details	Tax Year: 2020 Filing Status: Single	Edit

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Previous **Submit** **Return to Main Menu**

Having technical issues? Access the [CPEO FAQs](#) or [501\(c\)\(4\) FAQs](#).

Clicking "Submit" on the Review Your Information screen brings the user to the Jurat page

Jurat screen

Gather Your Information

Pre-screening

Basic Information

Tax Address

Tax Filing Details

Review Your Information

Individual Identity Verification - Attestation


Review and agree to the statement below before submitting your form.

Under penalties of perjury, I declare that I have examined this Individual Identity Verification form and to the best of my knowledge and belief, it is true, correct, and complete. I understand any false or misleading information may result in criminal penalties and denial of certification.

[Previous](#) [Submit](#) [Return to Main Menu](#)

Having technical issues? Access the [CPEO FAQs](#) or [501\(c\)\(4\) FAQs](#).

Screen that displays when the information in the Individual Identity Verification does not match IRS records



Logged in as **Stark, Tony**
[Edit Login Information](#) | [Logoff](#)


Action Required: Fix Errors on this Submission

Errors were found with this Individual Identity Verification. Press "Fix" to go through the application and fix the errors. You may also click "View PDF Summary Report" to download a copy of this submission (including the errors) for your records.
Press "Fix" to go through the application and fix the deficiencies.

Deficiencies

1. Applicant must be over 18 years of age

[Fix](#) [View PDF Summary Report](#)



OMB No. 1545-2266

Individual Identity Verification

Screenshots from the online system | Updated March 5, 2021


Screen that displays when the Individual Identity Verification matches IRS records and ID-proofing is complete

Download Your Summary Report

Your Individual Identity Verification has been successfully submitted. You must click "View PDF Summary Report" to print or save a copy of this report for your records. You will not be able to print or save a copy of this submission at a later date.

This is your only opportunity to save a copy of this form.

OMB No. 1545-2268

[Return](#) [View PDF Summary Report](#) 

Having technical issues? Access the [CPEO FAQs](#) or [501\(c\)\(4\) FAQs](#).

Upon returning to the Main Menu, the user will see individual license information is now visible in the My Information box.

Main Menu

Choose from the options below for the function you wish to perform.

Manage your license information

ID-Proofed #INDV-121569 Responsible Individual Personal Attestation [Select](#)

Start or Resume an Application

Which application would you like to complete?

<Choose Organization Type>

<Choose Application> [Select](#)

Additional Activities

Secure Mailbox [Select](#)

My Information

Name: John Smith
License Number: #INDV-121569
Rank: ID-Proofed

Having technical issues? Access the [CPEO FAQs](#) or [501\(c\)\(4\) FAQs](#).