

# 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.](#)

## Individual Identity Verification

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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 has a heading "You Have an Incomplete Application: Individual Identity Verification" with an information icon. Below the heading is the question "What do you want to do?". There are three options, each with a "Select" button: "Start a New Application (Please note this will overwrite any existing application.)", "Resume Working on the Incomplete Application", and "Secure Mailbox". At the bottom of the page, there is a footer with the text: "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 has the heading "Individual Identity Verification - Gather Your Information". Below the heading is the section "Before You Begin:" with a paragraph explaining that the Internal Revenue Service must verify the user's identity before submitting an application to be a certified professional employer organization (CPEO) or a Responsible Individual Personal Attestation form. It also states that in order to have identity verified online, the user needs their most recently filed individual income tax return and other personal information. A link is provided to view the "CPEO Privacy Act and Paperwork Reduction Act Notice here". Below this is the section "Helpful Information for Navigating the System:" with a bulleted list of button functions: "Previous", "Next", "Return to Main Menu", "Add", and "Delete". At the bottom right, there is the text "OMB No. 1545-2266". At the bottom of the page, there are two buttons: "Next" and "Return to Main Menu". A footer at the very bottom says: "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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[Previous](#) [Next](#) [Return to Main Menu](#)

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](#).

# Individual Identity Verification

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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".

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

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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

# Individual Identity Verification

Screenshots from the online system | Updated March 5, 2021

## 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

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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](#).