

Five Things You Should Know About Calling the IRS

If you have tax troubles or questions, one potential help source is calling the Internal Revenue Service's helpline. They can assist you if you have questions about your tax return, need to arrange a payment plan for taxes you owe, or have various other issues. However, if you decide to call the IRS, there are a few things you should know beforehand:

Do Not Call Looking For Help With Your Return

This may sound obvious, but the IRS is not your tax preparer, a tax attorney, or an accountant. They cannot directly assist you with your return, and if you call asking for help, you will likely waste their time and yours. That is why you should speak to your accountant, lawyer, or tax preparer first or check the IRS website to see if they have already answered your questions.

Have Your Identifying Information Ready

When you call the IRS, you will need to be able to identify yourself or the person you are calling on behalf of. This means you will need your name, date of birth, Social Security number, a completed tax return, an EIN or Tax Payer Identification Number, and proof of past payments if you have a payment plan with the IRS. If you call on behalf of someone else, you should have their power of attorney available to prove you can speak on their behalf.

Know Why You Are Calling

To make your call with the IRS as efficient as possible, ensure you are clear about what matter you are calling about. This means you should have relevant documentation and be clear about what kind of help you need. That way, your call will go as quickly as possible, and your chances of having your matter handled expeditiously will increase.

Expect Significant Wait Times

Although the IRS recently received additional funding for its helpline, it is still swamped, especially as tax season approaches. Thus, if you need to call the IRS, expect significant wait times before your call goes through. This means you should set aside a decent amount of time for your call and be ready to wait until you connect with someone on the line.

Beware Anyone Who Calls You Claiming to Be From the IRS

That being said, while it is perfectly normal for regular people to call the IRS, it is unheard of for the IRS to call people. The IRS may email you, but never unsolicited. If you receive an unsolicited call, text, or email from someone claiming to be an IRS agent, report it to the agency so they can investigate it.

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