

Helping Clients Navigate ID.me



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Agenda

2026 pilot

Challenges and workarounds

Lessons Learned

Future plans

2026 pilot

- Small pilot, met with 10 clients at 2 locations
- Separate from tax prep appointment
- Most needed to retrieve an **IP PIN**
- Other needs: Check status of previous year refund; ID verification; Adding bank account information for refund; Accessing transcripts; Accessing SSA account
- Worked with clients for 12 hours, that's 12 hours that tax preparers and site managers could focus on tax returns and managing sites!

Challenges and workarounds

- Client's email was full and couldn't receive verification code
- Showed clients how to delete emails (focus on bulk-deleting ads and social media notifications) until they can receive the verification code, suggested they ask a trusted friend or family member to show them how to unsubscribe from email notifications.

Challenges and workarounds

- Clients who had tried to set up ID.me on their own had trouble with the authenticator app, or had constant notifications from the app and deleted it.
- Changed the authentication method to text. It's much easier to use and a more familiar process.
- If the client's phone number had changed, the client had to re-download the authenticator app, use that to access the account, then update their phone number and change the authentication method to text.

Challenges and workarounds

- After uploading docs, ID.me says they will review docs (2-3 days) and email when they're ready for a phone call
- Scheduled a follow-up appointment 3+ days later.
- Some got an additional email saying it will be another 2-3 days, so we rescheduled.

Lessons learned

- Created a form to write down information like email, phone number, password, and address, which often had to be entered multiple times throughout the process
 - Also created an opportunity to ask, do you have access to this email, is it full, and is your current address the one on your ID?
 - The client gets to keep this form after the appointment for their own records

Lessons learned

- Recommend always starting from the IRS page when creating an account (vs. starting on theID.me web site)
- Recommend using text authentication (vs. authenticator app)
- During the phone call portion, when the representative asks if someone told the client to set up ID.me, the answer is a confident **no** - this question is designed to identify fraud.

Future plans

FC will be seeking more volunteers to offer more appointments, ideal volunteer is flexible on location, bilingual and can volunteer without reducing their tax prep commitment. We will look to tax preparers who are also financial coaches.

ID.me is also making updates. The way you provide photos of your ID is now integrated into the ID.me page, rather than having to take a picture with your camera app, then uploading the picture.

The background is a solid teal color. In the lower-left quadrant, there are several overlapping, semi-transparent shapes in varying shades of teal and dark teal, creating a layered, abstract effect. The word "Questions?" is centered horizontally and vertically in a bold, sans-serif font.

Questions?

Thank You

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