Agenda

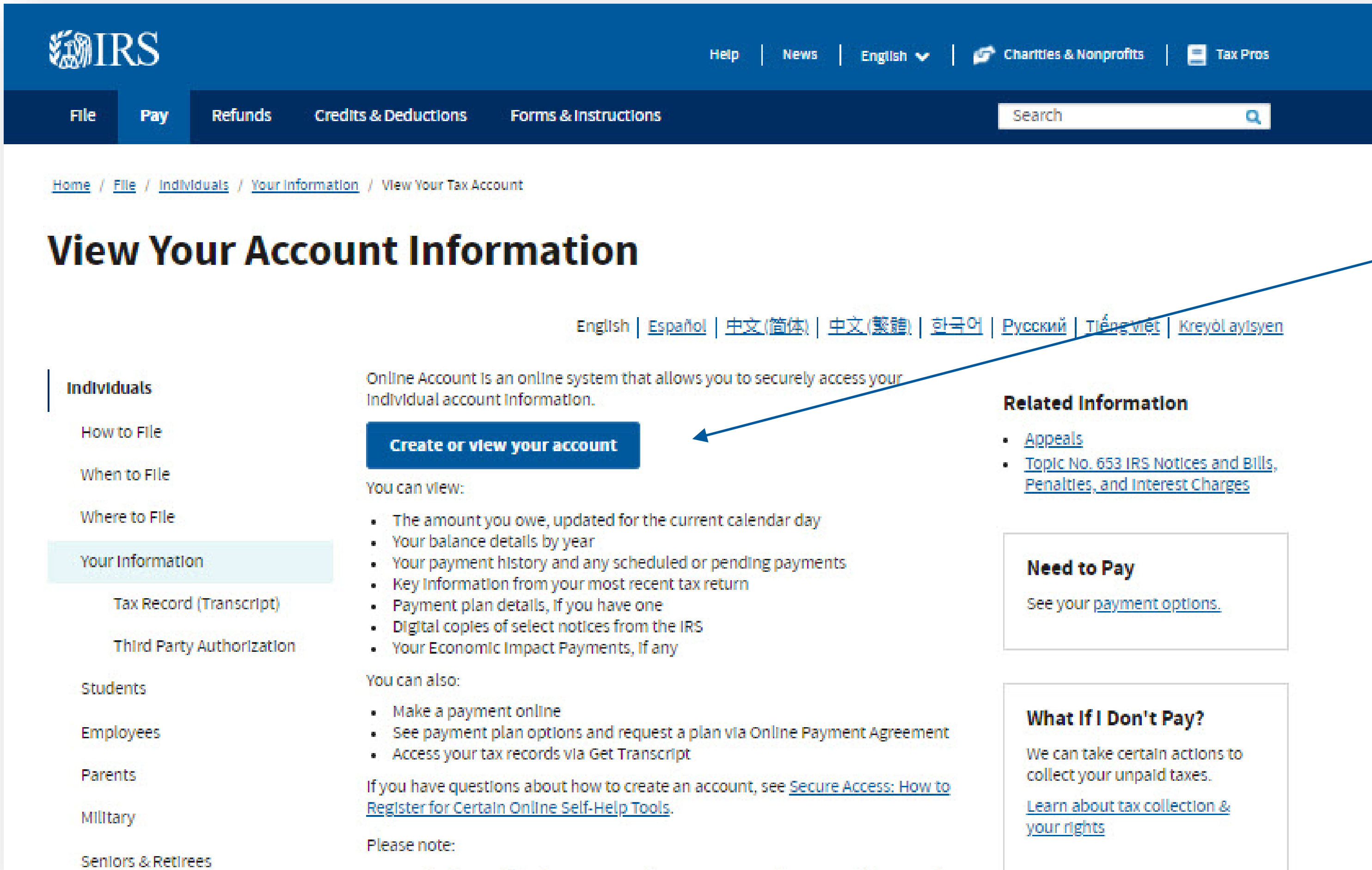
- Online Account Demo Screenshots
- Tax Pro Account Demo Screenshots

Office of Online Services

Online Account

A self-service tool for individual taxpayers to view their account information

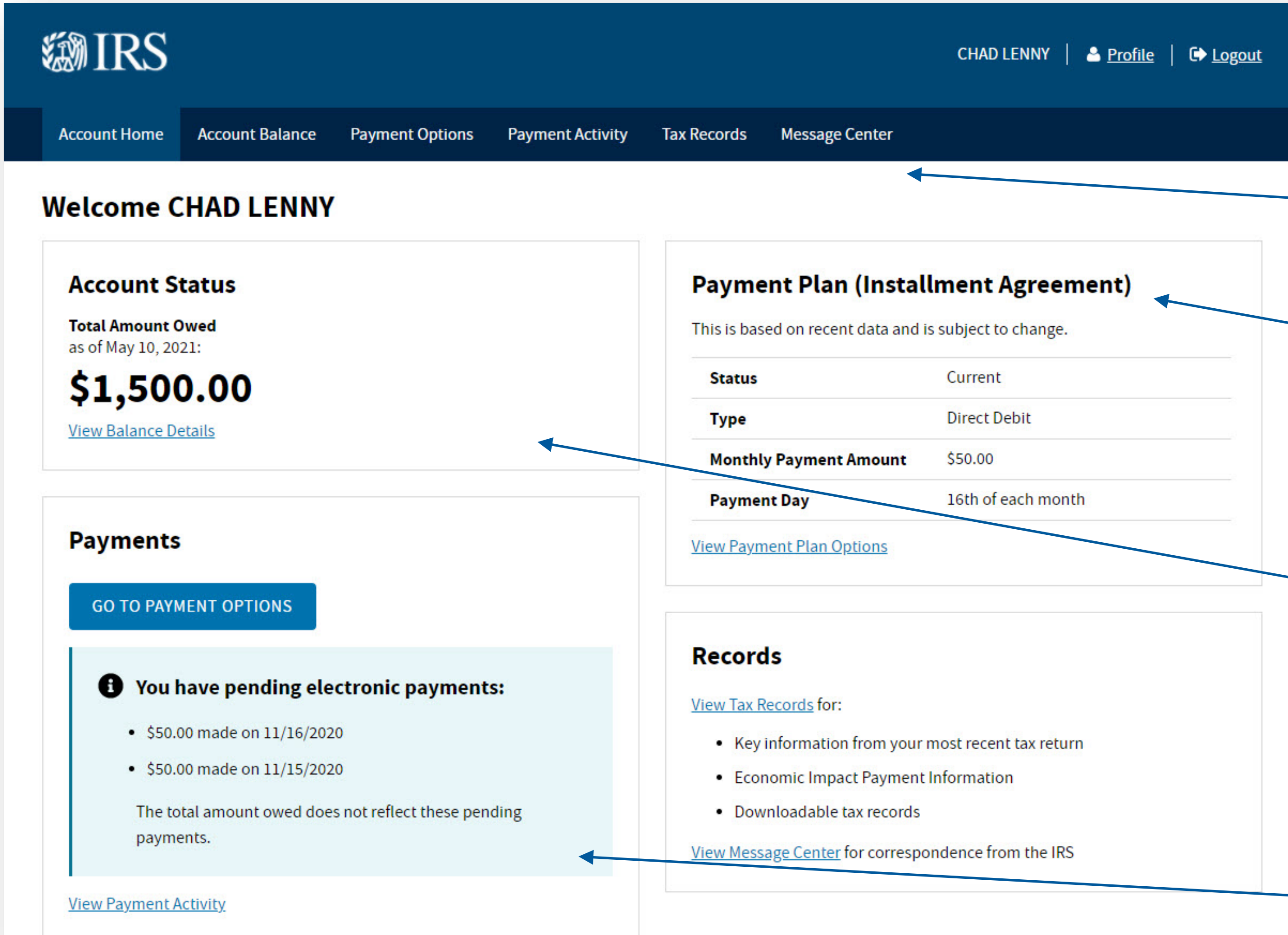
Online Account landing page on IRS.gov takes you to the login



Login

This button takes you to Secure Access, where users can log in or create an account.

Account Home shows key data about the taxpayer's account



Tabbed View

Users can navigate to different features using the tabs shown or the links on the page.

Payment Plan Details

Taxpayers who have a payment plan can see the details of their plan.

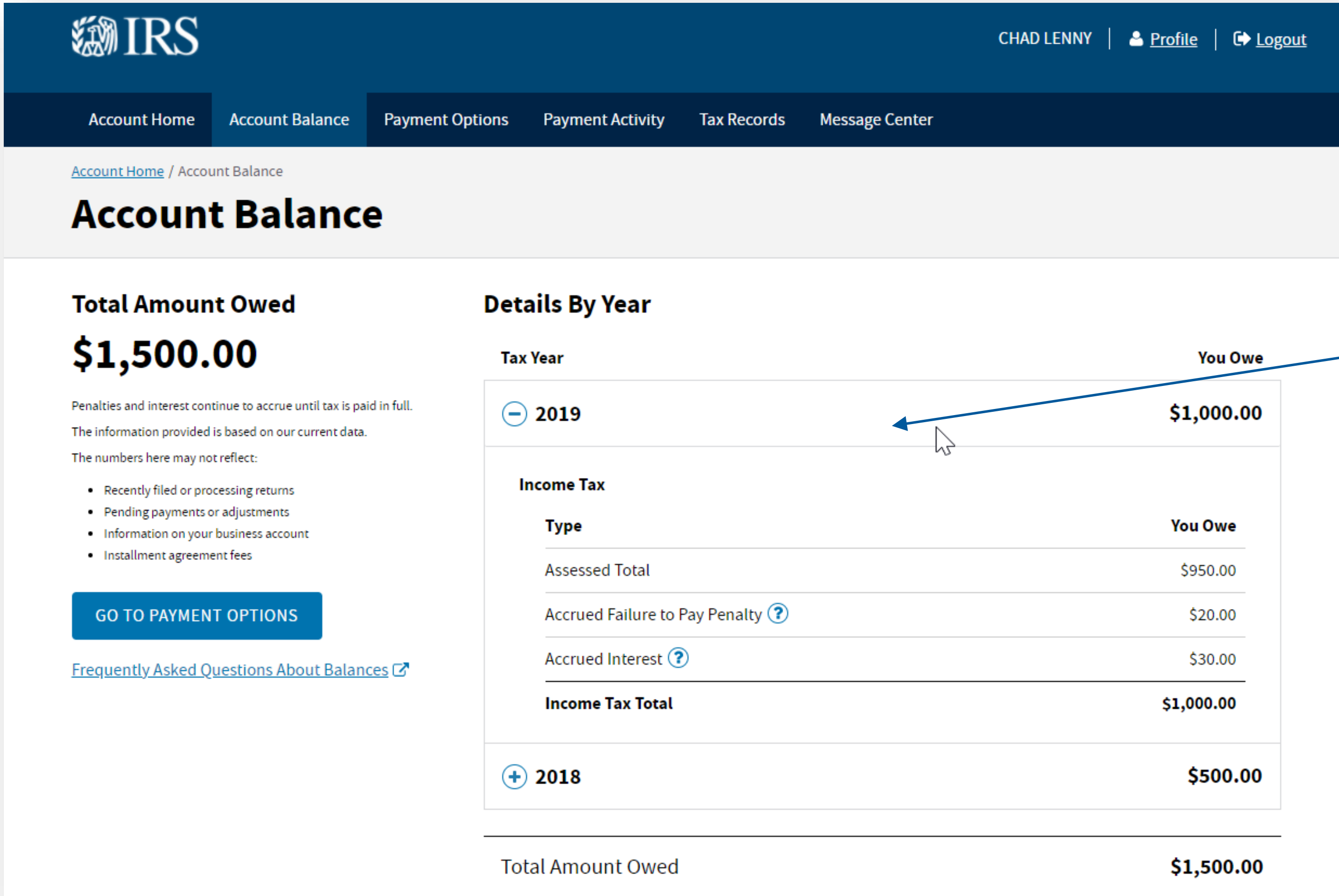
Balance Due

The home page shows the total amount owed as of the day you log in.

Pending Payments

Any pending payments appear on the home page.

Account Balance breaks down any balance owed by tax year and type

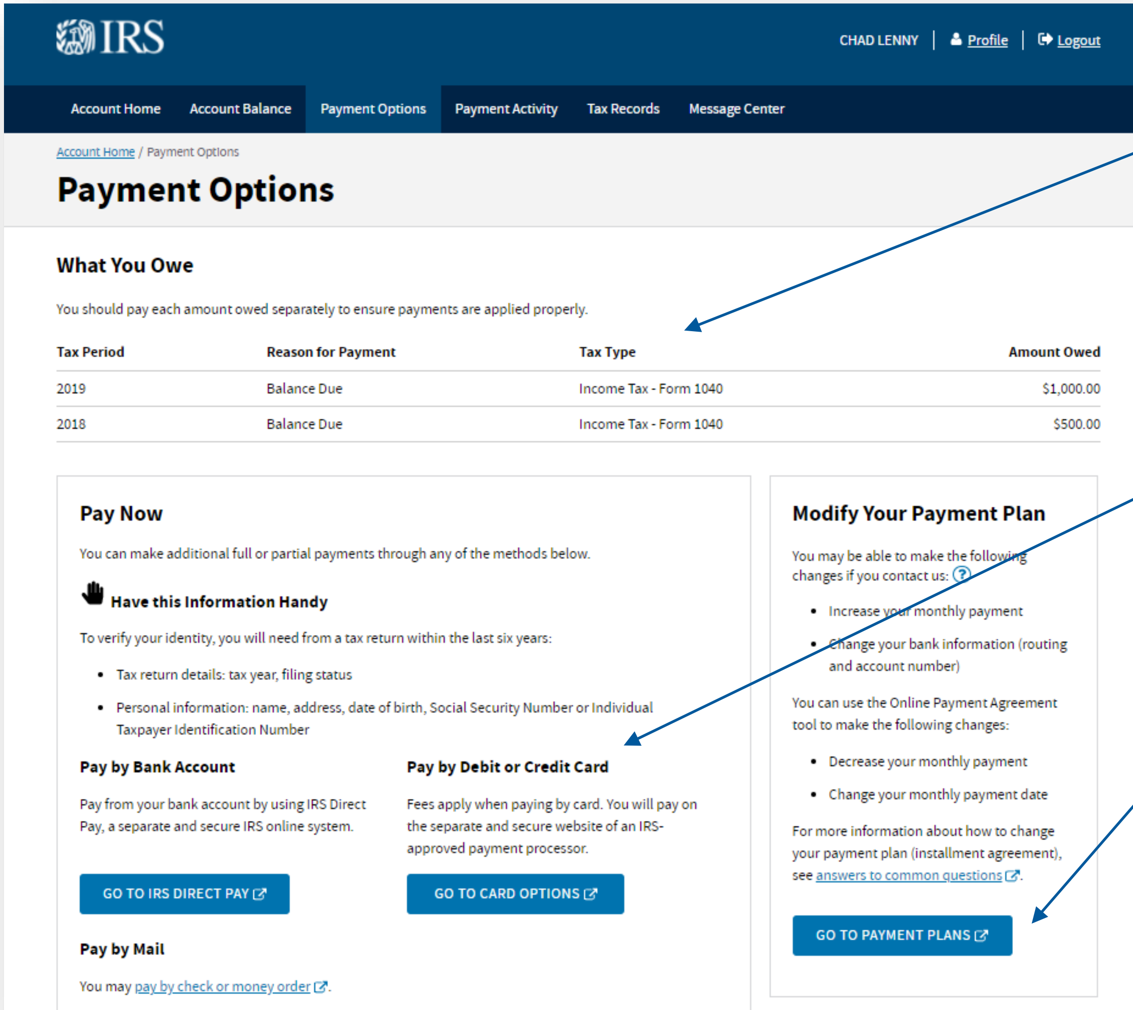


Amount Owed by Year

Taxpayers can see a breakdown by year for any years with a balance including penalties and interest. This includes:

- Income Tax
- Civil Penalties
- Form 5329
- Shared Responsibility Payments
- Separate Assessments

Payment Options outlines amounts owed and payment methods available



Summary of What's Owed

High-level information for taxpayers to assist them with making payments

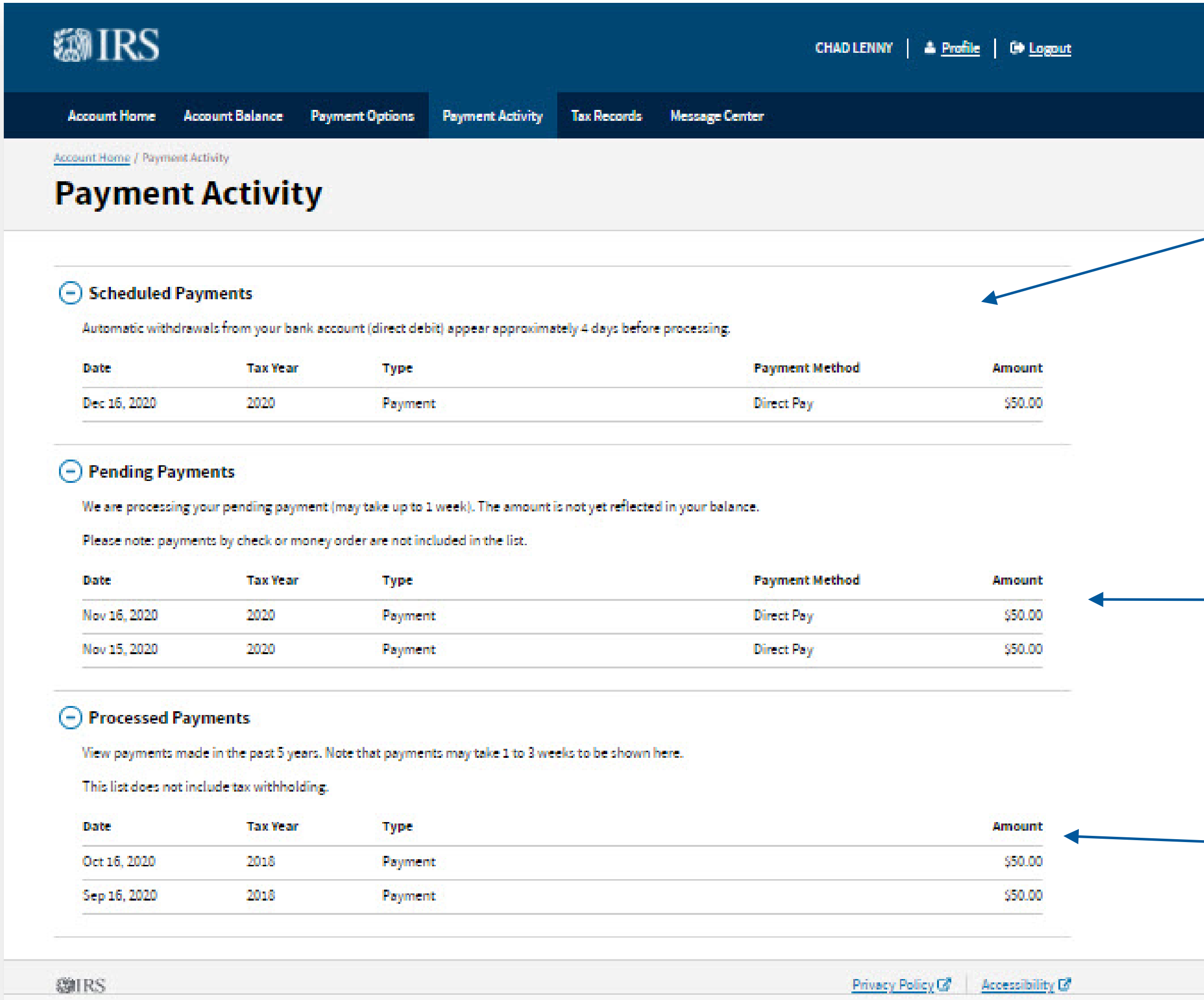
Clarifying Content

Messaging that highlights different ways to pay

Clear Calls to Action

Takes taxpayer directly to the payment tools to make a payment and set up or modify payment plans

Payment Activity displays past and scheduled transactions



Scheduled Payments

Shows any payments that have been scheduled for future dates, including:

- Payments made through tax software, and
- Direct Debit Installment Agreement payments (appear 4 days before the payment date).

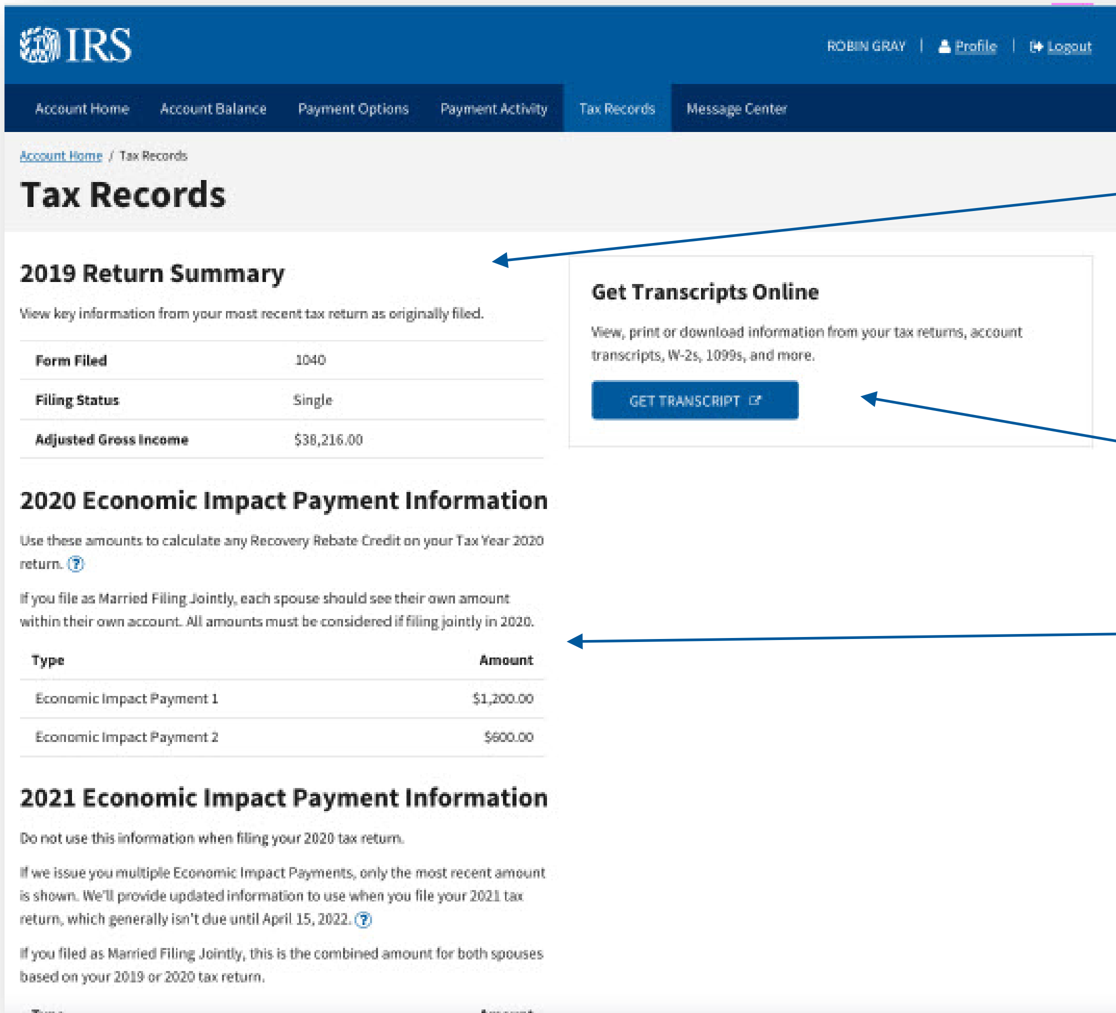
Pending Payments

Shows any payments that are in process and have not yet been applied to your balance.

Processed Payments

Shows all payments made for the past 5 years, including the type of payment (e.g., estimated tax).

Tax Records provides important data for tax returns



Key Data from Most Recent Tax Return

Clearly highlights key information for taxpayers from their most recent return

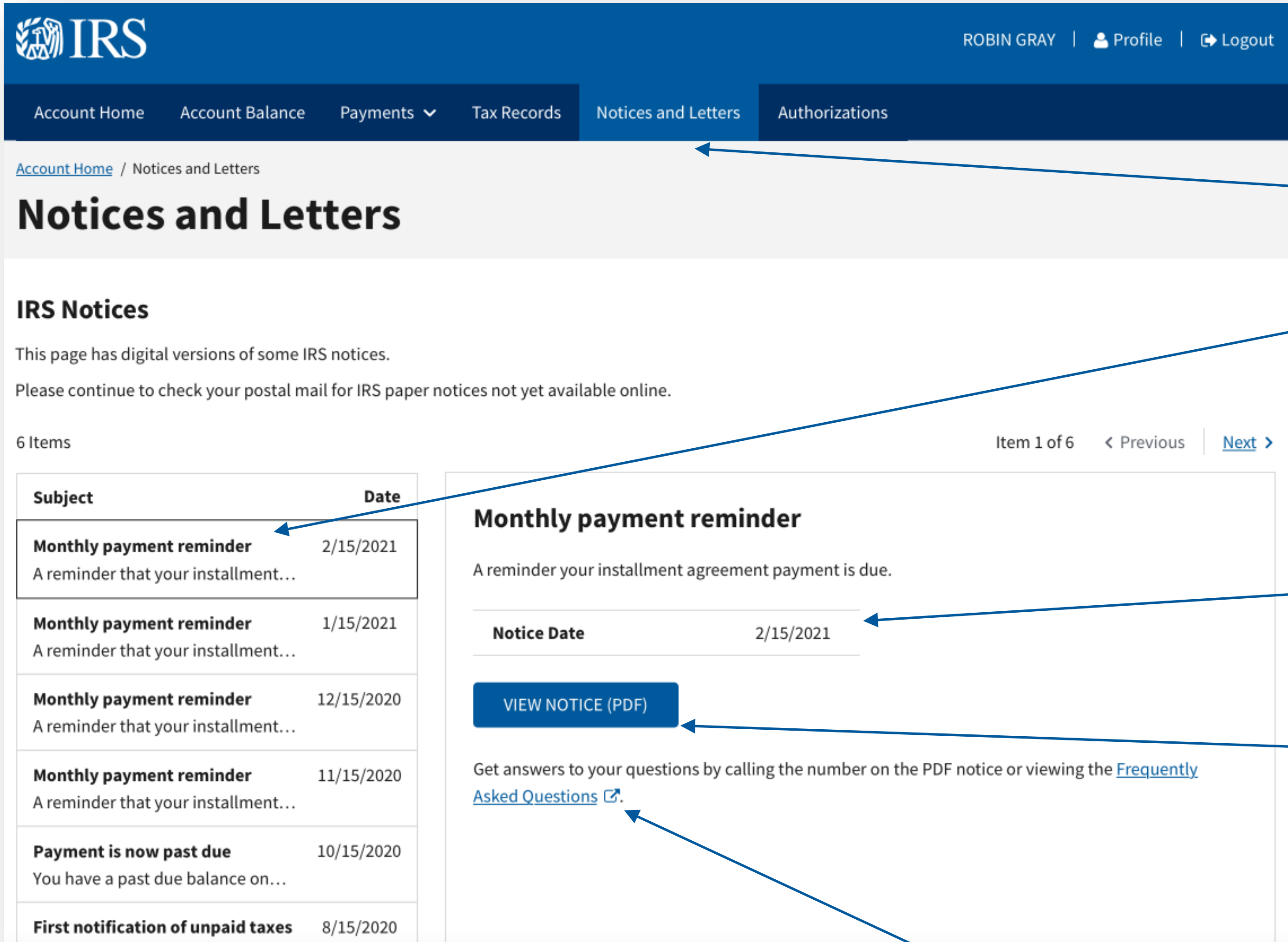
Get Transcripts

Provides access to account and return transcripts online

Economic Impact Payment Info

Tax Records now shows Economic Impact Payment amounts for qualifying taxpayers

Notices and Letters centralizes taxpayer communications



Updated Tab Label

Label change from "Message Center" to meet taxpayer expectations

List of Notices

Provides Taxpayers with PDF versions of any new notices

Notice Details

Includes name, date issued, and short description

View Notices

Click the button to view or download notices as a PDF

Additional Support

Includes links to Frequently Asked Questions below core content

Profile displays key taxpayer contact information

IRS

FIRSTNAME LASTNAME | Profile | Logout

Account Home | Account Balance | Payment Options | Payment Activity | Tax Records | Message Center

Account Home / Your Profile

Your Profile

Full Name	FIRSTNAME LASTNAME	
Mailing Address	14th Street NW Baltimore, MD 21201 United States	
Email Address	taxpayer@email.com	EDIT

How to Change Your Profile Information

Your Name

Name changes must be made through the Social Security Administration. For more information, see name changes.

Your Mailing Address

To change your mailing address, you can submit Form 8822 (PDF) by mail or get more information on address changes.

Your Email and Password

To change your email address, password, and other account details, go to your online user profile.

Prioritize Profile Visibility

Navigate here to open profile page within Online Account

Additional features will be added to Online Account this year

Tax Pro Authorizations

Approve and electronically sign Power of Attorney and Tax Information Authorization requests from your tax professional

Opt-out of Paper Notices

Go paperless for certain correspondence from the IRS.

Manage Notification Preferences

Request email notifications for digital notices or payments.

Create a Short Term Payment Plan

Setup short term payment plans within online account.

Make a Payment

Pay your balance or estimated taxes seamlessly within Online Account.

Office of Online Services

Tax Pro Account

Tax Pro Account: Methods to Submit POAs and TIAs

Individuals have various options when submitting Power of Attorneys (POAs) and Tax Information Authorizations (TIA) to the IRS.

Mail*

Paper submission, paper processing.

Characteristics:

- Physical receipt of forms through mail
- Sorting and review process up to 15 days**
- Paper stored in IRS files until shredded

Fax*

Electronic submission via fax, electronic processing.

Characteristics:

- Electronic receipt of form images
- Review and Centralized Authorization File (CAF) entry up to 15 days**
- Online storage and records management

Deployed January 2021

Taxpayer Digital Communications (TDC)*

Electronic submission of Forms 2848/8821 via TDC, electronic processing.

Characteristics:

- Secure Access account required for submission
- Authorized third-party access to platform
- Image of electronic signature
- Review and CAF entry up to 15 days**
- Online storage and records management

To Deploy July 2021

Tax Pro Account

Electronic submission of online equivalents of Forms 2848/8821 via Tax Pro Account, electronic processing.

Characteristics:

- Dedicated interface for tax professionals integrated with individual taxpayers' Online Account for taxpayer access to approve or reject authorization requests online
- Secure Access via eAuth allows for identify and signature authentication
- CAF integration for real-time processing -- requests are submitted, validated and approved online with no manual intervention
- Electronic capture and storage of tax professional and taxpayer digital signatures using Electronic Signature Storage and Retrieval (ESSAR)
- IAL2/AAL2 compliant using Secure Access LOA-3 (NIST 63-3 compliant by FY2022)

**Forms submitted via Mail, Fax, and TDC are processed in First In, First Out (FIFO) basis.*
***Typical processing timeframe is 5 days; however, timeframe was extended to up to 15 days due to COVID.*

New Taxpayer Options for POA and TIA

Features launching summer 2021:

- IRS adds “authorization” feature to individual Online Accounts.
- IRS launches Tax Pro Account on IRS.gov to allow tax professionals to initiate online third-party authorization requests.
  - Tax professional initiates a POA or TIA, uses checkbox as electronic signature for POAs.
  - POA or TIA requests automatically transfers to individual taxpayer’s Online Account.
  - Taxpayer accesses their Online Account and select “Authorization” tab.
  - Taxpayer uses checkbox as signature and approves request.
  - Upon approval, authorization is automatically submitted to CAF.
- Most requests post immediately to CAF eliminating long waits for review and processing.
- Online Account and Tax Pro Account protected by identity proofing/multi-factor authentication (Secure Access).

Registering for Secure Access

To use the Tax Pro Account, individuals must register for Secure Access.

- Individuals already registered for secure access (e.g., Get Transcripts) can use the Tax Pro Account to initiate POAs and TIAs.
- To register for secure access, you will need:

  - Your email address
  - Your tax filing status, personal information, and mailing address from your most recently filed tax return
  - Your Social Security Number (SSN) or Individual Tax Identification Number (ITIN)
  - One financial account number linked to your name (credit card, student loan, mortgage or home equity loan, home equity line of credit, or auto loan)
  - Your U.S. based cell phone to receive the one-time activation code
    - If you do not have a cell phone, you can opt to receive the activation code through mail

Note: For more information on Secure Access, see IRS.gov/SecureAccess

Secure Access

IRS

Sign Up

Don't have an account? Create one now.

CREATE ACCOUNT >

Log In

Already have a username? Welcome back!

Username

LOG IN >

Forgot Username

PTIN and FIRE users need a separate account in this system

WARNING! By accessing and using this government computer system, you are consenting to system monitoring for law enforcement and other purposes. Unauthorized use of, or access to, this computer system may subject you to criminal prosecution and penalties.

Help | IRS Privacy Policy | Security Code Terms and Conditions | Accessibility

Tax Pro Account: Log In

Notional

Secure Log In

IRS

We sent a security code to your phone

We sent a text message to your phone (ending in 1991). Please enter the code below.

6-digit security code

●●●●●●

Resend Security Code
No longer have access to this phone?

CONTINUE ›

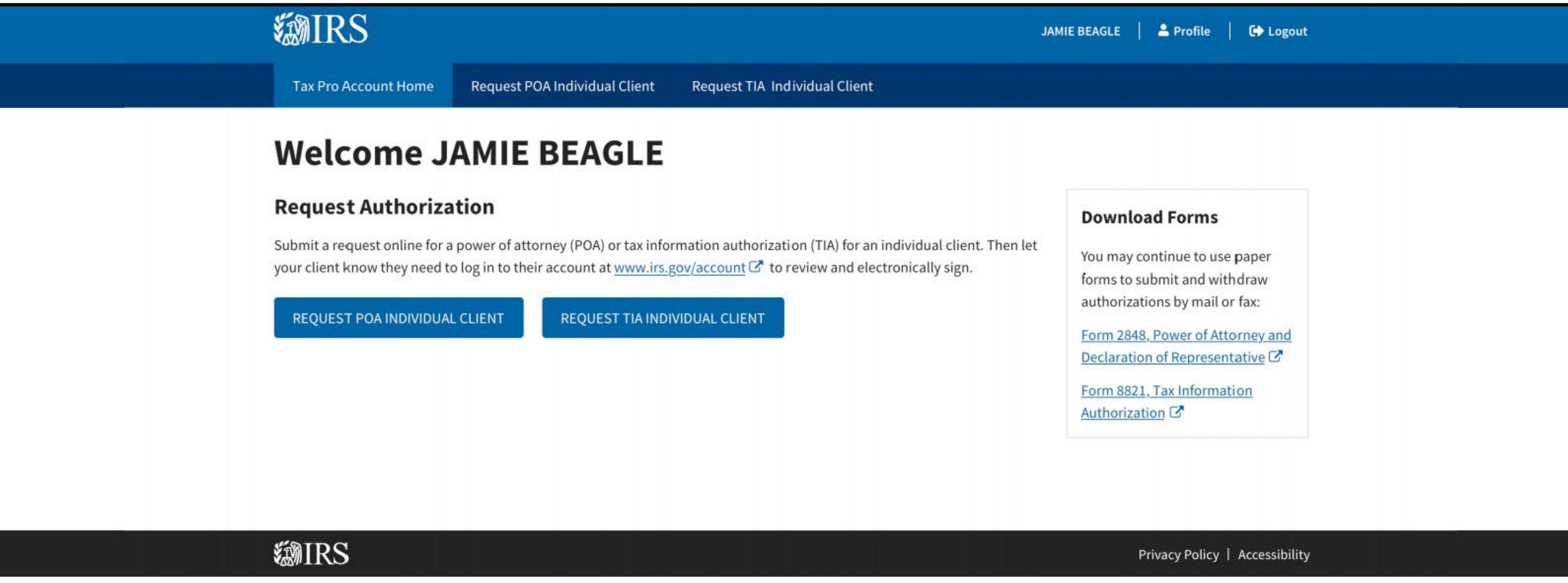
If you can't get a text message right now, you can get a security code via phone call.

Logout

Help | IRS Privacy Policy | Security Code Terms and Conditions | Accessibility

Notional

Tax Pro Account Home Page (Full Screen)



Before You Start Page (Screen 1 of 2)

IRS JAMIE BEAGLE | Profile | Logout

Tax Pro Account Home | Request POA Individual Client | Request TIA Individual Client

Tax Pro Account Home / Request Power of Attorney (POA) Individual Client

Request Power of Attorney (POA) Individual Client

Before You Start

You must have:

- A Centralized Authorization File (CAF) number, which the IRS assigns the first time you mail or fax a third-party authorization
- One of the following credentials and not be suspended or disbarred from practice before the IRS per Circular 230 Tax Professionals
  - Attorney
  - Certified Public Accountant
  - Enrolled Agent
  - Enrolled Actuary
  - Enrolled Retirement Plan Agent

Compare Options to Request POA

Request POA Online

Submit the request online if all the following are true.

- ✔ Individual client
- ✔ One representative
- ✔ Names and addresses match IRS records
- ✔ Addresses in U.S. states and D.C.
- ✔ One or more of these tax matters from the year 2000 forward:
  - Form 1040 Income Tax
  - Split Spousal Assessment or Form 8857 Innocent Spouse Relief
  - Shared Responsibility Payment
  - Shared Responsibility Payment - Split Spousal Assessment
  - Civil Penalty
- ✔ Revoke any prior authorization(s) on file with the IRS for the same tax matters and tax periods
- ✔ Client can log in to their account at www.irs.gov/account

START NOW

Mail or Fax Form 2848

Mail or fax a signed Form 2848 to the IRS if you need more options.

- ✔ Individual and business clients
- ✔ Name or address changes
- ✔ Addresses for any location
- ✔ One or more representatives
- ✔ Any tax matter and tax period
- ✔ Authorize other acts such as access IRS records via an Intermediate Service Provider
- ✔ Retain or revoke any prior authorization(s) on file with the IRS for the same tax matters and tax periods

DOWNLOAD FORM 2848

Tax Pro Account: Request POA

Notional

Before You Start Page (Screen 2 of 2)

How to Get a Power of Attorney Online

First: Prepare the information

To fill out the request, you'll need your:

- Centralized Authorization File (CAF) number
- Name and address on file with the IRS for your CAF number
- Client's name and address on file with the IRS
- Client's Social Security number or Taxpayer Identification Number
- Tax matters and periods for which you are requesting authorization. Only some tax matters may be requested online.
    - Form 1040 Income Tax
    - Split Spousal Assessment or Form 8857 Innocent Spouse Relief
    - Shared Responsibility Payment
    - Shared Responsibility Payment - Split Spousal Assessment
    - Civil Penalty

You cannot save requests to continue later.

Second: Complete the request

It should take between 10 and 20 minutes to complete the request.

After you submit the request, you'll get confirmation that it's been sent to your client's online account.

If the information you entered for your client is not correct, they will not see the request in their online account.

Third: Contact your client

Let your client know that they need to log in to their account at www.irs.gov/account to review, approve and electronically sign the request.

Fourth: Client approves or rejects and contacts you

Your client logs in to their account at www.irs.gov/account and approves by electronically signing. They also may reject the request.

The authorization will be active after your client approves and electronically signs.

Your client can print confirmation after they sign it, but a copy of the authorization won't be saved in your client's account or your account.

The IRS won't notify you whether your client approves or rejects the request.

Contact your client with any questions about the status of a request.

Notices

OMB Control Number: 1545-0150

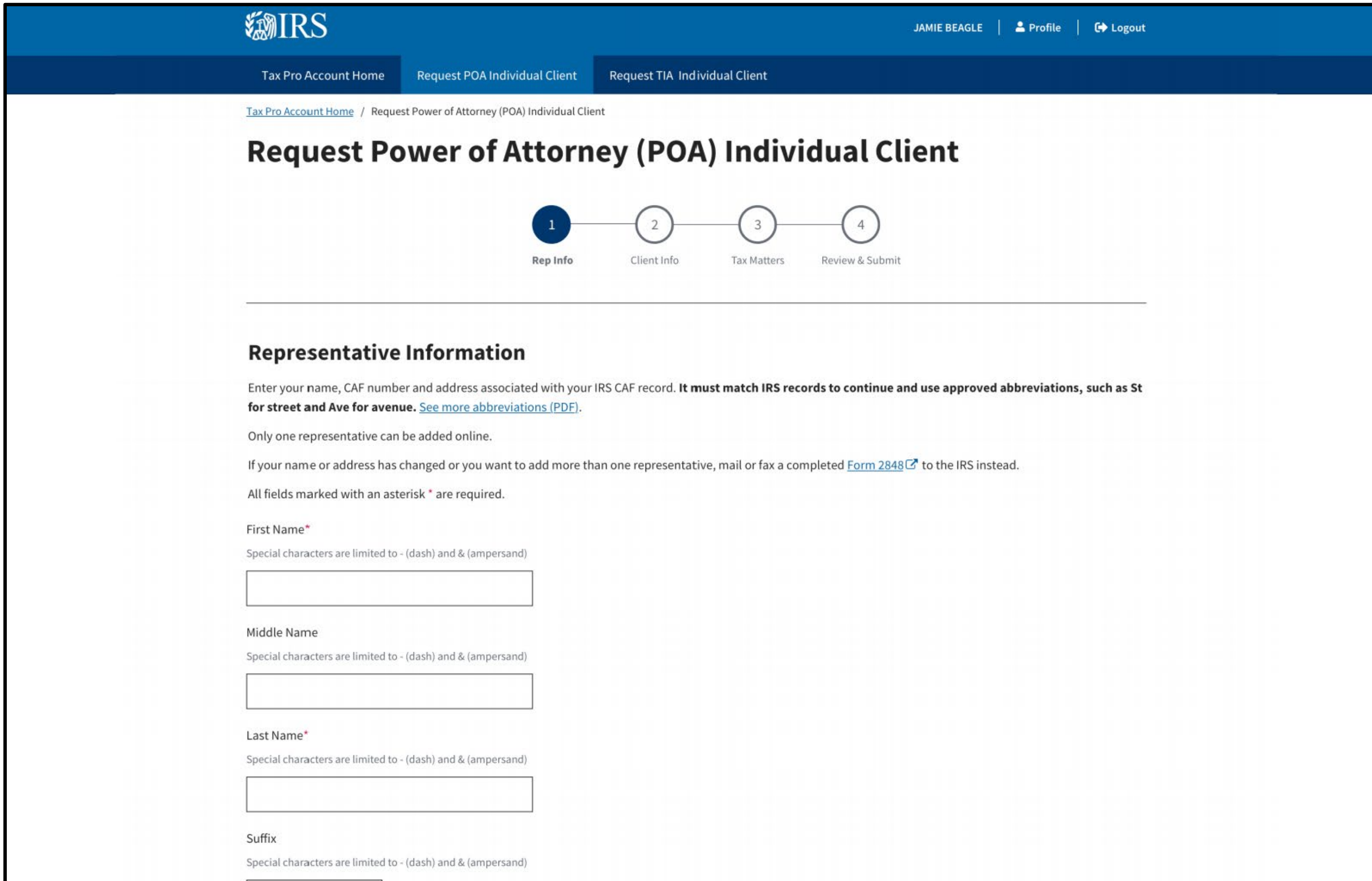
Privacy Act and Paperwork Reduction Act Notice

START NOW

Tax Pro Account: Request POA

Notional

Representative Information page - Step 1 (Screen 1 of 2)



JAMIE BEAGLE | Profile | Logout

Tax Pro Account Home | Request POA Individual Client | Request TIA Individual Client

Tax Pro Account Home / Request Power of Attorney (POA) Individual Client

Request Power of Attorney (POA) Individual Client

1 Rep Info — 2 Client Info — 3 Tax Matters — 4 Review & Submit

Representative Information

Enter your name, CAF number and address associated with your IRS CAF record. **It must match IRS records to continue and use approved abbreviations, such as St for street and Ave for avenue.** See more abbreviations (PDF).

Only one representative can be added online.

If your name or address has changed or you want to add more than one representative, mail or fax a completed Form 2848 to the IRS instead.

All fields marked with an asterisk * are required.

First Name*

Special characters are limited to - (dash) and & (ampersand)

Middle Name

Special characters are limited to - (dash) and & (ampersand)

Last Name*

Special characters are limited to - (dash) and & (ampersand)

Suffix

Special characters are limited to - (dash) and & (ampersand)

Representative Information page - Step 1 (Screen 2 of 2)

CAF Number* ?

Format example: 1234-56789

Address Line 1*

The number of characters is limited to 35. Special characters are limited to - (dash), / (forward slash), and & (ampersand)

Address Line 2

The number of characters is limited to 35. Special characters are limited to - (dash), / (forward slash), and & (ampersand)

City*

The number of characters is limited to 25. Special characters are limited to - (dash), / (forward slash), and & (ampersand)

State*

Two letter abbreviation

ZIP*

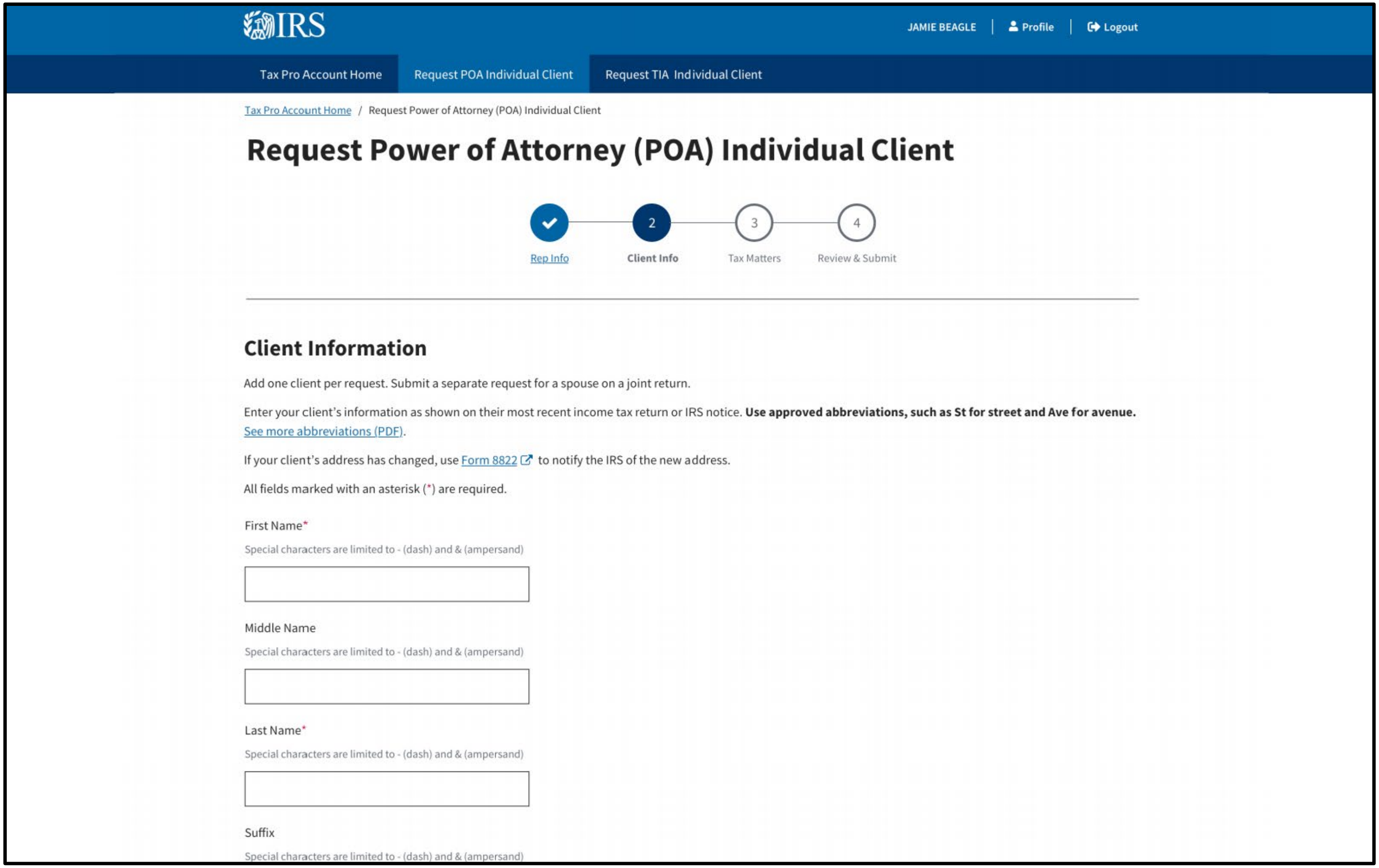
Five digits

BACK NEXT

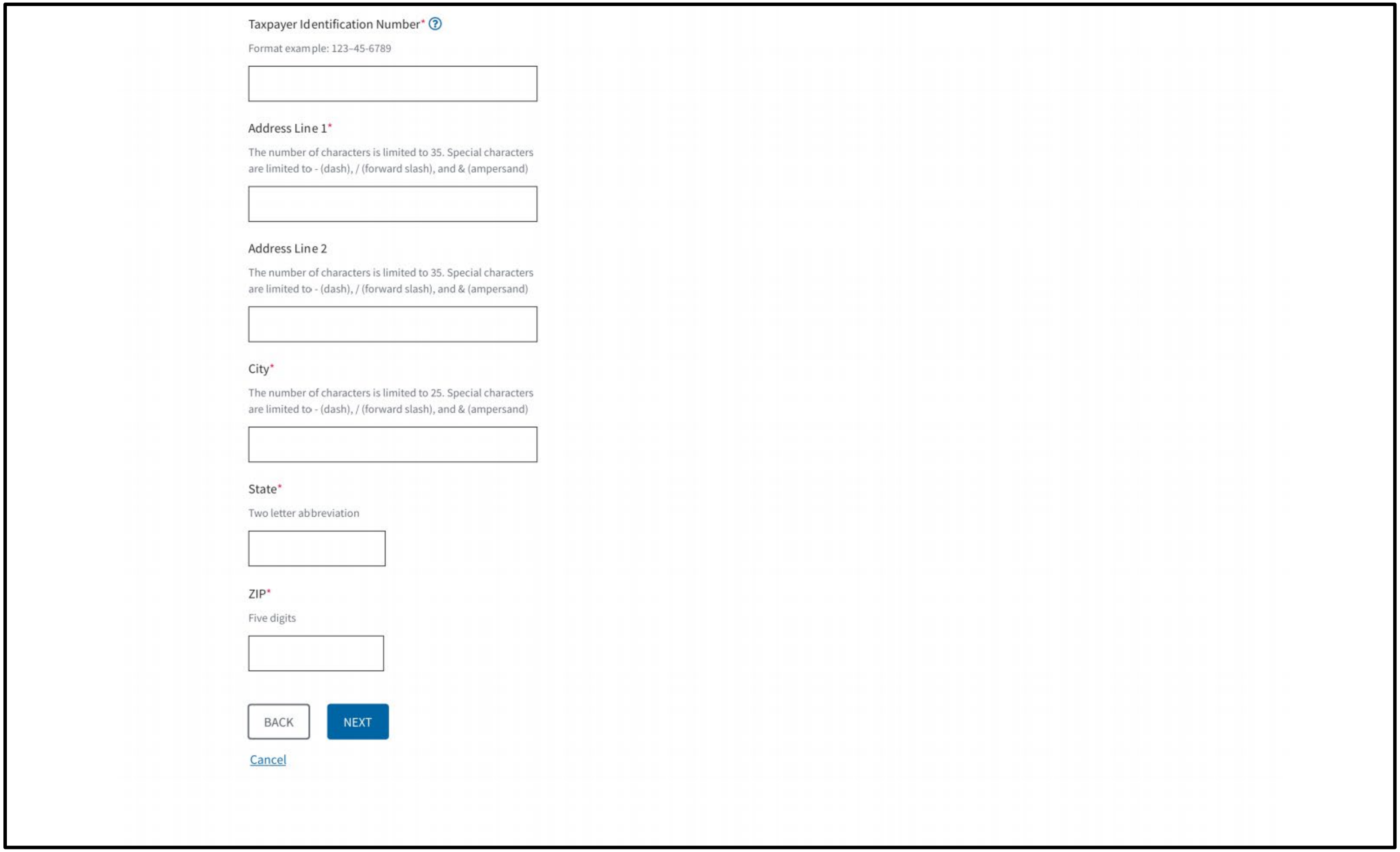
Cancel

Notional

Client Information page - Step 2 (Screen 1 of 2)



Client Information page - Step 2 (Screen 2 of 2)



Tax Pro Account: Request POA

Notional

Tax Matters page - Step 3 (Full Screen)

IRS

JAMIE BEAGLE | Profile | Logout

Tax Pro Account Home | Request POA Individual Client | Request TIA Individual Client

Tax Pro Account Home / Request Power of Attorney (POA) Individual Client

Request Power of Attorney (POA) Individual Client

Rep Info — Client Info — 3 Tax Matters — 4 Review & Submit

Tax Matters

Select the tax matters and periods for which you are requesting authorization. Tax periods are limited to the year 2000 up to three years from December 31 of the year we receive the power of attorney.

If you want to request authorization for something not included on this page, mail or fax a completed Form 2848 to the IRS instead.

All fields marked with an asterisk (*) are required.

Tax Matter(s)

You must select at least one tax matter. After you select the tax matter, you will be prompted to select the start and end date for the tax period(s).*

- [ ] Form 1040 Income Tax
- [ ] Split Spousal Assessment or Form 8857 Innocent Spouse Relief
- [ ] Shared Responsibility Payment
- [ ] Shared Responsibility Payment - Split Spousal Assessment
- [ ] Civil Penalty

Receive Notices

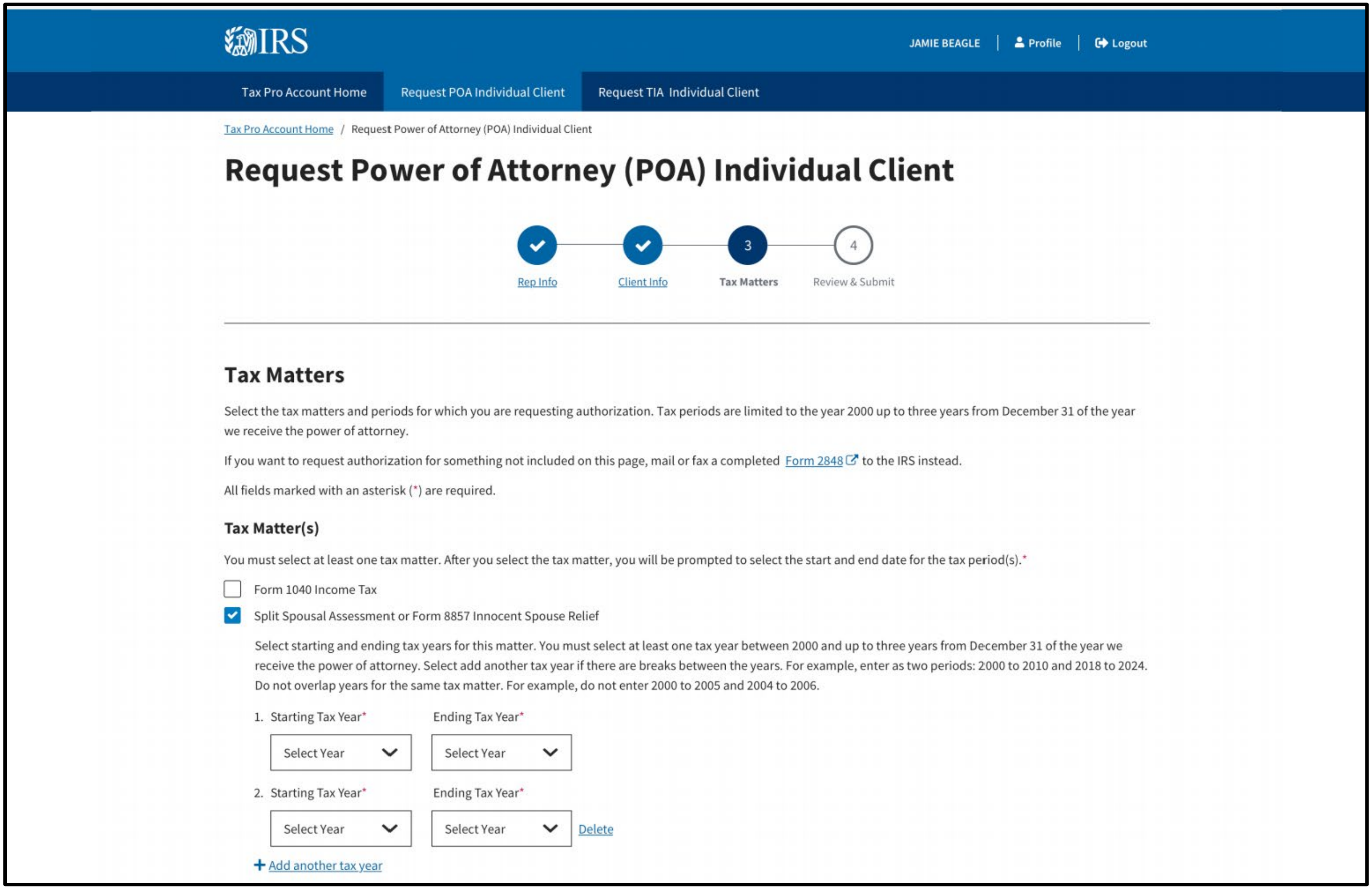
Do you want to receive by mail copies of notices and communications the IRS sends your client for these tax matters?*

( ) Yes ( ) No

BACK NEXT

Cancel

Tax Matters Expanded page - Step 3 (Screen 1 of 2)



Notional

Tax Matters Expanded page - Step 3 (Screen 2 of 2)

Tax Matter(s)

You must select at least one tax matter. After you select the tax matter, you will be prompted to select the start and end date for the tax period(s).*

- [ ] Form 1040 Income Tax
- [x] Split Spousal Assessment or Form 8857 Innocent Spouse Relief

Select starting and ending tax years for this matter. You must select at least one tax year between 2000 and up to three years from December 31 of the year we receive the power of attorney. Select add another tax year if there are breaks between the years. For example, enter as two periods: 2000 to 2010 and 2018 to 2024. Do not overlap years for the same tax matter. For example, do not enter 2000 to 2005 and 2004 to 2006.

1. Starting Tax Year* [Select Year] Ending Tax Year* [Select Year]
2. Starting Tax Year* [Select Year] Ending Tax Year* [Select Year] Delete

+ Add another tax year

- [ ] Shared Responsibility Payment
- [ ] Shared Responsibility Payment - Split Spousal Assessment
- [x] Civil Penalty

Select the tax period(s) for this matter. You must select at least one tax period between 2000 and up to three years from December 31 of the year we receive the power of attorney. Select add another tax period if there are breaks between periods. For example, enter as two periods: March 2000 to September 2010 and March 2018 to March 2024. Do not overlap tax periods for the same tax matter. For example, do not enter March 2000 to December 2005 and December 2004 to December 2006.

1. Starting Tax Period* [Select Month] [Select Year] Ending Tax Period* [Select Month] [Select Year]

+ Add another tax period

Receive Notices

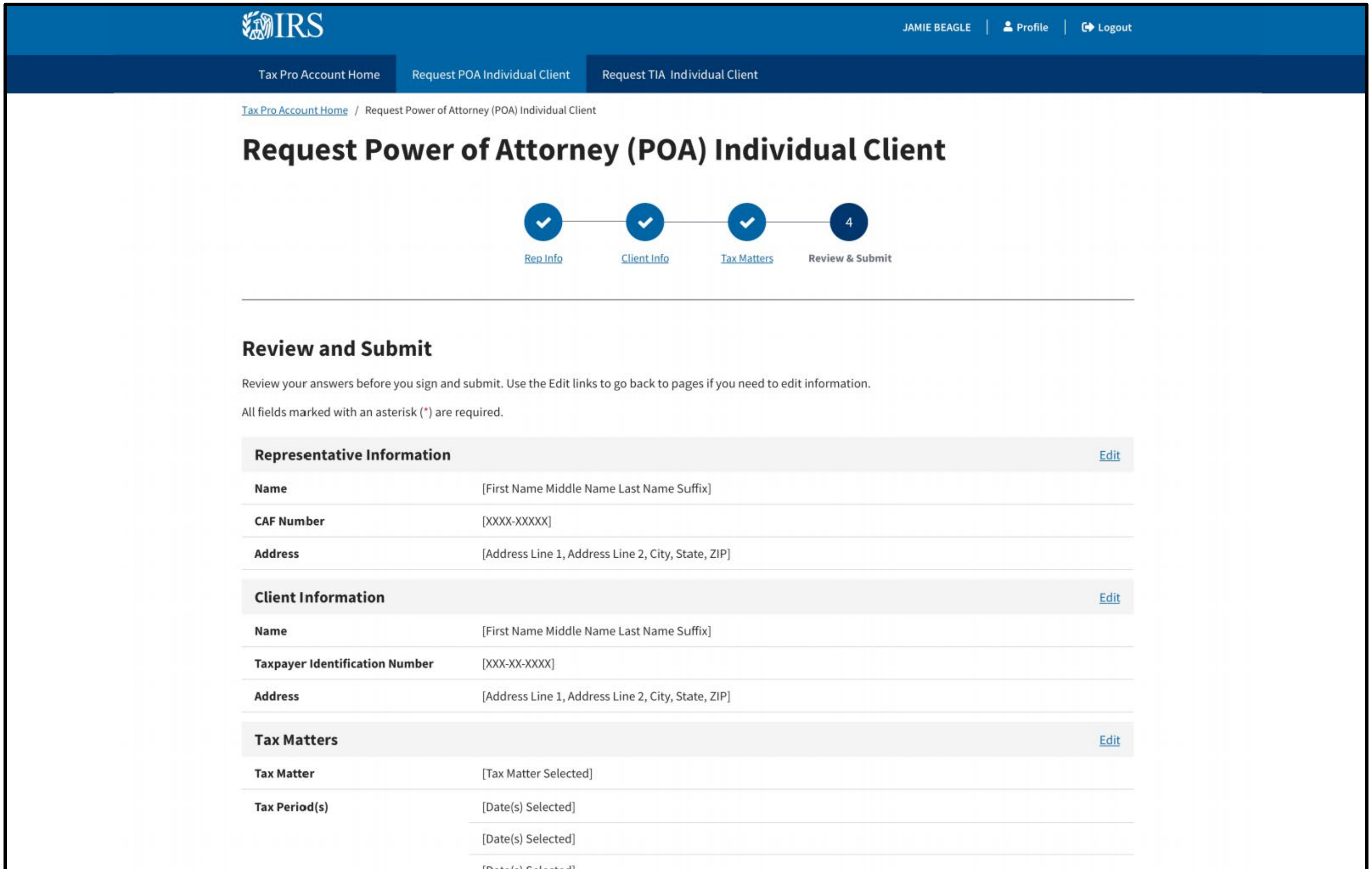
Do you want to receive by mail copies of notices and communications the IRS sends your client for these tax matters?*

( ) Yes ( ) No

BACK NEXT

Cancel

Review and Submit page (Step 4) – Screen 1 of 2



JAMIE BEAGLE | Profile | Logout

Tax Pro Account Home | Request POA Individual Client | Request TIA Individual Client

Tax Pro Account Home / Request Power of Attorney (POA) Individual Client

Request Power of Attorney (POA) Individual Client

Rep Info — Client Info — Tax Matters — 4 Review & Submit

Review and Submit

Review your answers before you sign and submit. Use the Edit links to go back to pages if you need to edit information.

All fields marked with an asterisk (*) are required.

Representative Information	Edit
Name	[First Name Middle Name Last Name Suffix]
CAF Number	[XXXX-XXXXX]
Address	[Address Line 1, Address Line 2, City, State, ZIP]

Client Information	Edit
Name	[First Name Middle Name Last Name Suffix]
Taxpayer Identification Number	[XXX-XX-XXXX]
Address	[Address Line 1, Address Line 2, City, State, ZIP]

Tax Matters	Edit
Tax Matter	[Tax Matter Selected]
Tax Period(s)	[Date(s) Selected]
	[Date(s) Selected]
	[Date(s) Selected]

Review and Submit page (Step 4) – Screen 2 of 2

Tax Matters Edit

Tax Matter	[Tax Matter Selected]
Tax Period(s)	[Date(s) Selected]
	[Date(s) Selected]
	[Date(s) Selected]
Tax Matter	[Tax Matter Selected]
Tax Period(s)	[Date(s) Selected]
	[Date(s) Selected]
Receive Notices	[Yes, No]

Declaration of Representative

I declare under penalties of perjury that:

- [ ] 1. I am not currently suspended or disbarred from practice, or ineligible for practice, before the Internal Revenue Service.*
- [ ] 2. I am subject to regulations contained in Circular 230 (31 CFR, Subtitle A, Part 10), as amended, governing practice before the Internal Revenue Service.*
- [ ] 3. I am authorized to represent the taxpayer identified in this request for the matters specified in this request.*

4. I am one of the following: (You will be prompted to enter your credentials.)*

- ○ Attorney in good standing of the bar of the highest court of the state.
- ○ Certified Public Accountant with an active license to practice in the state.
- ○ Enrolled Agent by the IRS per the requirements of Circular 230.
- ○ Enrolled Actuary by the Joint Board for the Enrollment of Actuaries under 29 U.S.C. 1242. The authority to practice before the IRS is limited by section 10.3(d) of Circular 230.
- ○ Enrolled Retirement Plan Agent under the requirements of Circular 230. The authority to practice before the IRS is limited by section 10.3(e) of Circular 230.

Electronic Signature

- [ ] Under penalties of perjury, I declare that, to the best of my knowledge and belief, all the entered information is true, correct, and complete.*

BACK SUBMIT

Cancel

Confirmation Page (Screen 1 of 2)

IRS

JAMIE BEAGLE | Profile | Logout

Tax Pro Account Home | Request POA Individual Client | Request TIA Individual Client

Tax Pro Account Home / Request POA Individual Client / Request POA Individual Client

Request Submitted

Rep Info — Client Info — Tax Matters — Review & Submit — 5 Confirmation

Success!

Your authorization request has been sent to your client's account for review and approval.

If the information you entered for your client is not correct, they will not see the request in their online account.

What Happens Next

Contact your client. Let your client know that they need to log in to their account at www.irs.gov/account to review, approve and electronically sign the request.

The authorization will be processed after your client approves and electronically signs. It may take up to two business days to process after your client signs.

Your client may print confirmation and give you a copy of the signed authorization.

The IRS won't notify you whether your client approves or rejects the request.

Contact your client with any questions about the status of a request.

Print Request for Power of Attorney

Print or save a copy of the request now.

You won't be able to view or print the request after you leave this page.

Representative Information

Confirmation Page (Screen 2 of 2)

Representative Information	
Name	[First Name Last Name]
CAF Number	[XXXX-XXXXX]
Address	[Address Line 1, Address Line 2, City, State, ZIP]

Client Information	
Name	[First Name Last Name]
Taxpayer Identification Number	[XXX-XX-XXXX]
Address	[Address Line 1, Address Line 2, City, State, ZIP]

Tax Matters	
Tax Matter	[Tax Matter Selected]
Tax Period(s)	[Date(s) Selected]
	[Date(s) Selected]
	[Date(s) Selected]
Tax Matter	[Tax Matter Selected]
Tax Period(s)	[Date(s) Selected]
	[Date(s) Selected]
Receive Notices	[Yes, No]

Declaration of Representative

I am not currently suspended or disbarred from practice, or ineligible for practice, before the Internal Revenue Service.

I am subject to regulations contained in Circular 230 (31 CFR, Subtitle A, Part 10), as amended, governing practice before the Internal Revenue Service.

I am authorized to represent the taxpayer identified in this request for the matters specified in this request.

I am a(n) [Attorney, CPA, Enrolled Agent, Enrolled Actuary, Enrolled Retirement Plan Agent, and applicable credentials]

Electronic Signature	
Signed by Representative	[Date]

Tax Pro Account: Taxpayer Respond to POA Request

Notional

Authorizations Tab in Online Account (Full Screen)

IRS

SUSAN BIRCH | Profile | Logout

Account Home | Account Balance | Payment Options | Payment History | Tax Records | Message Center | Authorizations

Account Home / Authorizations

Authorizations

You may authorize representatives to:

- Receive your confidential tax information by approving a Tax Information Authorization (TIA)
- Represent you before the IRS **and** receive your confidential tax information by approving a Power of Attorney (POA)

Authorizing someone to represent you does not relieve you of your tax obligations.

Online Requests from Tax Pros

View requests for authorization tax professionals submitted online.

Contact the tax professional if you have questions about a request.

Tax Pro Name	Date Requested	Status	Actions
Beagle, Jamie	10/14/2020	Pending	Approve/Reject
Hound, John	07/10/2020	Processing	View
Hound, John	06/16/2019	Rejected	View
Hound, John	07/16/2018	Approved	View
Eyre, Jane	09/24/2016	Failed	View

Authorization Forms

You may mail or fax a signed authorization to the IRS:

- Form 8821, Tax Information Authorization
- Form 2848, Power of Attorney and Declaration of Representative

IRS

Privacy Policy | Accessibility

Taxpayer Views Pending POA Request (Screen 1 of 2)

IRS

SUSAN BIRCH | Profile | Logout

Account Home · Account Balance · Payment Options · Payment History · Tax Records · Message Center · Authorizations

Account Home / Authorizations / Review Request for Power of Attorney (POA)

Review Request for Power of Attorney (POA)

[Tax Pro First Name Middle Name Last Name Suffix] requested authorization to represent you before the IRS. Your approval will allow them to receive your confidential tax information and represent you before the IRS for the tax matters listed in the request.

The tax professional requested this authorization, not the IRS.

Carefully review the request to make sure it is accurate.

Reject the request if:

- You did not request this authorization
- Any information is incorrect
- You don't want to approve the request

If you want to **approve**, you must **check the box** under Sign to Approve.

Contact the tax professional if you have questions about the request.

The authorization will be active after you review and approve it.

Request for Power of Attorney (POA)

Your Information	
Name	[Tax Pro First Name Middle Name Last Name Suffix]
Address	[Address Line 1, Address Line 2, City, ZIP]

Representative Information	
Name	[Tax Pro First Name Middle Name Last Name Suffix]
CAF Number ?	[1111-11111]
Address	[Tax Pro First Name Middle Name Last Name Suffix]
Declaration of Representative	The representative signed that they are a Certified Public Accountant who is not suspended or disbarred from practice before the IRS.
Signed by Representative	[Date(s) Selected]

Tax Pro Account: Taxpayer Respond to POA Request

Notional

Taxpayer Views Pending POA Request (Screen 2 of 2)

Representative Information

Name	[Tax Pro First Name Middle Name Last Name Suffix]
CAF Number ?	[1111-11111]
Address	[Tax Pro First Name Middle Name Last Name Suffix]
Declaration of Representative	The representative signed that they are a Certified Public Accountant who is not suspended or disbarred from practice before the IRS.
Signed by Representative	[Date(s) Selected]

Tax Matters

Tax Matter	[Tax Matter Selected]
Tax Period(s)	[Date(s) Selected]
Tax Matter	[Tax Matter Selected]
Tax Period(s)	[Date(s) Selected]
Receive Notices	The representative will receive copies of notices and communications the IRS sends you for these tax matters.

Sign and Submit

If you want to approve the request, check the box and then select Approve Request.

☐ By checking this box, I authorize the designated representative to represent me before the IRS and receive confidential tax information for the matters described in this power of attorney. Under penalties of perjury, I declare that, to the best of my knowledge and belief, all the entered information is true, correct, and complete.

REJECT REQUEST | APPROVE REQUEST

Cancel

Notices:

- OMB Control Number: 1545-0150
- Privacy Act and Paperwork Reduction Act Notice

IRS

Privacy Policy | Accessibility

Tax Pro Account: Taxpayer Respond to POA Request

Notional

Taxpayer Successfully Approves a POA Request (Screen 1 of 2)

IRS

SUSAN BIRCH | Profile | Logout

Account Home | Account Balance | Payment Options | Payment History | Tax Records | Message Center | Authorizations

Account Home / Authorizations / Authorization Approved

Authorization Approved

Success!

[Tax Pro First Name Middle Name Last Name Suffix] is authorized to represent you before the IRS and receive confidential tax information for the matters described in this power of attorney.

Authorization

You may want to give your tax professional a copy of the authorization. IRS doesn't notify the tax professional that you signed the authorization or send them a copy.

Your Information	
Name	[Tax Pro First Name Middle Name Last Name Suffix]
Address	[Address Line 1, Address Line 2, City, ZIP]

Representative Information	
Name	[Tax Pro First Name Middle Name Last Name Suffix]
CAF Number	[1111-11111]
Address	[Address Line 1, Address Line 2, City, ZIP]
Declaration of Representative	The representative signed that they are a Certified Public Accountant who is not suspended or disbarred from practice before the IRS.
Signed by Representative	[Date(s) Selected]

Tax Matters	
Tax Matter	[Tax Matter Selected]
Tax Period(s)	[Date(s) Selected]

Taxpayer Successfully Approves a POA Request (Screen 2 of 2)

Representative Information

Name	[Tax Pro First Name Middle Name Last Name Suffix]
CAF Number	[1111-11111]
Address	[Address Line 1, Address Line 2, City, ZIP]
Declaration of Representative	The representative signed that they are a Certified Public Accountant who is not suspended or disbarred from practice before the IRS.
Signed by Representative	[Date(s) Selected]

Tax Matters

Tax Matter	[Tax Matter Selected]
Tax Period(s)	[Date(s) Selected]
Tax Matter	[Tax Matter Selected]
Tax Period(s)	[Date(s) Selected]
Receive Notices	The representative will receive copies of notices and communications the IRS sends you for these tax matters.

Electronic Signature

Signed by Taxpayer	[Date(s) Selected]

Back to Authorizations

IRS Privacy Policy | Accessibility

Tax Pro Account: Authorization Processing

- After taxpayer signs and approves authorization, the IRS again checks to see if tax professional is in good standing.
- If authorization clears validation, it is posted immediately (at least within 48 hours) to the Centralized Authorization File (CAF).
- Ability to have multiple representatives per authorization:
  - Each tax professional initiates authorization from their own Tax Pro Account
  - Taxpayer must sign all authorizations on the same day.
  - Only two tax professionals can elect to receive copies of IRS notices and communications sent to taxpayer
    - If more than two tax professionals make an election, after approval of the first two authorization by the taxpayer, the remaining authorizations will not be processed.

Tax Pro Account: Future State

- IRS will continue to build on this initial release of Tax Pro Account to improve its features for authorization requests and, in later years, to add functionality as resources allow. Additional features requested and considered:
  - Tax professional's ability to view their authorization history, to include pending requests and statuses.
  - Notification to the taxpayer regarding action in their Online Account, to include pending authorization requests.
  - Taxpayer's ability to view their complete authorization history.
- IRS is also aware some taxpayers have difficulty creating Online Accounts (e.g., can't pass Secure Access registration) and is working on that issue.