

# **Tax Pro Account**

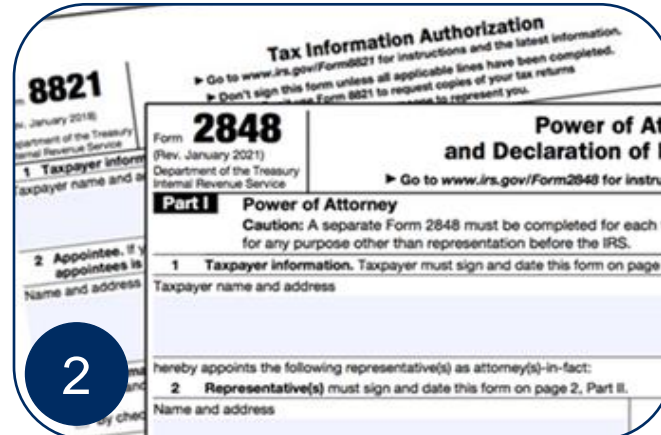
Online Account for Tax Professionals

# Objectives



Use Tax Pro Account to:

- View clients' tax information.
- Manage and submit authorizations.
- Leverage new features to make payments or create payment plans on behalf of individual taxpayers.

A close-up of two IRS forms. The top form is Form 2848, 'Power of Attorney and Declaration of Representative', with a blue circle containing the number '2' overlaid on the bottom left. The bottom form is Form 8821, 'Tax Information Authorization', with a blue circle containing the number '1' overlaid on the bottom left. The forms are partially overlapping and show various sections and instructions.

Distinguish between Tax Pro Account and "Submit Forms 2848 and 8821 Online."



Understand how features in IRS online accounts will impact tax management practices.

# Tax Pro Account

## Main Benefit

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All information and requests are processed in real time!

## Tax Professionals Can Save Time



Link or request a CAF number



View and withdraw from active authorizations



View clients tax information



Submit Powers of Attorney (POA) or Tax Information Authorizations (TIA)



Make a payment and create payment plans on behalf of individual taxpayers

# View Clients' Tax Information

**IRS** JOHN DEER Profile Logout

Tax Pro Account Home Authorization Requests Taxpayers

Account Home / Your Profile / Link Your CAF Number

## Link Your CAF Number

Do more in Tax Pro Account when you link your Centralized Authorization File (CAF) number. ?

This one-time process lets you:

- View active authorizations for individuals and businesses recorded on the CAF
- Withdraw in real-time from any active authorization

If you choose not to link your CAF number, you can still use Tax Pro Account, including requesting POAs and TIAs.

### How It Works

Linking your CAF number is a one-time process. It lets you view your active authorizations for individuals and businesses recorded on the CAF. The CAF number must be assigned to you as an individual and only you can link it. If you have more than one CAF number, you may link them all. To link your CAF number, you'll need to verify your identity as the person who is assigned the number. Follow these steps:

**STEP 1**

#### Request a PIN

To start the process, you'll need to request a Personal Identification Number (PIN). We'll mail your assigned PIN in an IRS notice to the address associated with your CAF number. Allow 1-2 weeks for the PIN to arrive.

**REQUEST PIN**

**STEP 2**

#### Enter the PIN

Enter your PIN and CAF number in Tax Pro Account to link your CAF number. Once the CAF number is linked, you can view your active authorizations for individuals and businesses recorded on the CAF.

**ENTER PIN**

**Link Your CAF Number**  
View information for all your individual and business taxpayer clients.

**IRS** JOHN DEER Profile Logout

Tax Pro Account Home Authorization Requests **Taxpayers**

Account Home / Taxpayers / Taxpayers Details

## Elk, Billy

**TIN:** 000-00-0456  
**CAF number:** 0000-11111

To view details for this taxpayer, select a tab.

**Limitations:** You can only view taxpayer details for the tax matters, forms and periods under your authorization. Details outside your authorization aren't shown.

Overview Authorizations **Account Balance** Payment Activity Payment Options

### Account Balance

**Total Amount Owed**  
**\$2,000.00**

Penalties and interest continue to accrue until tax is paid in full.  
The information provided is based on our current data.  
The numbers here may not reflect:

- Recently filed or processing returns

#### Details By Year

| Tax Year                 | You Owe           |
|--------------------------|-------------------|
| <b>2018</b>              | <b>\$1,000.00</b> |
| <b>2017</b>              | <b>\$1,000.00</b> |
| <b>Total Amount Owed</b> | <b>\$2,000.00</b> |

# Request a CAF Number

IRS

JOHN DEER Profile Logout

Tax Pro Account Home Authorization Requests Taxpayers

Account Home / Your Profile

## Your Profile

### Profile

Tax Professional Information

**CAF Numbers**

### Centralized Authorization File (CAF) Number

View your CAF numbers and addresses of record. If you got a CAF number by filing Forms 2848 or 8821, you can link it to view taxpayers with active authorizations.

You can request one CAF number online for each address, limited to 5 total. To request more, [submit Forms 2848 or 8821](#).

| CAF Number | Type       | Address of Record                   |
|------------|------------|-------------------------------------|
| 0000-12345 | Individual | 888 Rose Blvd, Washington, DC 20013 |
| 0000-12346 | Business   | 123 Main St, Danville, ME 12345     |
| 0000-12347 | Individual | 412 Second Ave, Arlington, VA 56545 |

[View Taxpayers](#)

[Link a CAF number](#) [Request a CAF number](#)

### Reminder

CAF numbers are assigned to the address you enter and linked to your name and taxpayer identification number (TIN).

# Submit Powers of Attorney (POA) or Tax Information Authorization (TIA)

IRS

JOHN DEER | Profile | Logout

Tax Pro Account Home | Authorization Requests | Taxpayers

## Welcome JOHN DEER

**What's new**

Payments on behalf of individual clients:

- Make a payment
- View and create payment plans

### Request Authorization

You can send a request for Power of Attorney (POA) or Tax Information Authorization (TIA) to a taxpayer's account. To request POA or TIA, you need a [Centralized Authorization File \(CAF\) number](#). If you don't have one, [request a CAF number](#).

[REQUEST POA](#) [REQUEST TIA](#)

### Notifications

- You Have Approved Requests**  
[View your requests.](#)
- Get Notified by Email**  
Sign up in [your profile](#).

## How It Works

1. Prepare the request.
2. Complete the request.
3. Contact the taxpayer.
4. Taxpayer authorizes or rejects and contacts you.

# View and Withdraw From Active Authorizations

The screenshot shows the IRS Tax Pro Account interface. The main navigation bar includes 'Tax Pro Account Home', 'Authorization Requests', and 'Taxpayers'. The 'Taxpayers' tab is selected, and the 'Elk, Billy' taxpayer profile is displayed. The 'Active Authorizations' table lists two authorizations: 'Form 2848' (signature date 08/22/2019, periods Dec 2006 - Dec 2015) and 'Form 8821' (signature date 08/21/2019, periods Dec 2006 - Dec 2015). A red arrow points from the 'Form 2848' link to the 'Form 2848, Power of Attorney and Declaration of Representative' details page. On this page, the 'Withdraw this Authorization' button is highlighted with a red box. The details page includes sections for 'Form Details', 'Authorization Information', and 'Acts Authorized'. A 'WITHDRAW' button is visible at the bottom of the details page.

| Type                      | Signature Date | Periods             |
|---------------------------|----------------|---------------------|
| <a href="#">Form 2848</a> | 08/22/2019     | Dec 2006 - Dec 2015 |
| <a href="#">Form 8821</a> | 08/21/2019     | Dec 2006 - Dec 2015 |

**Form 2848, Power of Attorney and Declaration of Representative**  
Signature Date: 08/22/2019

**Form Details**

|          |                     |
|----------|---------------------|
| Tax Form | 1040 Series         |
| Periods  | Dec 2008 - Dec 2015 |
| Tax Form | 1040 Series         |
| Periods  | Dec 2006 - Dec 2007 |

**Authorization Information**

|                 |  |
|-----------------|--|
| Designation     | Attorney   |
| Communications  | Authorized to receive copies of notices and other written communications |
| Acts Authorized | Modified POA form<br>Sign a Return<br>Substitute or Add Representatives  |

**Withdraw this Authorization**

You can withdraw an authorization at any time. Once you withdraw, the authorization is immediately and permanently removed from the CAF database. To withdraw this authorization, provide your electronic signature.

Electronic Signature

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

By checking this box, you are electronically signing your request to withdraw this authorization from the CAF database.\*

WITHDRAW

## How It Works

1. Select the authorization.
2. View details or withdraw the active authorization.

# Account Balance and Payment Activity

The screenshot shows the IRS Tax Pro Account interface for a taxpayer named Elk, Billy. The 'Taxpayers' tab is highlighted in yellow. The 'Account Balance' tab is circled in red. The total amount owed is \$2,000.00. A table shows details by year for 2018 and 2017, both with a balance of \$1,000.00.

**Elk, Billy**  
TIN: 000-00-0456  
CAF number: 0000-11111

To view details for this taxpayer, select a tab.

**Limitations:** You can only view taxpayer details for the tax matters, forms and periods under your authorization. Details outside your authorization aren't shown.

Overview | Authorizations | **Account Balance** | Payment Activity | Payment Options

### Account Balance

**Total Amount Owed**  
**\$2,000.00**

Penalties and interest continue to accrue until tax is paid in full.  
The information provided is based on our current data.  
The numbers here may not reflect:

- Recently filed or processing returns
- Pending payments or adjustments
- Information on your business account
- Installment agreement fees

[Frequently Asked Questions About Balances](#)

| Tax Year                 | You Owe           |
|--------------------------|-------------------|
| 2018                     | \$1,000.00        |
| <b>Income Tax</b>        |                   |
| Type                     | You Owe           |
| Assessed Total           | \$1,000.00        |
| <b>Income Tax Total</b>  | <b>\$1,000.00</b> |
| 2017                     | \$1,000.00        |
| <b>Total Amount Owed</b> | <b>\$2,000.00</b> |

The screenshot shows the IRS Tax Pro Account interface for a taxpayer named Elk, Billy. The 'Taxpayers' tab is highlighted in yellow. The 'Payment Activity' tab is circled in red. A callout box explains how it works: 'View payments made in the past five years.' The payment activity list is currently empty.

**Elk, Billy**  
TIN: 000-00-0456  
CAF number: 0000-11111

To view details for this taxpayer, select a tab.

**Limitations:** You can only view taxpayer details for the tax matters, forms and periods under your authorization. Details outside your authorization aren't shown.

Overview | Authorizations | Account Balance | **Payment Activity** | Payment Options

### Payment Activity

- Scheduled Payments
- Pending Payments
- Processed Payments
- Canceled Payments
- Returned Payments

## Reminder

Only details for the tax matters, forms and periods under the tax professional's authorization are shown.

# Make a Payment and Create Payment Plans on Behalf of Individual Taxpayers

**Payment Options**

| Make a Payment  | Short-Term Plan   | Long-Term Plan   |
|---|---|--|
| <ul style="list-style-type: none"><li>✓ No setup fee</li><li>✓ No additional penalties and interest if paid in full <a href="#">?</a></li></ul> <p><b>\$2,000.00</b><br/>Balance Due</p> <p>Pay other payment types such as:</p> <ul style="list-style-type: none"><li>• Amended Return <a href="#">?</a></li><li>• Estimated Tax <a href="#">?</a></li><li>• Extension <a href="#">?</a></li><li>• Proposed Tax Assessment <a href="#">?</a></li></ul> | <ul style="list-style-type: none"><li>✓ No setup fee</li><li>✓ Lower penalties and interest <a href="#">?</a></li></ul> <p>Select one term *:</p> <p><input type="radio"/> <b>\$339.00</b><br/>within 90 days</p> <p><input checked="" type="radio"/> <b>\$539.00</b><br/>within 180 days</p> | <ul style="list-style-type: none"><li>✓ Setup fee applies <a href="#">?</a></li><li>✓ Higher penalties and interest <a href="#">?</a></li></ul> <p><b>Pay Monthly</b></p> <p>View personalized plan terms and monthly amounts after you select a payment method option.</p> <p>Select one option *:</p> <p><input checked="" type="radio"/> Pay by Direct Debit<br/>\$22 setup fee<br/>Pay by automatic withdrawal</p> <p><input type="radio"/> Pay by Other Method<br/>\$69 setup fee<br/>Pay manually each month via credit card or Make a Payment</p> |
| <b>MAKE A PAYMENT</b>   | <b>APPLY FOR SHORT-TERM PLAN</b>  | <b>APPLY FOR LONG-TERM PLAN</b>  |

## Payment options

- Make same-day payments using a checking or savings account.
- Create short-term or long-term installment agreements.
- Revise the payment amount, payment date, or payment plan type.

# Virtual Assistant and Live Chat

The screenshot shows the IRS Tax Pro Account Home page. At the top, there is a blue header with the IRS logo on the left and user information 'JOHN DOE' with a dropdown arrow, 'Profile' with a person icon, and 'Logout' with a door icon. Below the header is a dark blue navigation bar with links for 'Tax Pro Account Home', 'Authorization Requests' (with a dropdown arrow), and 'Taxpayers'. The main content area is white and features a large 'Welcome JOHN DOE' heading. Below this is a 'Request Authorization' section with a paragraph explaining the need for a Centralized Authorization File (CAF) number and two buttons: 'Request POA' and 'Request TIA'. To the right of this section are three vertical tiles: 'Notifications' with a 'Get Notified by Email' button and a link to 'your profile'; 'Forms 2848 and 8821' with a link to 'secure form upload'; and 'Transcript Delivery System (TDS)' with an 'ACCESS TDS' button and an 'About TDS' link. Below these are two larger white boxes: 'Your Requests' with a 'View Your Requests' link, and 'Taxpayers' with a 'View Taxpayers' link. In the bottom right corner, a yellow-bordered chat window is overlaid, showing the IRS Automated Chat Bot interface with a disclaimer, a list of topics, and a text input field.

**How It Works**

- Automated chat bot offers relevant knowledge articles.
- Live chat is available for collection issues.

# Tax Pro Account vs. Submit Forms Online

An official website of the United States Government

IRS

Help | News | English | Tax Pros | Sign in

File Pay Refunds Credits & Deductions Forms & Instructions Search

Home / Tax Pros / Submit power of attorney and tax information authorizations

## Submit power of attorney and tax information authorizations

**Enrolled agents**

**Annual Filing Season Program participants**

**Certified Professional Employer Organization (CPEO)**

**Enrolled actuaries**

**E-file providers**

**Modernized e-File**

You have these options to submit Power of Attorney (POA) and Tax Information Authorization (TIA).  
Find more about [Power of Attorney and other authorizations](#).

### Use Tax Pro Account

Submit authorization request to taxpayer's online account.

- ✓ All-digital submission
- ✓ Electronic signature
- ✓ Real-time processing

Use for:

- Individual taxpayer with online account
- Limited tax matters and periods
- Prior authorizations revoked for same tax matters or periods

**Use Tax Pro Account**

### Submit forms online

Submit Forms 2848 and 8821 online to the IRS.

- ✓ Secure form upload
- ✓ Electronic or handwritten signature
- ✓ First-in, first-out processing

Use for:

- Individual or business taxpayer
- Any tax matter or period
- Prior authorizations retained or revoked

**Submit forms online**

**Fax or mail Forms 2848 and 8821**

## The Difference

When the taxpayer approves the request for authorization, it's processed to the CAF *in real-time*.