New Online Features for Tax Pros: Do Business Faster and Easier with IRS Online

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48th Annual Delaware Federal and State Tax Institute
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Can you feel it in the air?
It's the time of year when Tax Pros begin renewing their Preparer Tax ID Numbers.
It's PTIN renewal season. Get started at:
IRS
irs.gov/ptin

- Tax Pro Account Overview
- Online Account Overview
- Business Tax Account Overview

Tax Pro Account

Tax Pro Account: Options for Submit POAs and TIAs

IRS

Help | News | English | Charities & Nonprofits | Tax Pros

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**
- **Enrolled Retirement Plan Agents**
- **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

If you can't use an online option, you can fax or mail authorization forms to us.

✔ Paper forms by fax or mail
✔ Handwritten signature only
✔ First-in, first-out processing

Expansion of Taxpayer Options for 3rd Party Authorizations launched in the summer of 2021

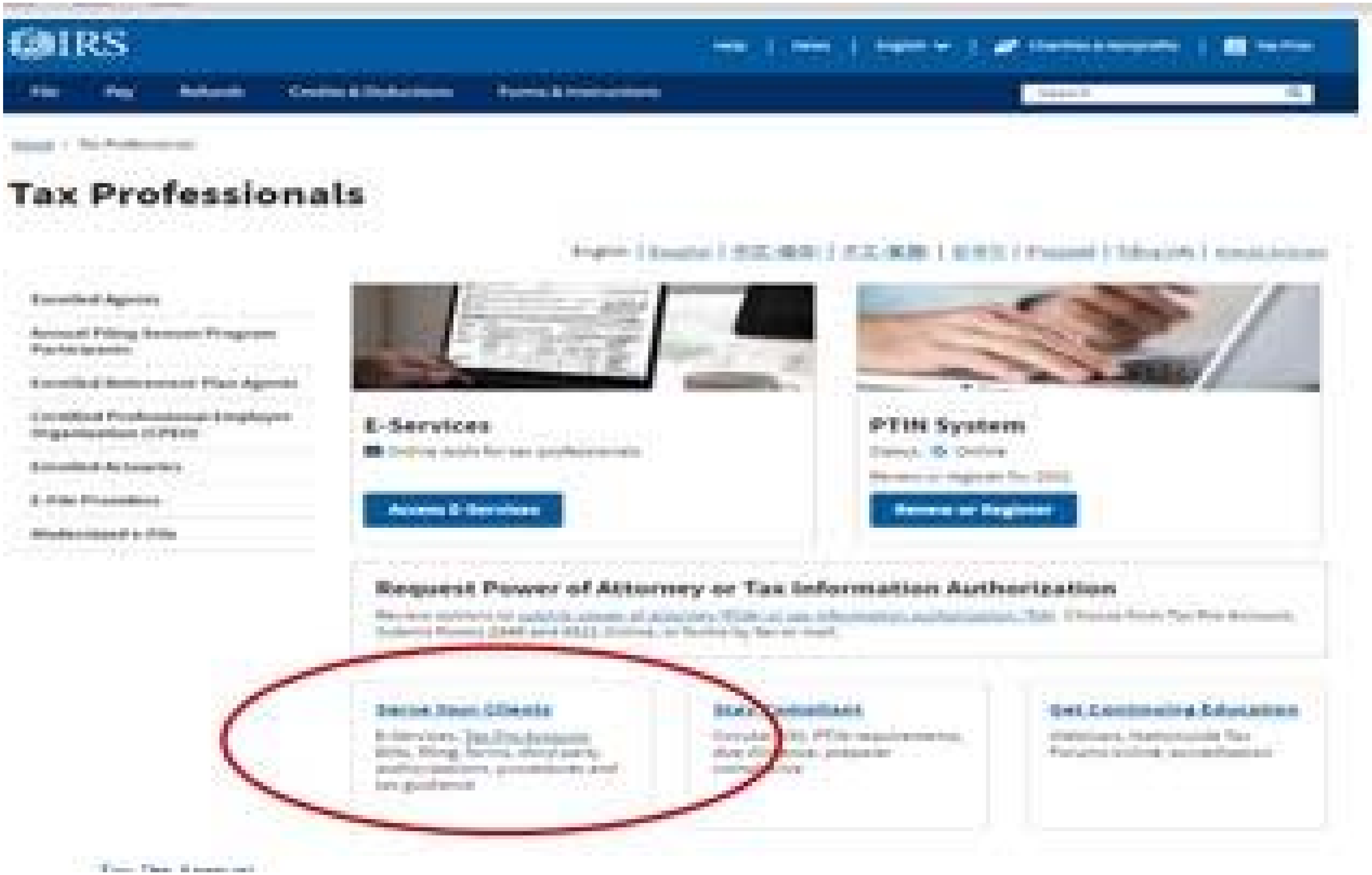
- Added “authorization” feature to individual Online Accounts.
- Launched Tax Pro Account on IRS.gov to allow tax professionals to initiate online POA or TIA requests.
  - Tax professional initiates a POA or TIA, uses checkbox as electronic signature for POAs.
  - POA or TIA requests automatically transfers to individual taxpayer’s Online Account.
  - Taxpayer accesses their Online Account and under the “Authorization” tab they can approve the request and use a checkbox as signature.
  - Upon approval, authorization is posted immediately to CAF.

Registering to Access the Tax Pro Account

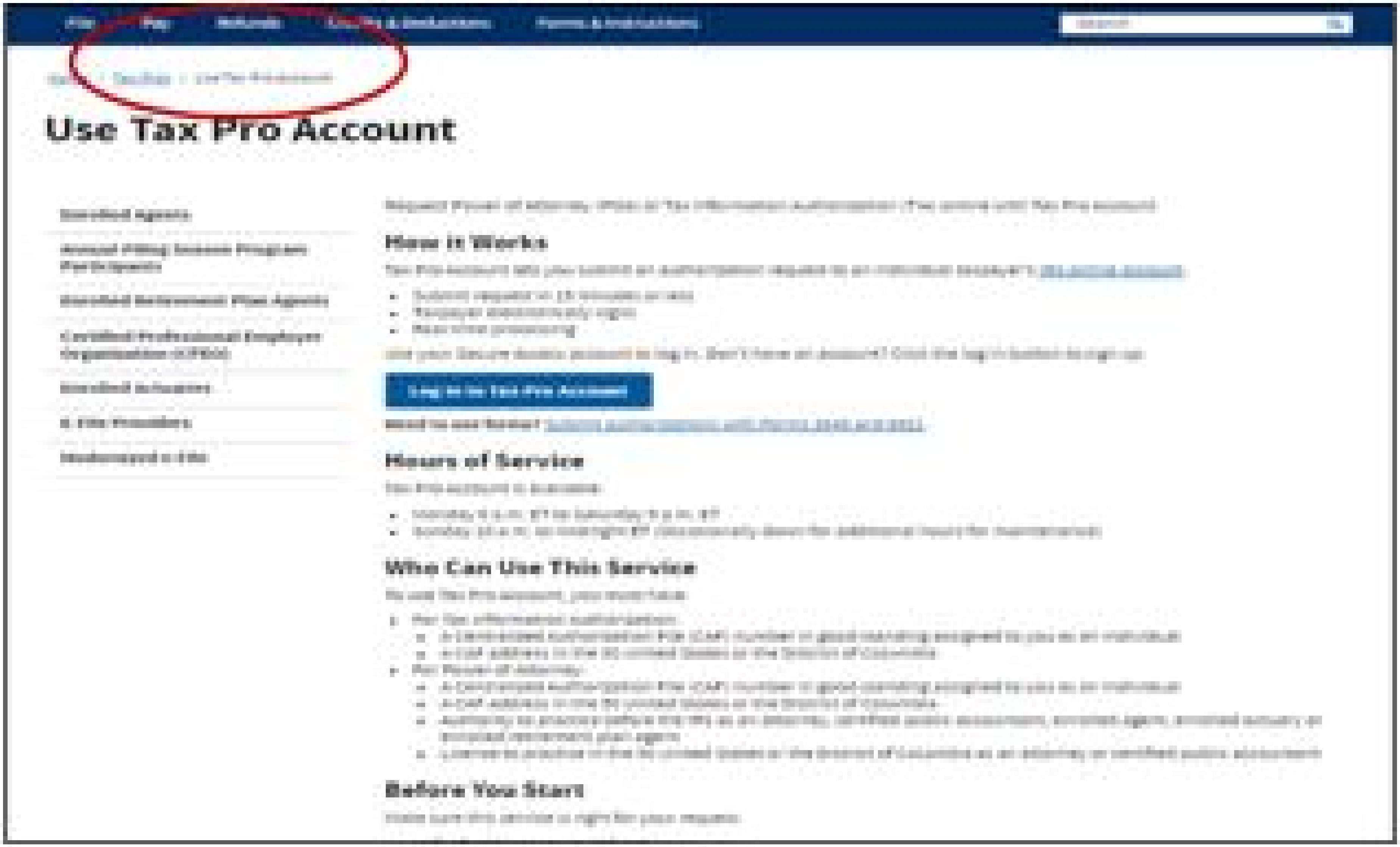
To use Tax Pro Account, individuals must create an account and verify their identity.

- Individuals already registered for Secure Access (e.g., Get Transcript, e-Services) can use the Tax Pro Account to initiate POAs and TIAs.
- New users will need to create an account with ID.me.
- To verify your identity with ID.me, you will need a photo ID and a device with a camera.
- Frequently asked questions with help links are available right on the sign-in page for Tax Pro Account & Online Account in case you or your clients have any questions.

Tax Pro Account: Tax Professionals Page



Tax Pro Account: Landing Page

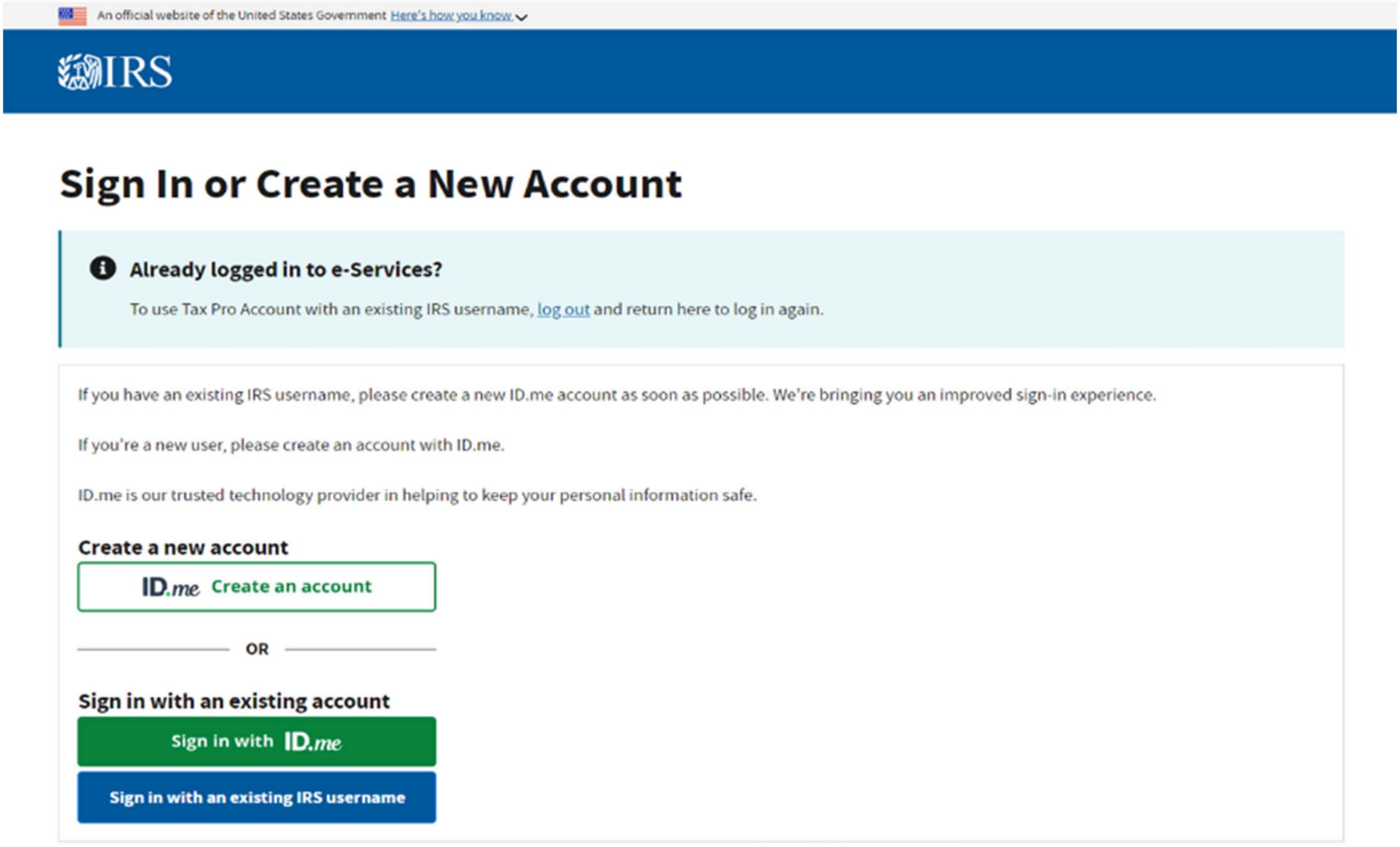


Tax Pro Account: Help Topics

Help Topics

- Online Account Access
- Display of Request Status
- Display of Authorization History
- CAF Address
- Taxpayer Address
- Multiple Representatives
- Overlapping Tax Periods
- Tax Year and Tax Matter Limitations
- Copy of Authorization Request
- If You Don't Have a CAF Number
- Tax Pro Account vs. Submit Forms 2848 and 8821 Online

Sign In with ID.me or an IRS username



Tax Pro Account

The IRS is setting the stage for taxpayers and tax professionals across the country to gain seamless self-service options to access information and resolve issues, while maintaining the security they've come to expect.

Tax Pro Account provides tax professionals with a digital self-service portal they can rely on to manage their authorization relationship with taxpayers and view the taxpayers' information.

This presentation will provide you a view of the new capabilities in Tax Pro Account.

New Capabilities Currently Available

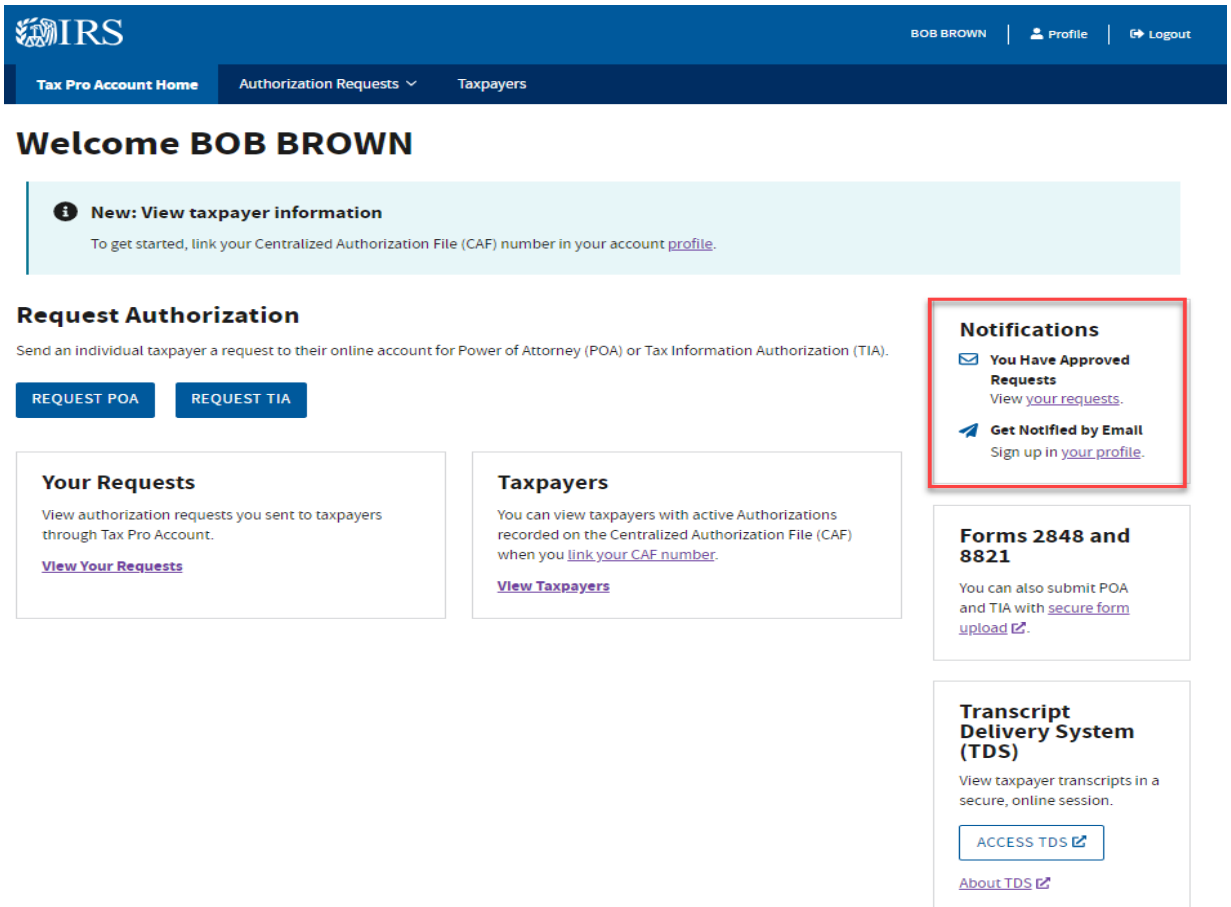
The following Tax Pro Account capabilities deployed during Fiscal Year 2023:

- **In-App Notification deployed May 2023 (Tax Pro Account Home Page)** – Provides messaging to notify tax professionals when an approved authorization has been received.

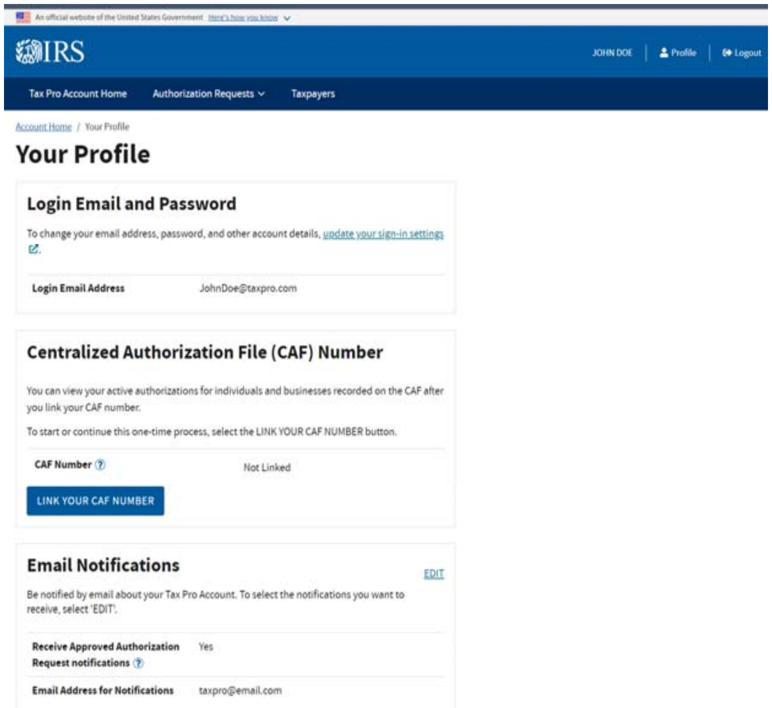
- **Link a CAF deployed August 2023** – Allows linking a Centralized Authorization File (CAF) number in the Profile to view and/or withdraw active Powers of Attorney (POAs) and Tax Information Authorizations (TIAs) the IRS has on file. When the tax professional withdraws an authorization, a notice will be sent to the taxpayer.

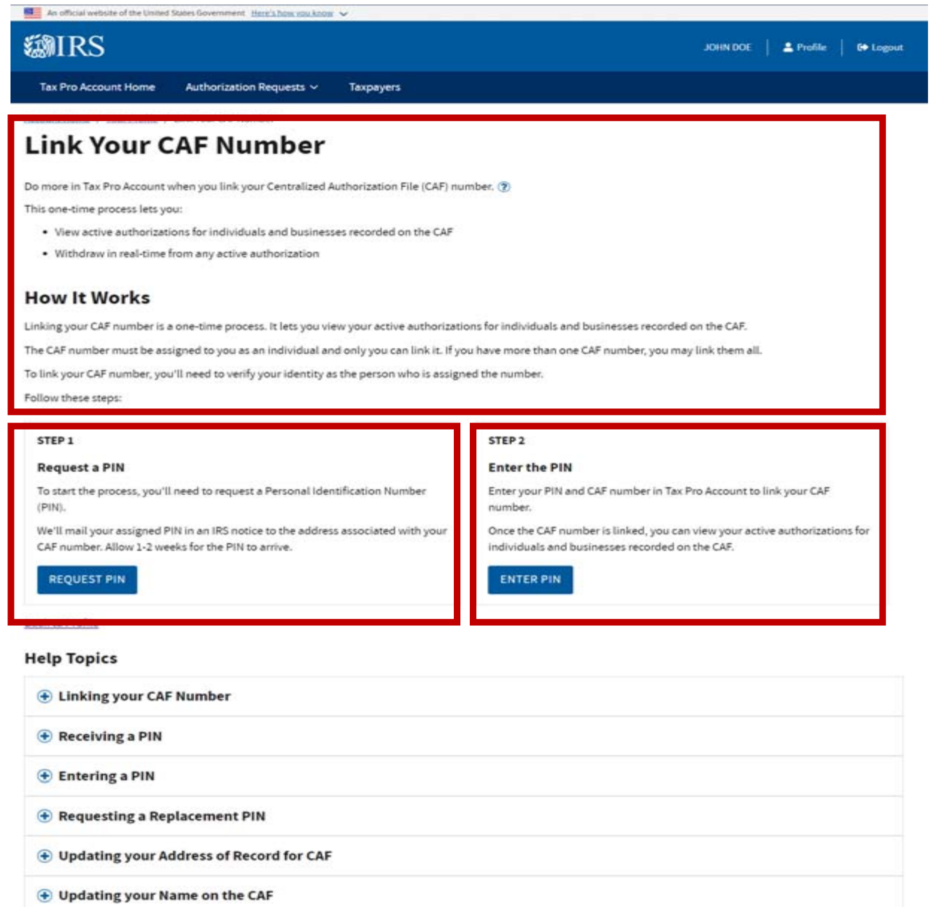
- **View Balance Due deployed September 2023** – Allows tax professionals to view individual client's balance due for authorized tax periods of their authorized clients.

Tax Pro Account - Home Page

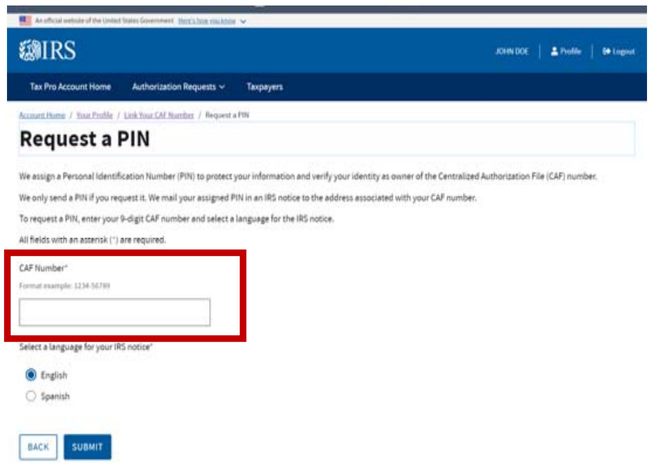


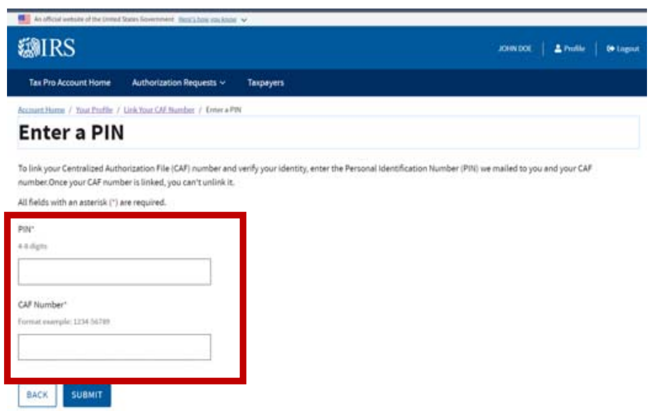
Tax Pro – Profile Page
Link Your CAF Number

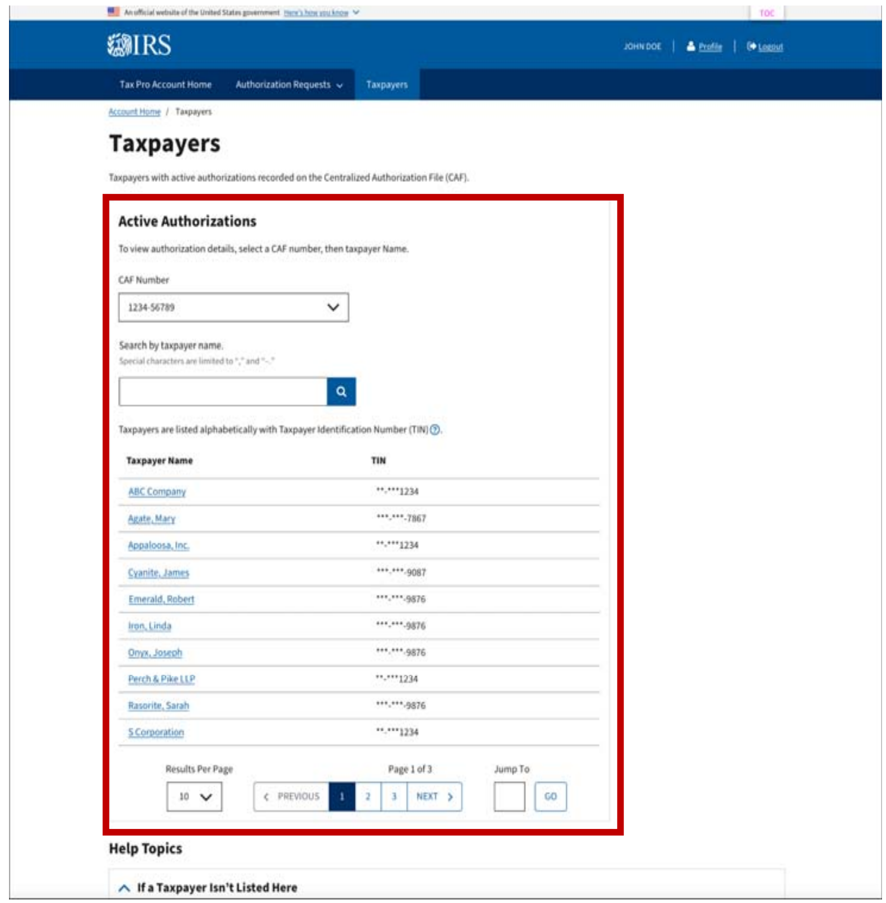




Tax Pro – Link a CAF & Taxpayer List







Tax Pro – Authorization List & Details

An official website of the United States government Here's how you know

IRS

JOHN DOE | Profile | Logout

Tax Pro Account Home | Authorization Requests | Taxpayers

Account Home / Taxpayers / Taxpayer Details

Taxpayer Details

Agate, Mary

TIN: 777-99-1111

Authorizations

To view or withdraw an authorization for this taxpayer, select the authorization Type. Authorizations are listed by the most recent Signature Date.

Type	Signature Date	Periods	Tax Form
Form 2848	08/21/2022	Multiple	Multipe
Form 8821	07/12/2022	Multiple	Multiple
Form 706	03/17/2022	Dec 2021 - Dec 2024	709 Series
Form 8821	07/12/2021	Multiple	Multiple
Form 706	03/17/2021	Dec 2020 - Dec 2022	709 Series
Form 8821	07/12/2020	Multiple	Multiple
Form 706	03/17/2020	Multiple	709 Series
Form 8821	07/12/2019	Multiple	Multiple
Form 706	03/17/2019	Dec 2018 - Dec 2020	709 Series
Form 8821	07/12/2018	Multiple	Multiple

Results Per Page 10 | PREVIOUS 1 2 3 NEXT | Page 1 of 3 | Jump To GO

Back to Taxpayers

Help Topics

Type of Authorization

An authorization is recorded on the CAF as a form number, based on its type:

- Form 2848, Power of Attorney and Declaration of Representative
- Form 8821, Tax Information Authorization
- Form 706, United States Estate (and Generation-Skipping Transfer) Tax Return

Tax Pro Account Home | Authorization Requests | Taxpayers

Account Home / Taxpayers / Taxpayer Details / Authorization Details

Authorization Details

Agate, Mary

TIN: 777-99-1111

Form 2848, Power of Attorney and Declaration of Representative

Signature Date: 08/21/2019

Form Details

Tax Form	1040 Series
Periods	Dec 2015 - Dec 2017 | Jun 2018 | Dec 2018 - Dec 2020
Plan Number	xxx
Tax Form	Civil Penalty
Periods	Dec 2006 - Dec 2007 Sep 2009 Dec 2010 - Dec 2012 Dec 2015 - Dec 2017 Jun 2018 Dec 2018 - Dec 2020

Authorization Information

Designation	Certified Public Accountant
Communications	Authorization to receive copies of notices and other written communications
Acts Authorized	Modified POA form, for changes other than the signature Power of signature modification Taxpayer allows Rep to disclose to other third parties

Back to Taxpayer Details

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.

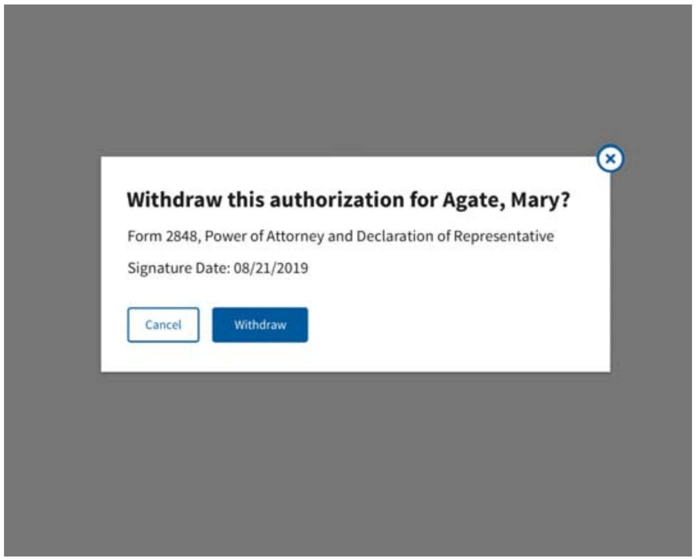
Electronic Signature

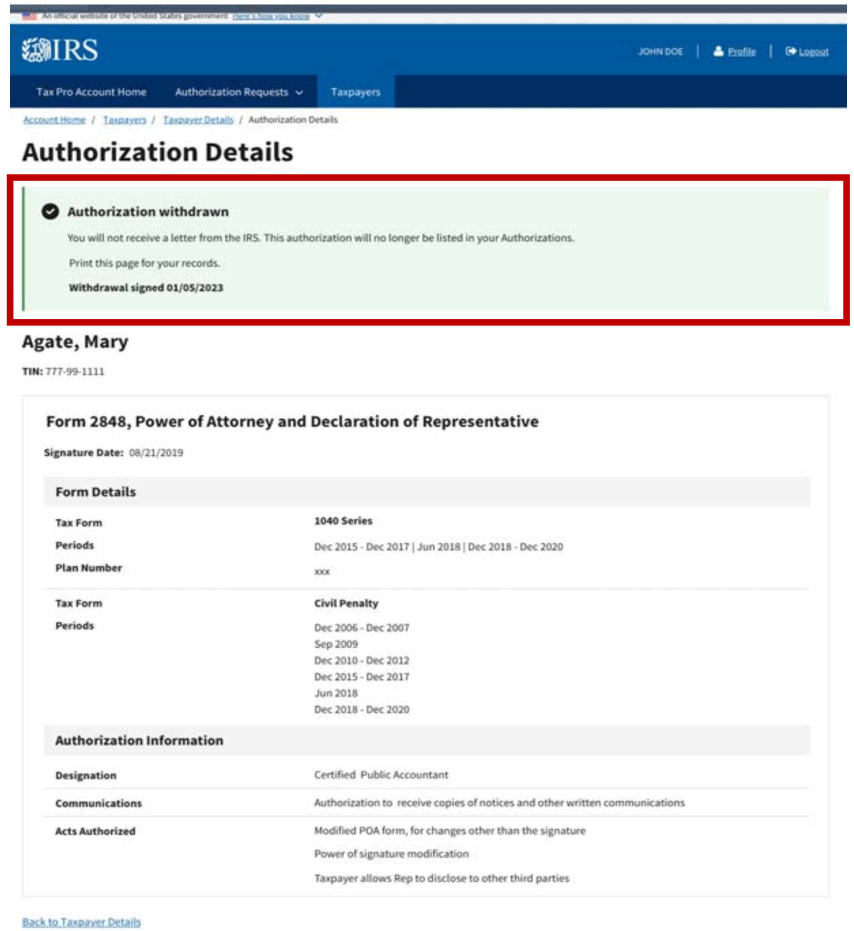
All fields marked with an asterisk (*) are required.

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

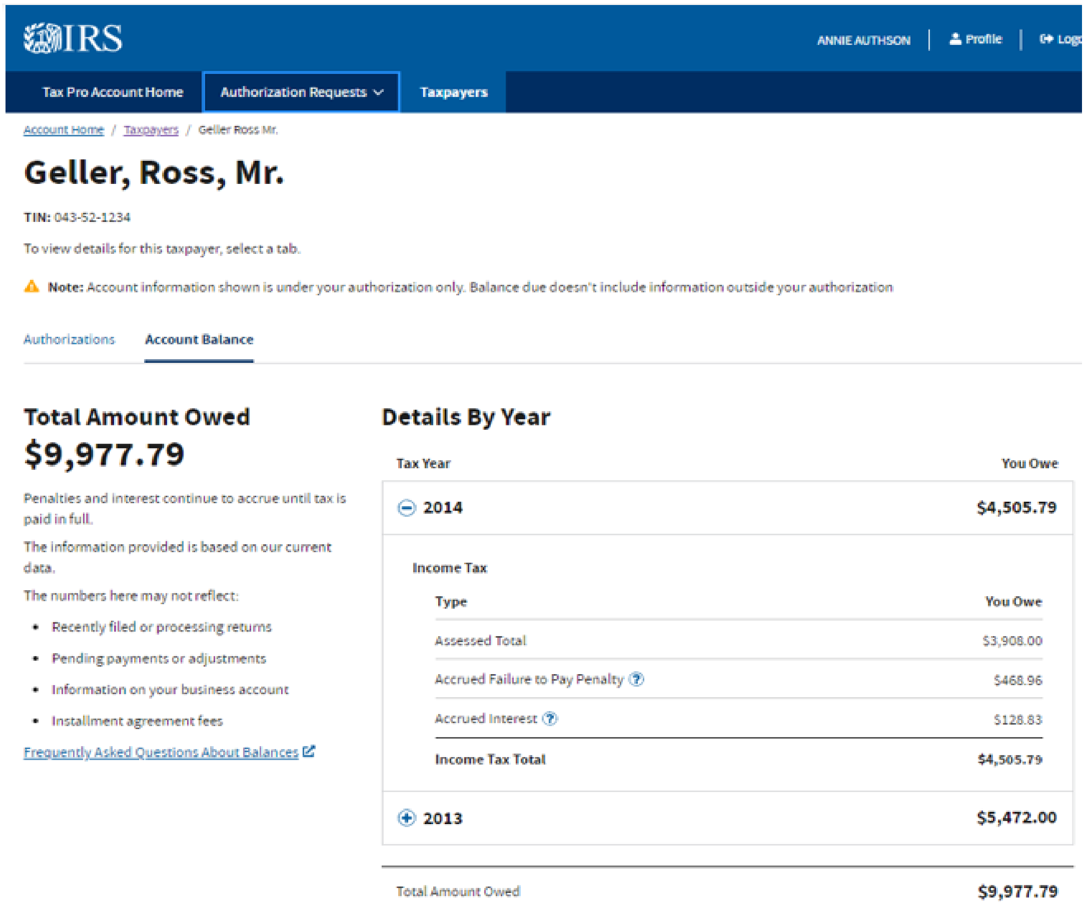
Back | Withdraw

Tax Pro – Withdraw Authorizations





Tax Professionals - View Balance Due

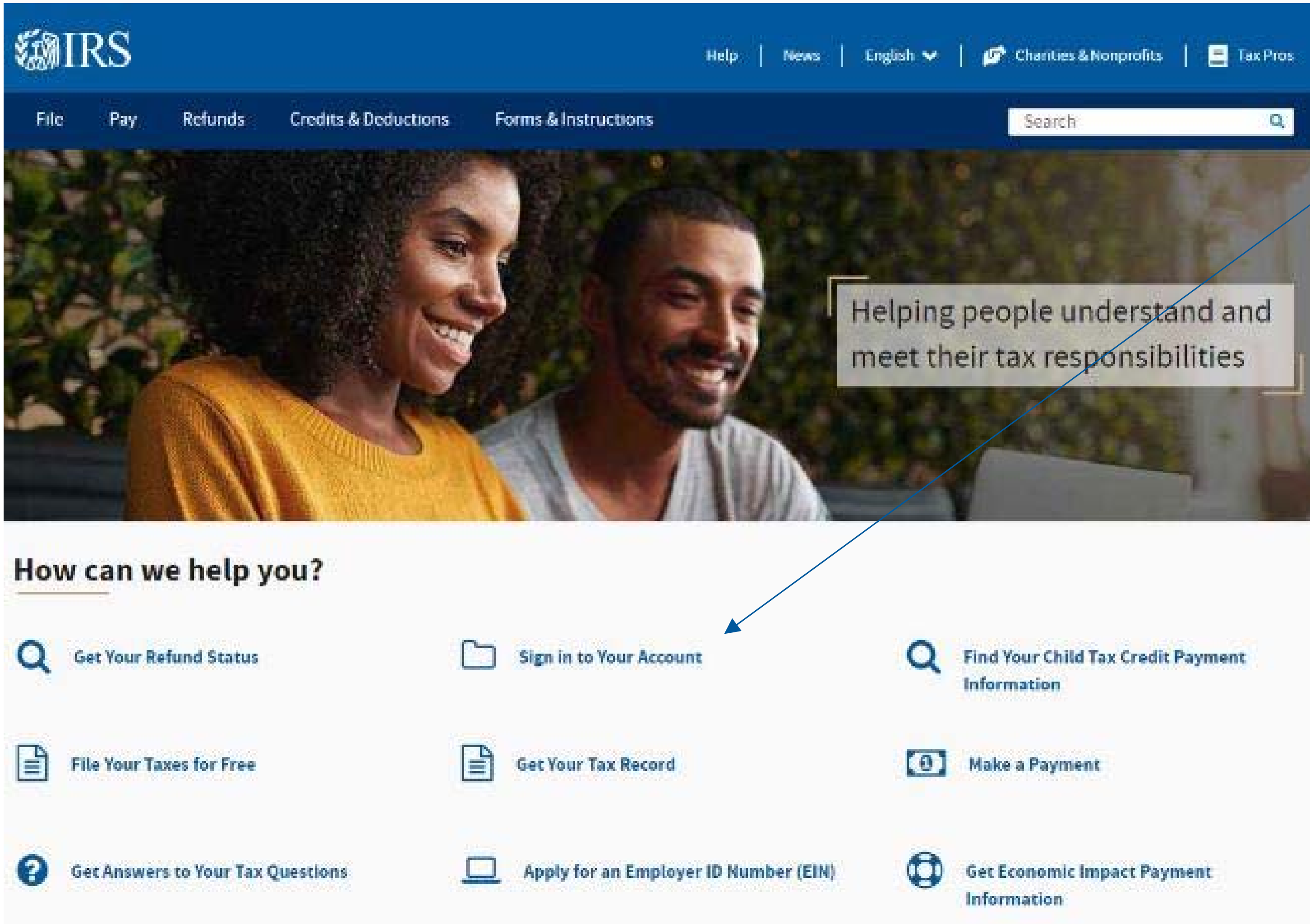


IRS

Online Account

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

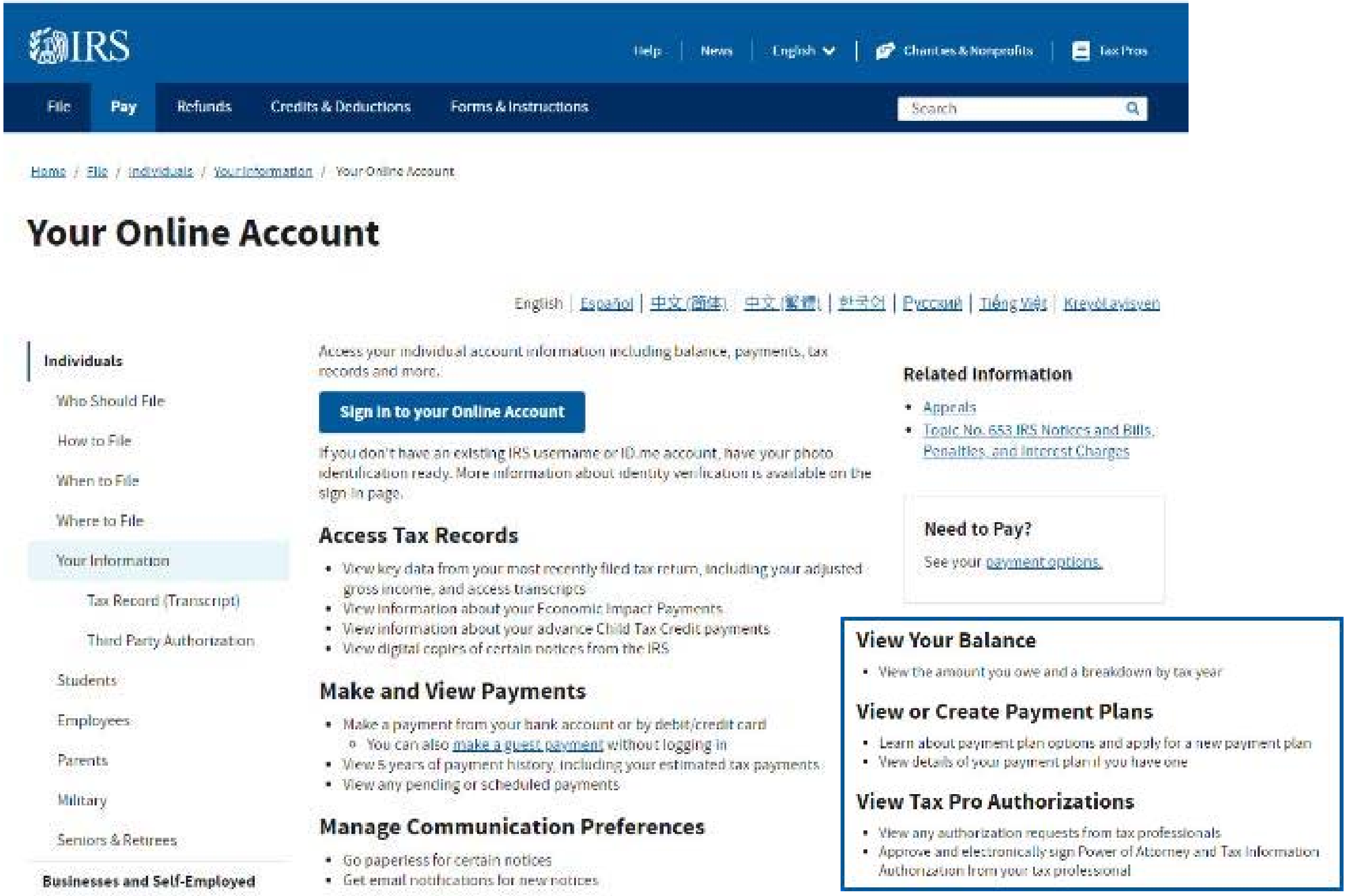
IRS.gov home page takes you to Online Account



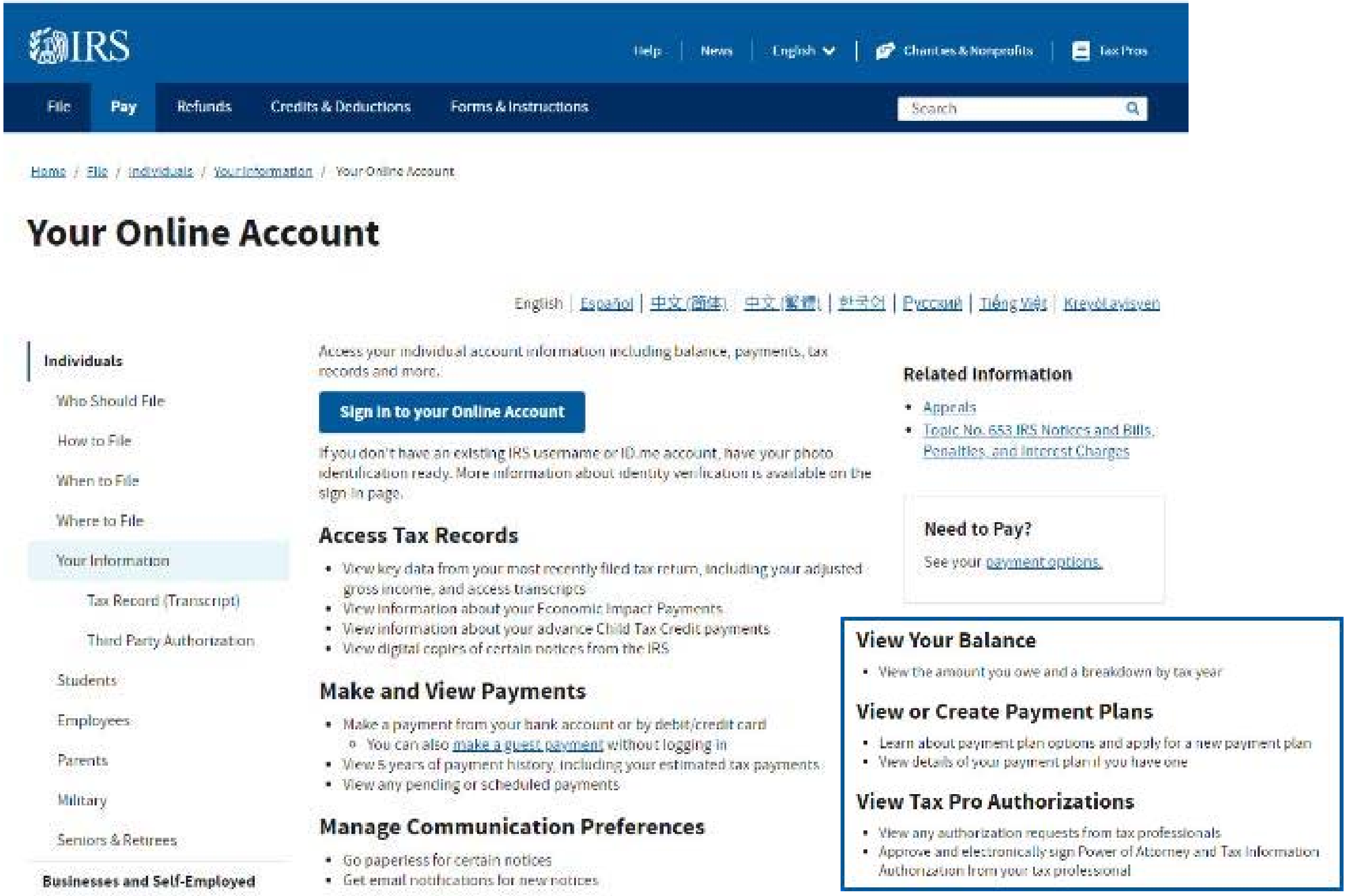
Access Online Account

Taxpayers can access their online account from the IRS.gov home page

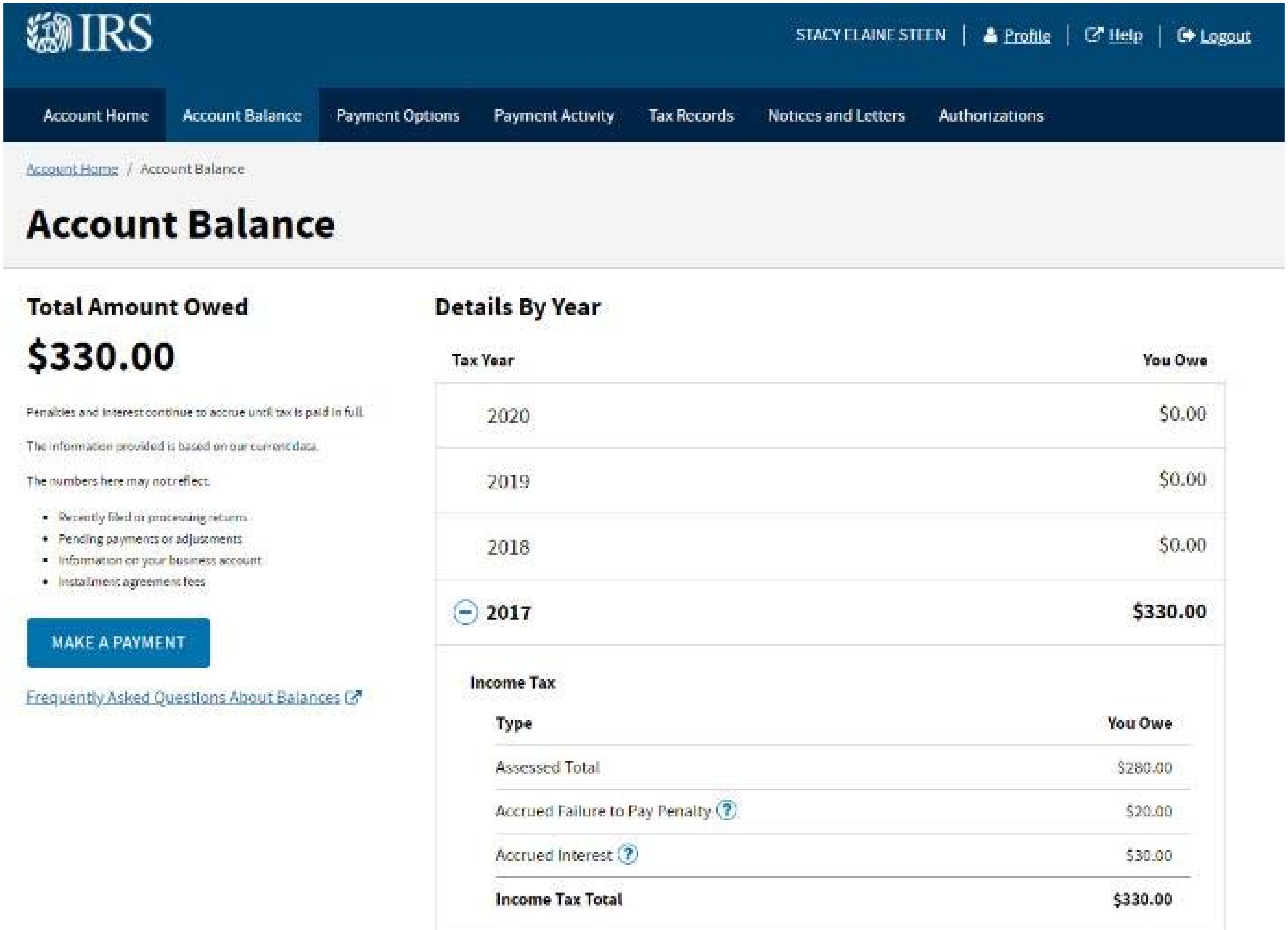
Online Account landing page describes the features and takes you to sign in



Account Home shows key data about the taxpayer's account – cont. 2



Account Balance shows the taxpayers details by year

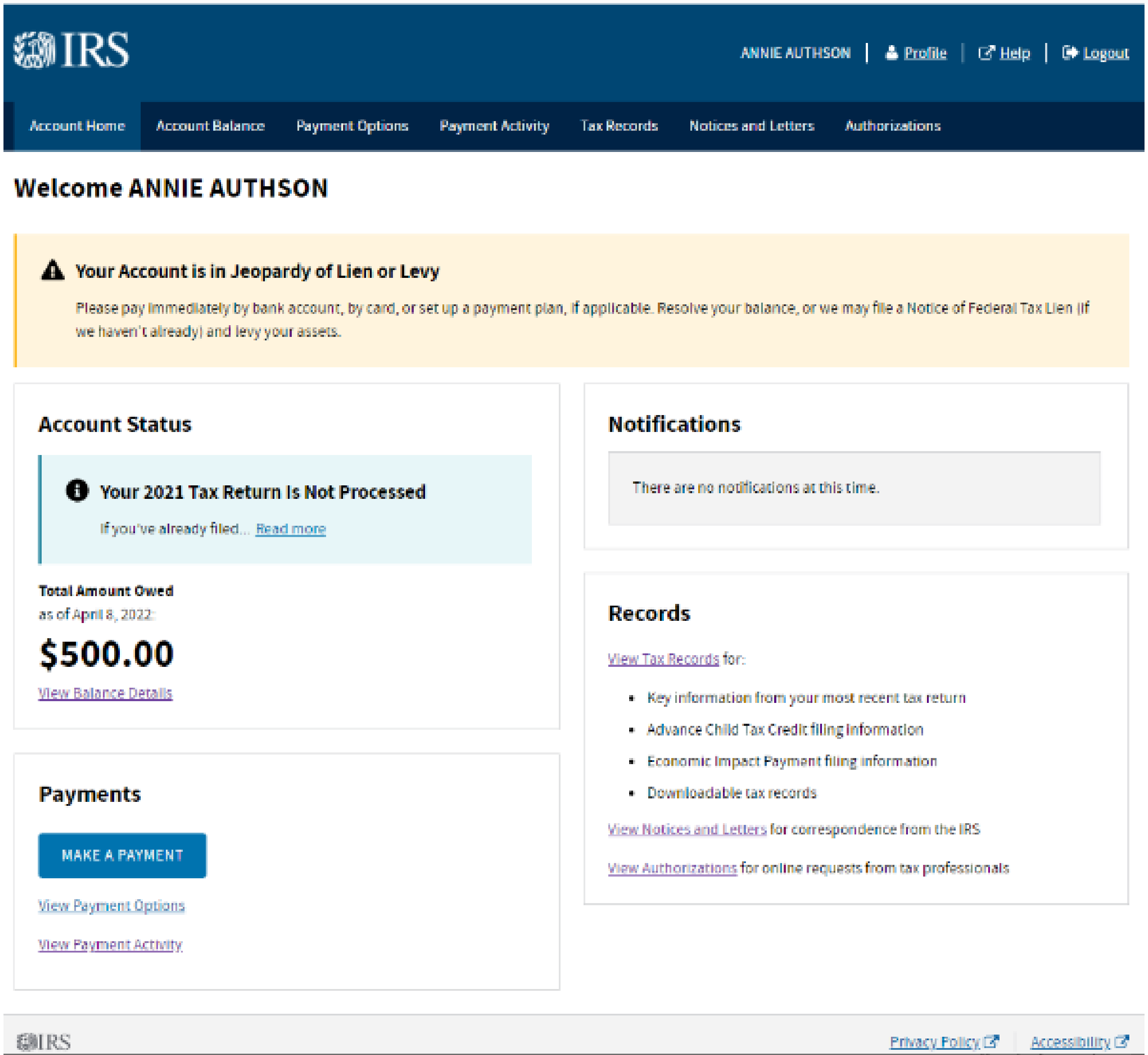


Details by Year

Shows a breakdown of the taxpayer's balance by year, with any penalties and interest.

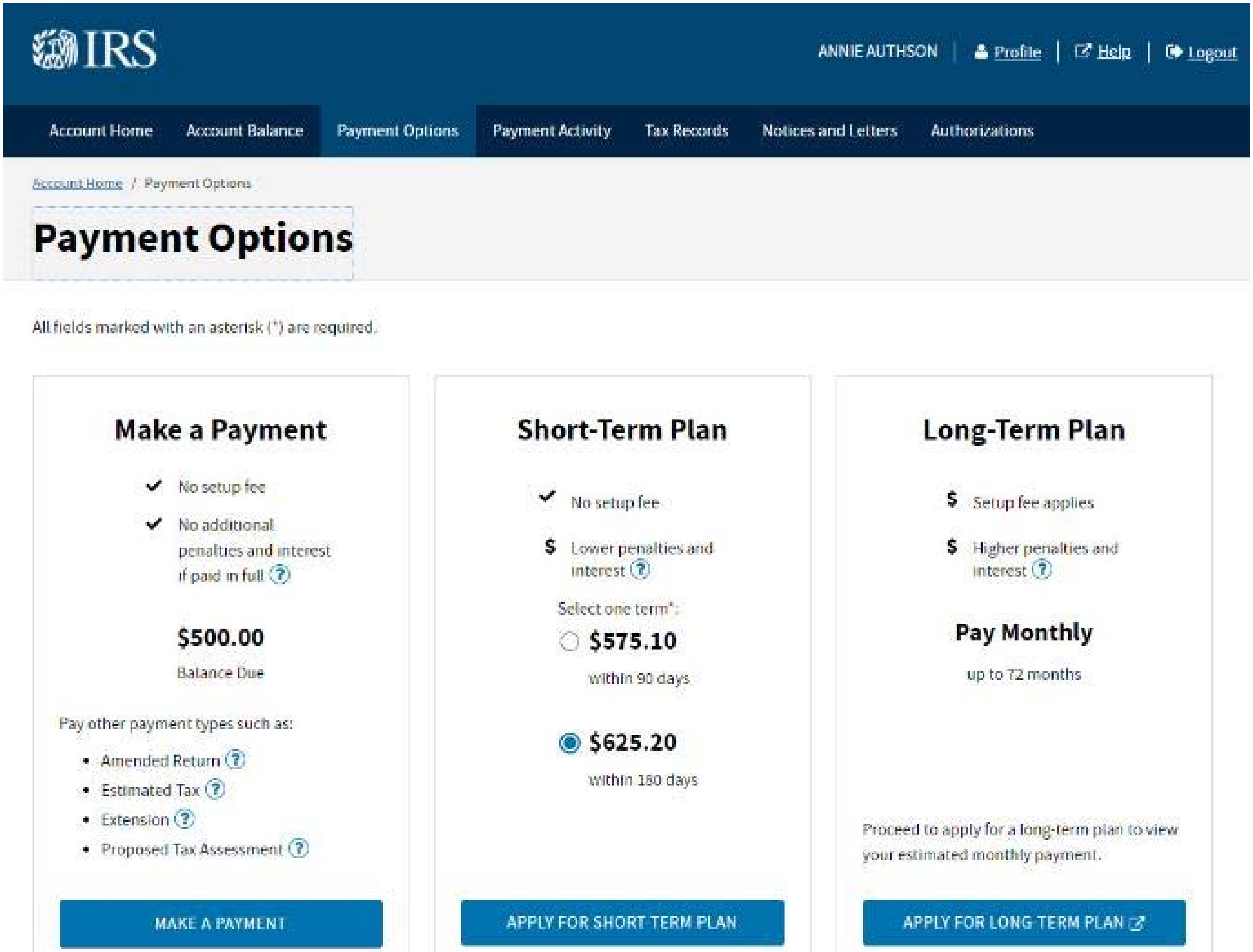
For years for which a return hasn't been filed or a balance isn't available, taxpayers receive a personalized message with account details.

Taxpayers with a balance and no payment plan can see their options



Online Account

Payment Options shows taxpayers all the options available to them



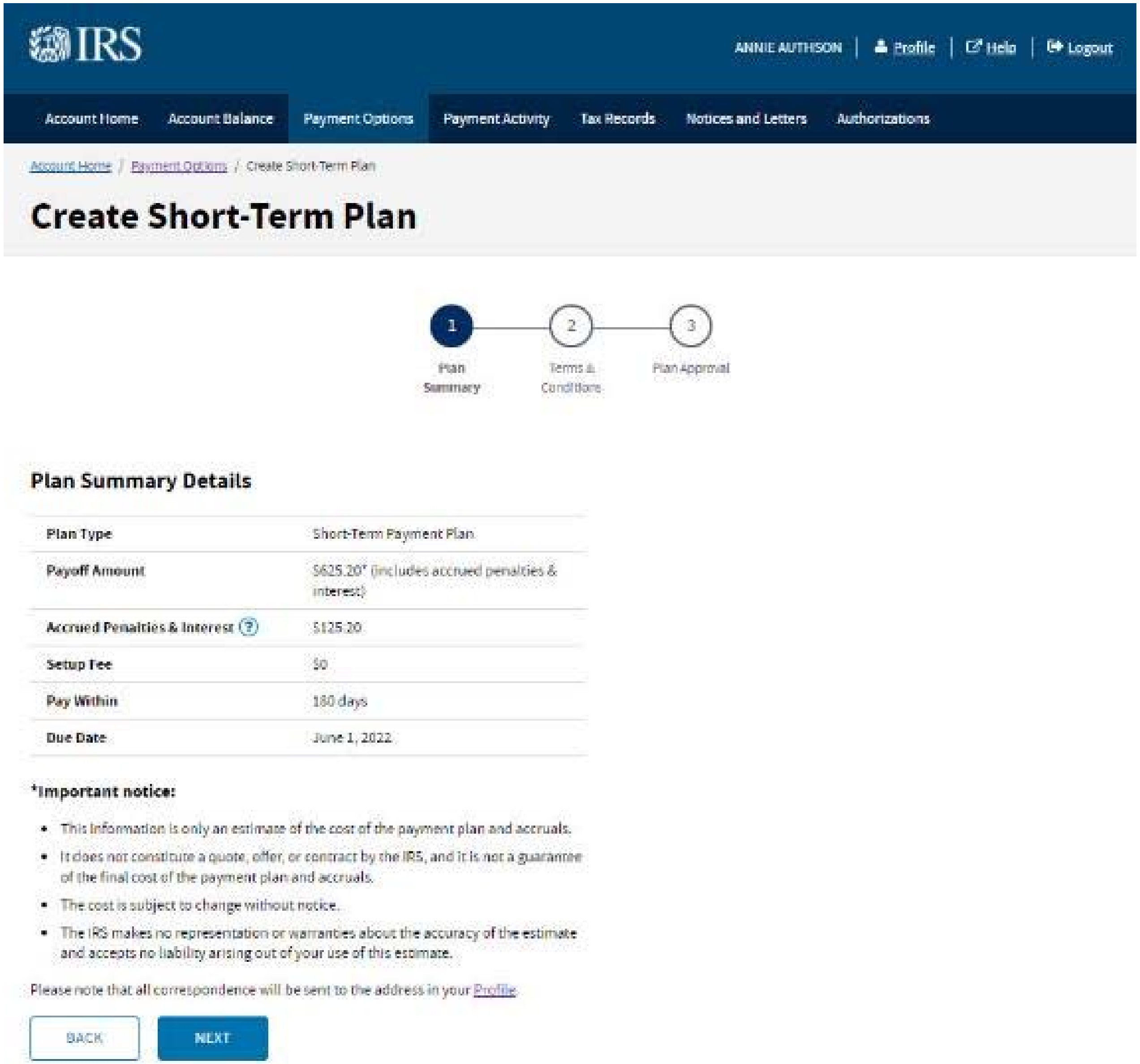
Make a Payment through Online Account

All taxpayers can make same day payments from their bank account for a balance, amended return, estimated tax, filing extension (until the deadline) or a proposed tax assessment.

Payment Plans

Taxpayers can see any payment plan options available to them and set up a plan online if they are eligible.

Eligible taxpayers can create a short-term plan through online account


IRS

ANNIE AUTHSON | Profile | Help | Logout

Account Home | Account Balance | Payment Options | Payment Activity | Tax Records | Notices and Letters | Authorizations

Account Home / Payment Options / Create Short-Term Plan

Create Short-Term Plan

1 Plan Summary — 2 Terms & Conditions — 3 Plan Approval

Plan Summary Details

Plan Type	Short-Term Payment Plan
Payoff Amount	$625.20* (includes accrued penalties & interest)
Accrued Penalties & Interest ?	$125.20
Setup Fee	$0
Pay Within	180 days
Due Date	June 1, 2022

***Important notice:**

- This information is only an estimate of the cost of the payment plan and accruals.
- It does not constitute a quote, offer, or contract by the IRS, and it is not a guarantee of the final cost of the payment plan and accruals.
- The cost is subject to change without notice.
- The IRS makes no representation or warranties about the accuracy of the estimate and accepts no liability arising out of your use of this estimate.

Please note that all correspondence will be sent to the address in your Profile.

BACK NEXT

Online Account

Create a Short-Term Payment Plan

A short-term payment plan gives taxpayers an extension of time to pay their balance.

Taxpayers must accept the terms & conditions

IRS

ANNIE AUTHSON | Profile | Help | Logout

Account Home | Account Balance | Payment Options | Payment Activity | Tax Records | Notices and Letters | Authorizations

Account Home / Payment Options / Create Short-Term Plan

Create Short-Term Plan

Plan Summary — 2 Terms & Conditions — 3 Plan Approval

All fields with an asterisk (*) are required.

Terms and Conditions

If your account is not fully paid by the date promised, we may begin enforced collection actions. We could:

- Collect the entire amount you owe by levying your wages, other income, bank accounts, other assets, or by seizing property.
- Terminate this payment plan at any time if we find that collection of the tax is in jeopardy.
- File a Notice of Federal Tax Lien if one has not been filed previously.

All federal taxes that become due must be filed and paid on time. We will apply any federal tax refund to the amount you owe until your balance is paid in full.

Note: The Internal Revenue Service may have already initiated enforcement actions on your account. If you have received a "Notice of Intent to Levy and Notice of Your Right to a Hearing," it is important that you contact the IRS representative listed on that notice to prevent further enforcement actions.

Accept Terms and Conditions

- [x] I have read the above Terms and Conditions and authorize the creation of a short-term payment plan.*

BACK SUBMIT

Online Account

Taxpayers receive an immediate confirmation of their plan

IRS

ANNIE AUTHSON | Profile | Help | Logout

Account Home | Account Balance | Payment Options | Payment Activity | Tax Records | Notices and Letters | Authorizations

Account Home / Payment Options / Create Short-Term Plan

Create Short-Term Plan

Plan Summary — Terms & Conditions — 3 Plan Approval

Plan Approval

You are approved for a short-term payment plan!

Your short-term payment plan is active effective immediately. You may make multiple payments or pay the liability in full by the due date. All correspondence will be sent to the address in your Profile.

Plan Summary Details

Name	ANNIE AUTHSON
Plan Type	Short-Term Payment Plan
Payoff Amount	$625.20* (includes accrued penalties & interest)
Accrued Penalties & Interest ?	$125.20
Setup Fee	$0
Pay Within	180 days
Due Date	June 1, 2022

***Important notice:**

- This information is only an estimate of the cost of the payment plan and accruals.
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- The cost is subject to change without notice.
- The IRS makes no representation or warranties about the accuracy of the estimate and accepts no liability arising out of your use of this estimate.

Start Paying Today

Making a payment today minimizes penalties and interest. If you choose to make partial payments, check your online account for an updated payoff amount.

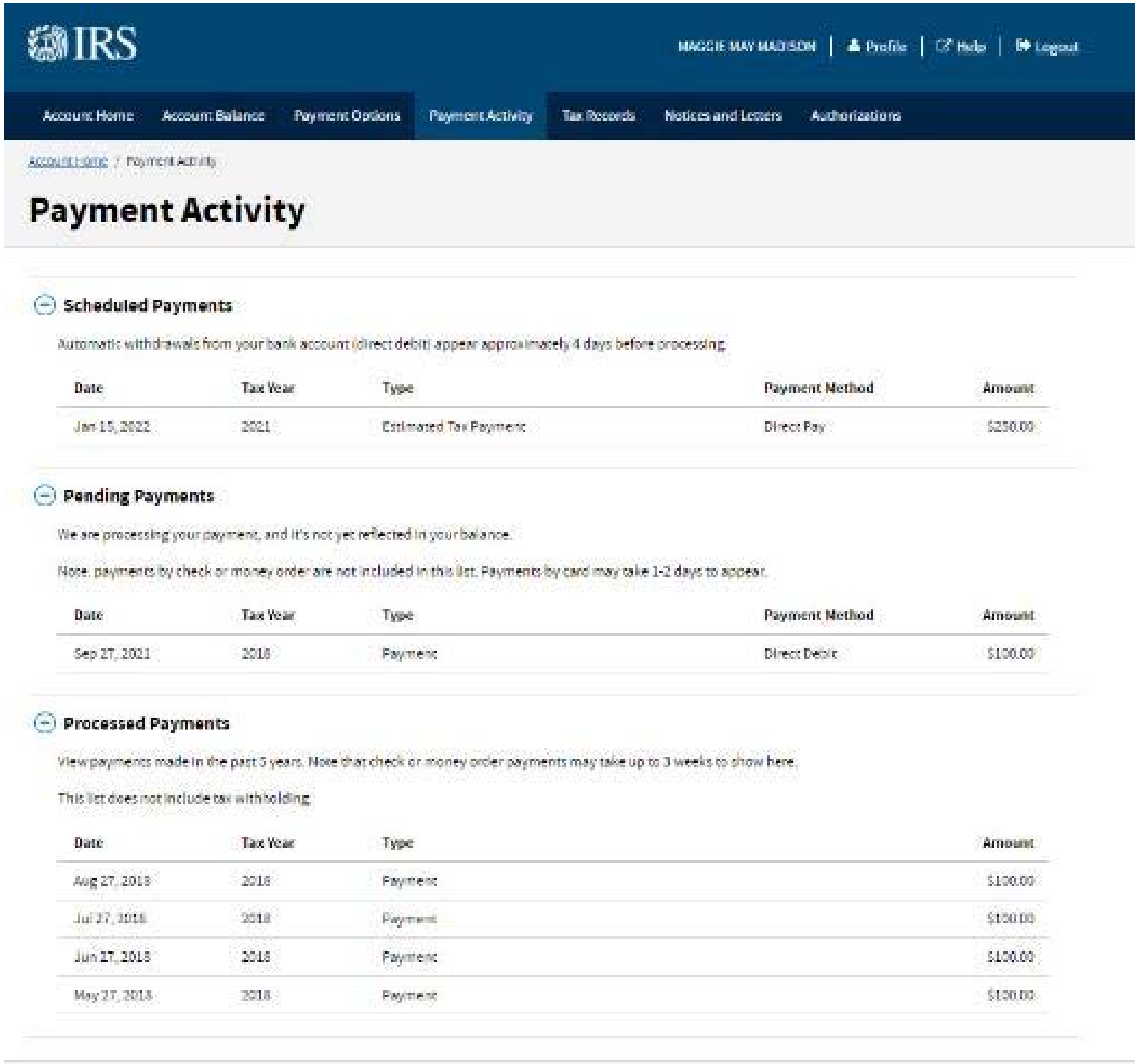
MAKE A PAYMENT

Avoid Future Tax Balances

- Use the Tax Withholding Estimator to ensure you have the appropriate amount of tax withheld per paycheck
- More information on making Estimated Tax Payments throughout the year

Online Account

Taxpayers can see any pending or scheduled payments


IRS MAGGIE MAY MADISON | Profile | Help | Logout

Account Home | Account Balance | Payment Options | Payment Activity | Tax Records | Notices and Letters | Authorizations

Account Home / Payment Activity

Payment Activity

Scheduled Payments

Automatic withdrawals from your bank account (direct debit) appear approximately 4 days before processing.

Date	Tax Year	Type	Payment Method	Amount
Jan 15, 2022	2021	Estimated Tax Payment	Direct Pay	$250.00

Pending Payments

We are processing your payment, and it's not yet reflected in your balance.

Note: payments by check or money order are not included in this list. Payments by card may take 1-2 days to appear.

Date	Tax Year	Type	Payment Method	Amount
Sep 27, 2021	2018	Payment	Direct Debit	$100.00

Processed Payments

View payments made in the past 5 years. Note that check or money order payments may take up to 3 weeks to show here.

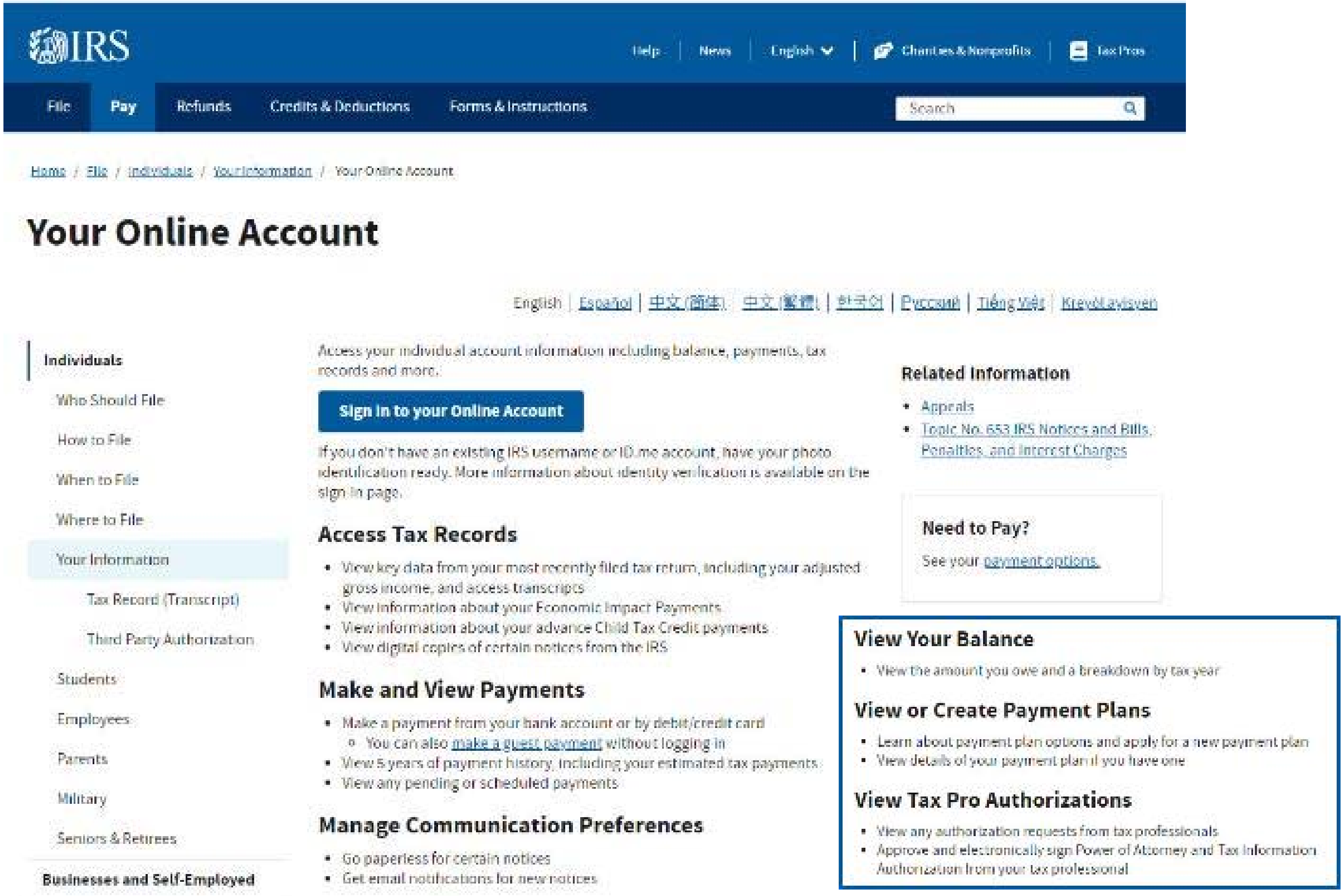
This list does not include tax withholding.

Date	Tax Year	Type	Amount
Aug 27, 2018	2018	Payment	$100.00
Jul 27, 2018	2018	Payment	$100.00
Jun 27, 2018	2018	Payment	$100.00
May 27, 2018	2018	Payment	$100.00

Pending & Scheduled Payments
Taxpayers can see all pending or scheduled electronic payments. After submitting a payment through online account, it will show up right away as pending.

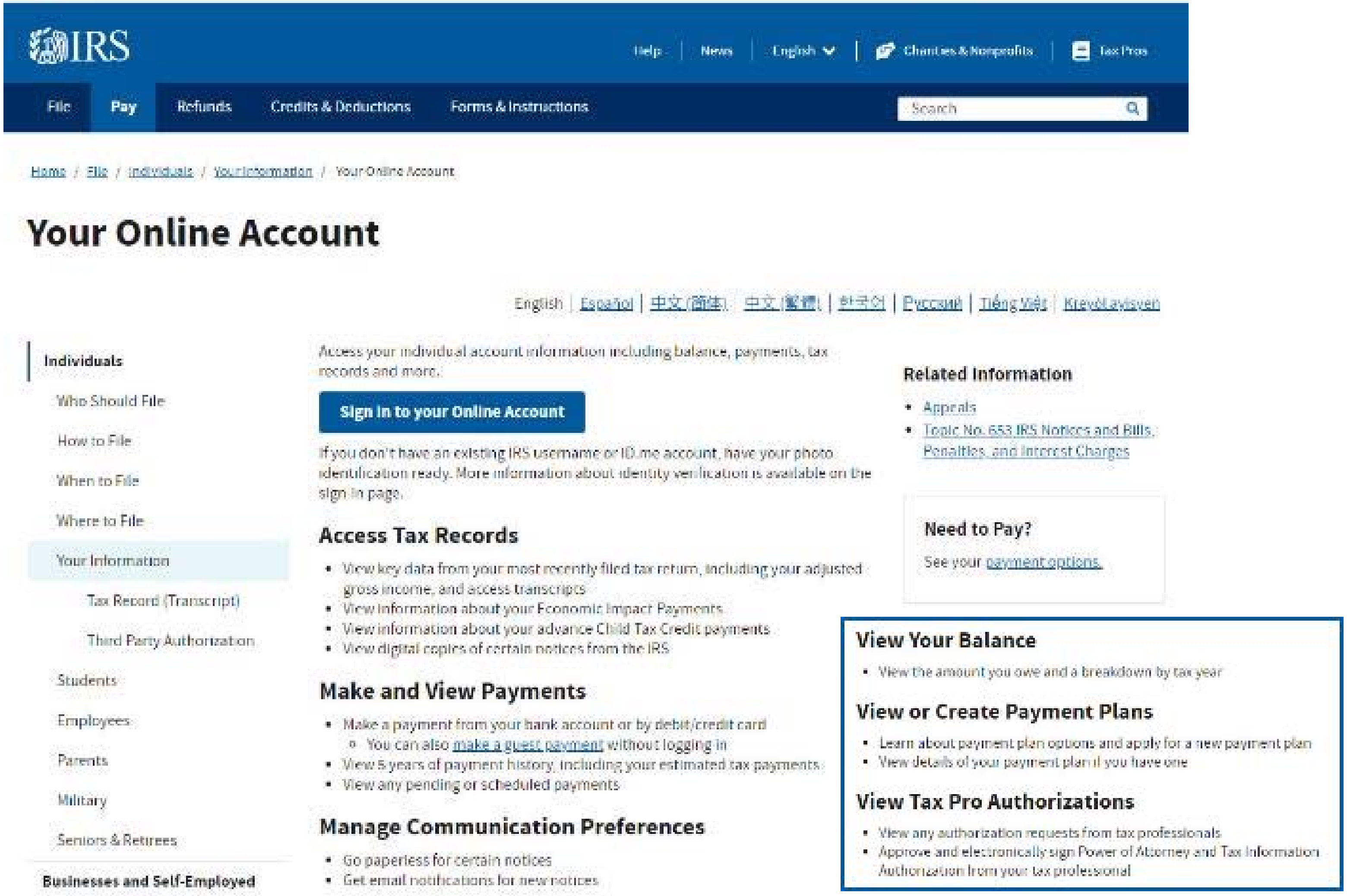
Processed Payments
Taxpayers can see five years of payment history. Estimated tax payments note that as the type.

Notices and Letters provides digital copies of select IRS correspondence – cont.



Online Account

Notices and Letters provides digital copies of select IRS correspondence – cont. 2



IRS

Help | News | English | Charities & Nonprofits | Tax Pros

File | Pay | Refunds | Credits & Deductions | Forms & Instructions | Search

Home / File / Individuals / Your Information / Your Online Account

Your Online Account

English | Español | 中文 (简体) | 中文 (繁體) | 한국어 | Русский | Tiếng Việt | Kreyòl ayisyen

- Individuals
  - Who Should File
  - How to File
  - When to File
  - Where to File
  - Your Information
    - Tax Record (Transcript)
    - Third Party Authorization
  - Students
  - Employees
  - Parents
  - Military
  - Seniors & Retirees
- Businesses and Self-Employed

Access your individual account information including balance, payments, tax records and more.

Sign in to your Online Account

If you don't have an existing IRS username or ID.me account, have your photo identification ready. More information about identity verification is available on the sign in page.

Access Tax Records

- View key data from your most recently filed tax return, including your adjusted gross income, and access transcripts
- View information about your Economic Impact Payments
- View information about your advance Child Tax Credit payments
- View digital copies of certain notices from the IRS

Make and View Payments

- Make a payment from your bank account or by debit/credit card
  - You can also make a guest payment without logging in
- View 5 years of payment history, including your estimated tax payments
- View any pending or scheduled payments

Manage Communication Preferences

- Go paperless for certain notices
- Get email notifications for new notices

Related Information

- Appeals
- Topic No. 653 IRS Notices and Bills, Penalties, and Interest Charges

Need to Pay?

See your payment options.

View Your Balance

- View the amount you owe and a breakdown by tax year

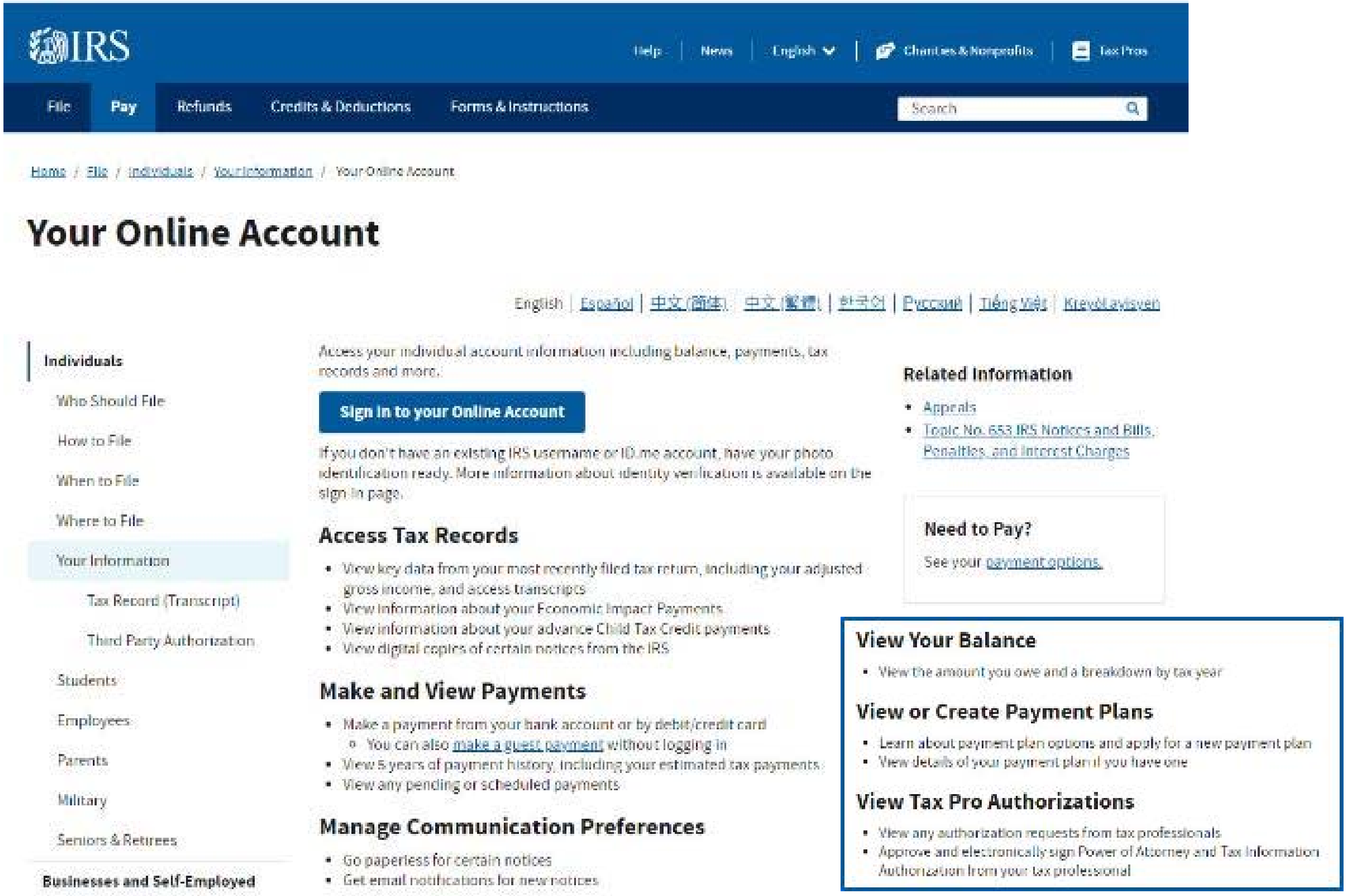
View or Create Payment Plans

- Learn about payment plan options and apply for a new payment plan
- View details of your payment plan if you have one

View Tax Pro Authorizations

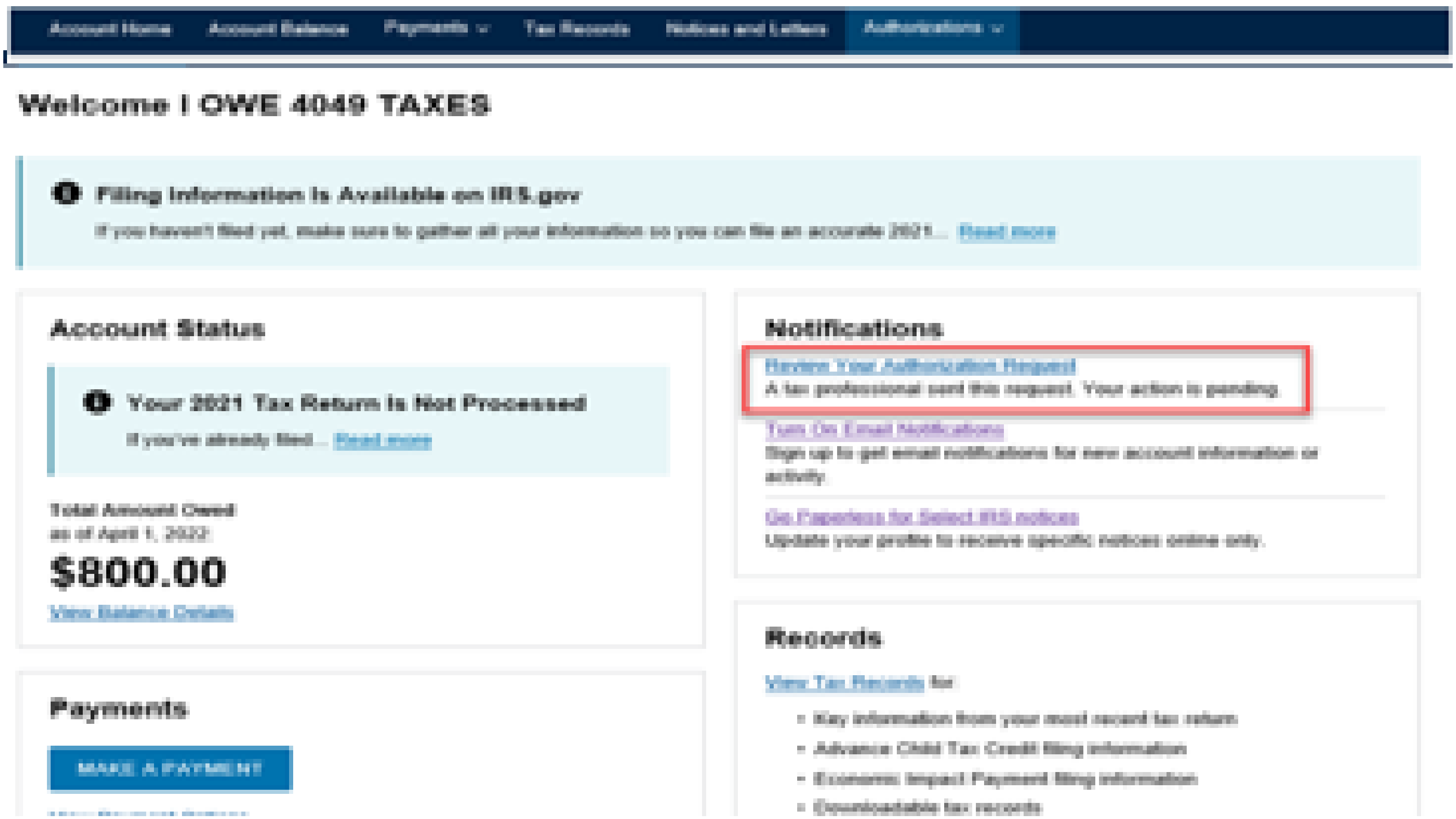
- View any authorization requests from tax professionals
- Approve and electronically sign Power of Attorney and Tax Information Authorization from your tax professional

Notices and Letters provides digital copies of select IRS correspondence – cont. 3



View Tax Pro Authorizations

Notional



Authorizations

You can authorize a third party to help you with your federal tax matters. There are 2 types of authorizations:

- Power of Attorney – Authorize an individual to represent you in tax matters before the IRS and to review or receive your confidential tax information for the tax matters and years you specify.
- Tax Information Authorization – Designate an individual, corporation, firm, organization or partnership to receive your confidential tax information for the tax matters and years you specify.

You still must meet your tax obligations when you authorize someone to represent you.

More about third-party authorizations

Online Authorization Requests

View authorization requests submitted online from tax professionals. If you have questions about a request, contact the tax professional. Print using your browser's Print function.

Tax Professional	Date Requested	Status	Actions
Doe, John	09/02/2021	Pending	Approve/Reject
Doe, John	09/02/2021	Pending	Approve/Reject
Maxxtaxx, Taxi	06/25/2021	Processing	View
Maxxtaxx, Taxi	06/25/2021	Failed	View
Doe, John	06/25/2021	Rejected	View
Doe, John	06/25/2021	Approved	View

Taxpayer Reviews POA Request

Notional

Authorizations

Review Request for Power of Attorney

John Doe requested authorization to represent you before the IRS for the tax matters listed below.

The tax professional requested this authorization, not the IRS.

Your approval of this request will authorize the tax professional to receive your confidential information and represent you before the IRS for the tax matters and time period listed.

Reject the request if:

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

Carefully review the request to make sure it is accurate. If you have questions, contact the tax professional.

If you want to **approve**, you must **check the boxes** under Sign and Submit.

Request for Power of Attorney (POA)

Your Information	
Name	Billy Baker
Address	1000 Fountain Ave, Paris, GA, 38810

Taxpayer Reviews POA Request – Reject Request *Notional*

Representative Information

Name	John Doe
CAF Number ?	1234512345
Address	1111 Kings Ln, Danville, VA, 24541
Declaration of Representative	The representative signed that they are an Attorney who is not suspended or disbarred from practice before the IRS.
Signed by Representative	June 25, 2021

Tax Matters

Tax Matter	Form 1040 Income Tax
Tax Period(s)	2019 - 2019
Notices	The representative will not receive by mail copies of notices and communications the IRS sends you for these tax matters.

Sign and Submit

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

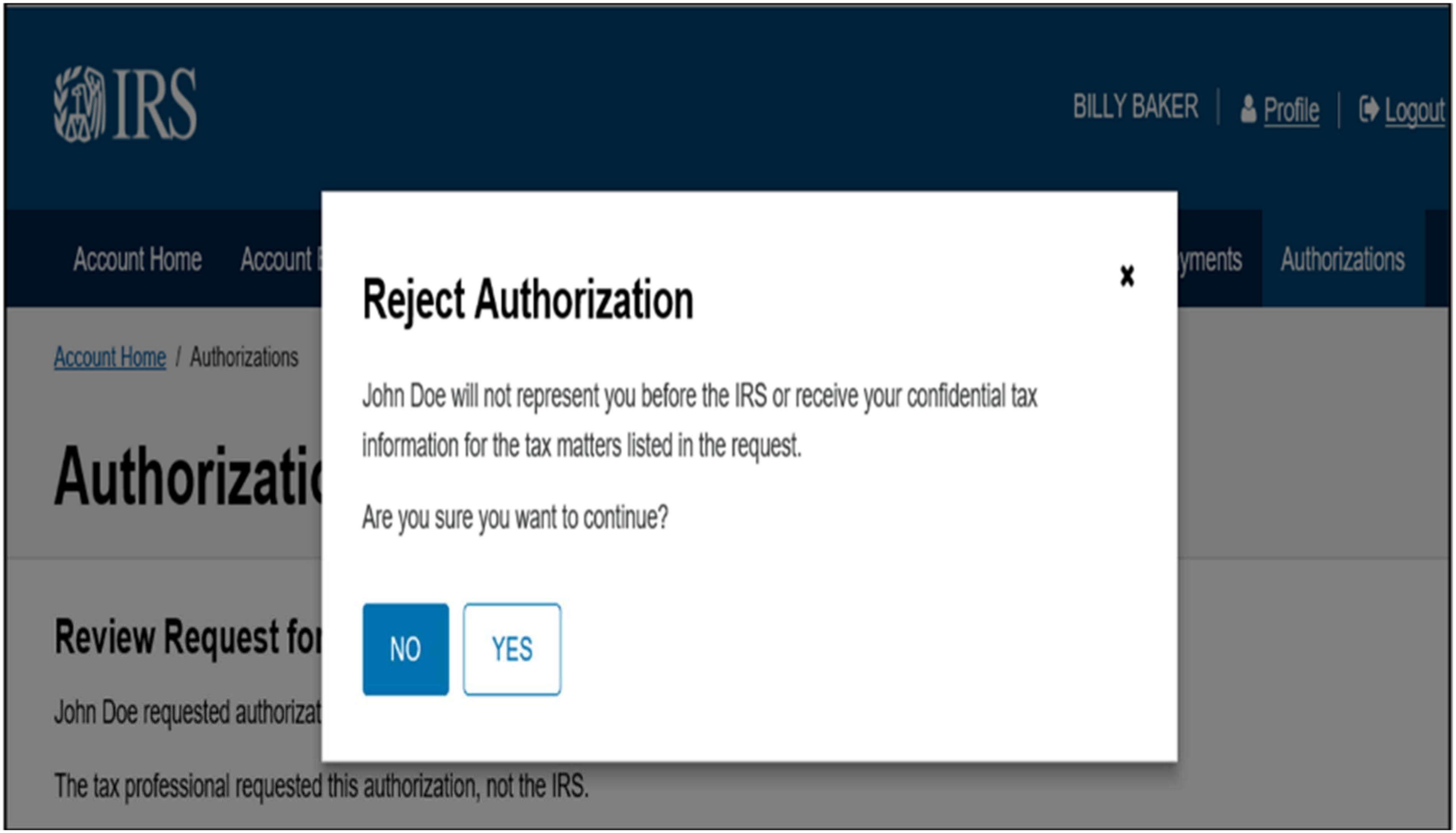
- [ ] By checking this box, I authorize the designated representative to represent me before the IRS and receive confidential information for the matters described in this power of attorney.
- [ ] By checking this box, under penalties of perjury, I declare that, to the best of my knowledge and belief,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

REJECT REQUEST | APPROVE REQUEST

Back to Authorizations

Reject Authorization Pop Up

Notional



Confirmation of Rejected POA

Notional

Authorizations

Power of Attorney Request Rejected

Request Rejected

You have rejected the request for power of attorney from John Doe. Contact them if you have any questions.

Your Information

Name	Billy Baker
Address	1000 Fountain Ave, Parise, GA, 38810

Representative Information

Name	John Doe
CAF Number ?	1234-12345
Address	1111 Kings Ln, Danville, VA, 24541

Tax Matters

Tax Matter	Form 1040 Income Tax
Tax Period(s)	2019 - 2019

Back to Authorizations

Taxpayer Reviews POA Request – Approve Request

Notional

Representative Information

Name	John Doe
CAF Number ?	123412345
Address	1111 Kings Ln, Danville, VA, 24541
Declaration of Representative	The representative signed that they are an Attorney who is not suspended or disbarred from practice before the IRS.
Signed by Representative	June 25, 2021

Tax Matters

Tax Matter	Form 1040 Income Tax
Tax Period(s)	2019 - 2019
Notices	The representative will not receive by mail copies of notices and communications the IRS sends you for these tax matters.

Sign and Submit

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

- [x] By checking this box, I authorize the designated representative to represent me before the IRS and receive confidential information for the matters described in this power of attorney.
- [x] By checking this box, 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

Back to Authorizations

Approve Request - Confirmation of Authorization Processing

Notional

Power of Attorney Request Processing

Your Request is Processing

Please allow up to 2 business days to process your request. We will update the status on the authorizations page when processed.

Your Information

Name	Billy Baker
Address	1000 Fountain Ave, Paris, GA, 38810

Representative Information

Name	John Doe
CAF Number ?	123412345
Address	1111 Kings Ln, Danville, VA, 24541
Declaration of Representative	
Signed by Representative	June 25, 2021

Tax Matters

Tax Matter	Form 1040 Income Tax
Tax Period(s)	2019 - 2019
Notices	The representative will receive by mail copies of notices and communications the IRS sends you for these tax matters.

Electronic Signature

Signed By Taxpayer	June 23, 2021

Taxpayer Approval of POA Request

Notional

Account Home | Account Balance | Payments | Tax Records | Notices and Letters | Authorizations

Account Home / Authorizations

Authorizations

Power of Attorney Approved

Request Approved

John Doe is authorized to represent you before the IRS and receive your confidential tax information for the matters described in this power of attorney.

Taxpayer Information

Taxpayer Identification Number	754-43-7563
Name	Billy Baker
Address	1000 Fountain Ave, Parise, GA, 38810

Representative Information

CAF Number	1234-12345
Name	John Doe
Address	1111 Kings Ln, Danville, VA, 24541

Tax Matters

Tax Matter	Form 1040 Income Tax
Tax Period(s)	2019 - 2019

Profile displays key taxpayer contact information

IRS

Help | News | English | Charities & Nonprofits | Tax Pros

File | Pay | Refunds | Credits & Deductions | Forms & Instructions | Search

Home / File / Individuals / Your Information / Your Online Account

Your Online Account

English | Español | 中文 (简体) | 中文 (繁體) | 한국어 | Русский | Tiếng Việt | Kreyòl ayisyen

Individuals
- Who Should File
- How to File
- When to File
- Where to File
- Your Information
  - Tax Record (Transcript)
  - Third Party Authorization
- Students
- Employees
- Parents
- Military
- Seniors & Retirees

Businesses and Self-Employed

Access your individual account information including balance, payments, tax records and more.

Sign in to your Online Account

If you don't have an existing IRS username or ID.me account, have your photo identification ready. More information about identity verification is available on the sign in page.

Access Tax Records

- View key data from your most recently filed tax return, including your adjusted gross income, and access transcripts
- View information about your Economic Impact Payments
- View information about your advance Child Tax Credit payments
- View digital copies of certain notices from the IRS

Make and View Payments

- Make a payment from your bank account or by debit/credit card
  - You can also make a guest payment without logging in
- View 5 years of payment history, including your estimated tax payments
- View any pending or scheduled payments

Manage Communication Preferences

- Go paperless for certain notices
- Get email notifications for new notices

Related Information

- Appeals
- Topic No. 653 IRS Notices and Bills, Penalties, and Interest Charges

Need to Pay?

See your payment options.

View Your Balance

- View the amount you owe and a breakdown by tax year

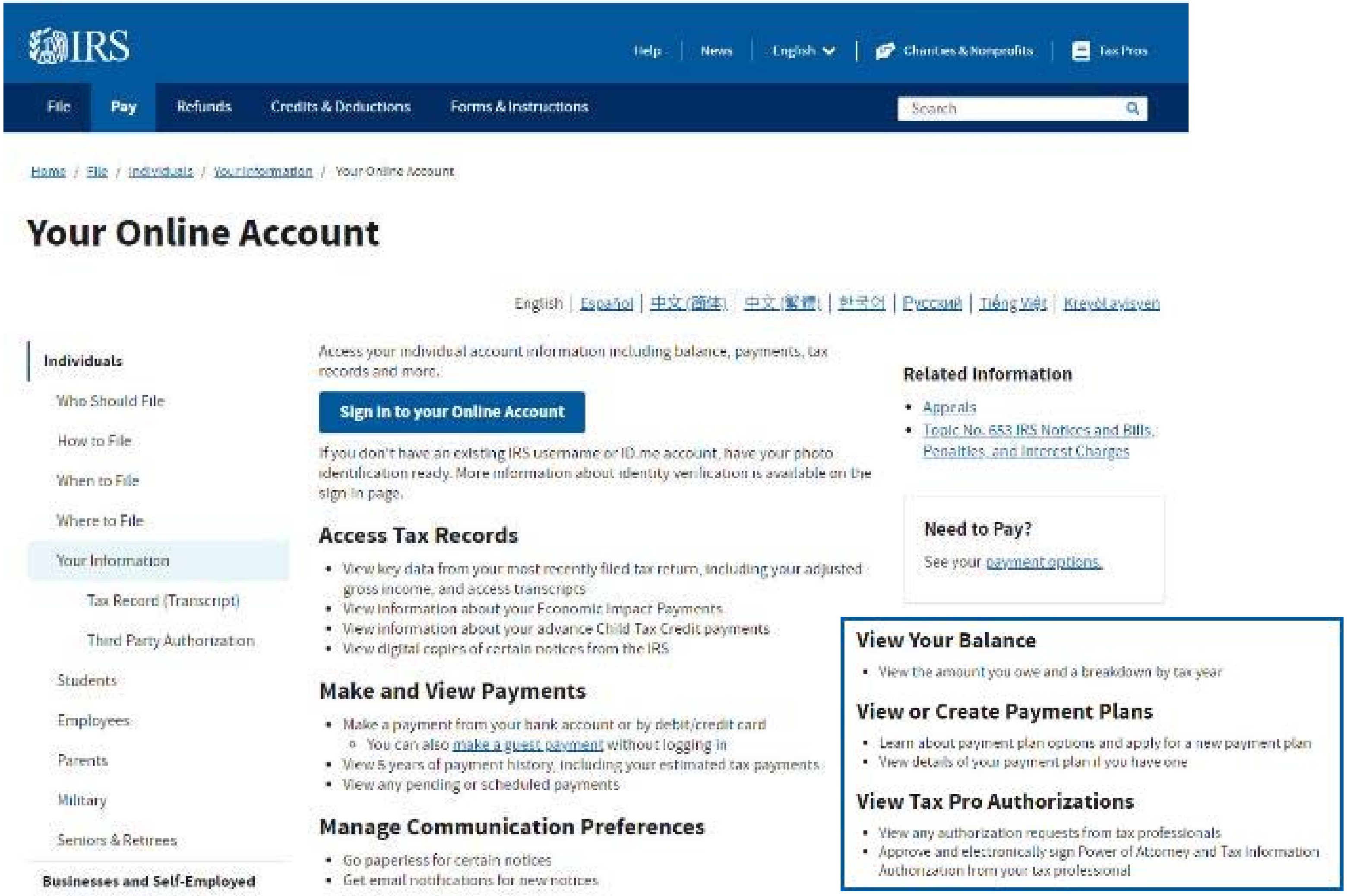
View or Create Payment Plans

- Learn about payment plan options and apply for a new payment plan
- View details of your payment plan if you have one

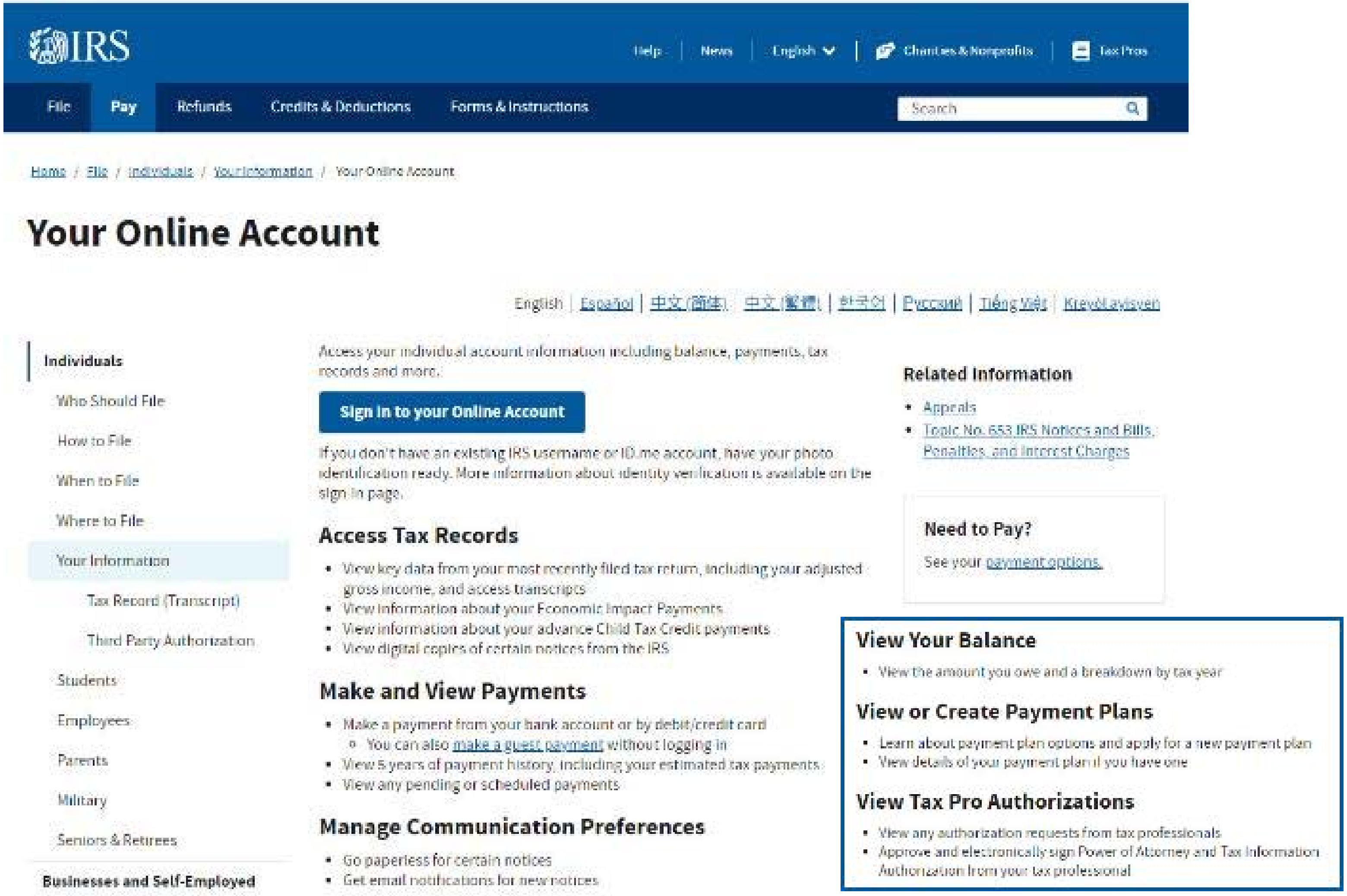
View Tax Pro Authorizations

- View any authorization requests from tax professionals
- Approve and electronically sign Power of Attorney and Tax Information Authorization from your tax professional

Profile displays key taxpayer contact information – cont.



Email Notification Preferences on Profile



IRS

Help | News | English | Charities & Nonprofits | Tax Pros

File | Pay | Refunds | Credits & Deductions | Forms & Instructions | Search

Home / File / Individuals / Your Information / Your Online Account

Your Online Account

English | Español | 中文 (简体) | 中文 (繁體) | 한국어 | Русский | Tiếng Việt | Kreyòl ayisyen

- Individuals
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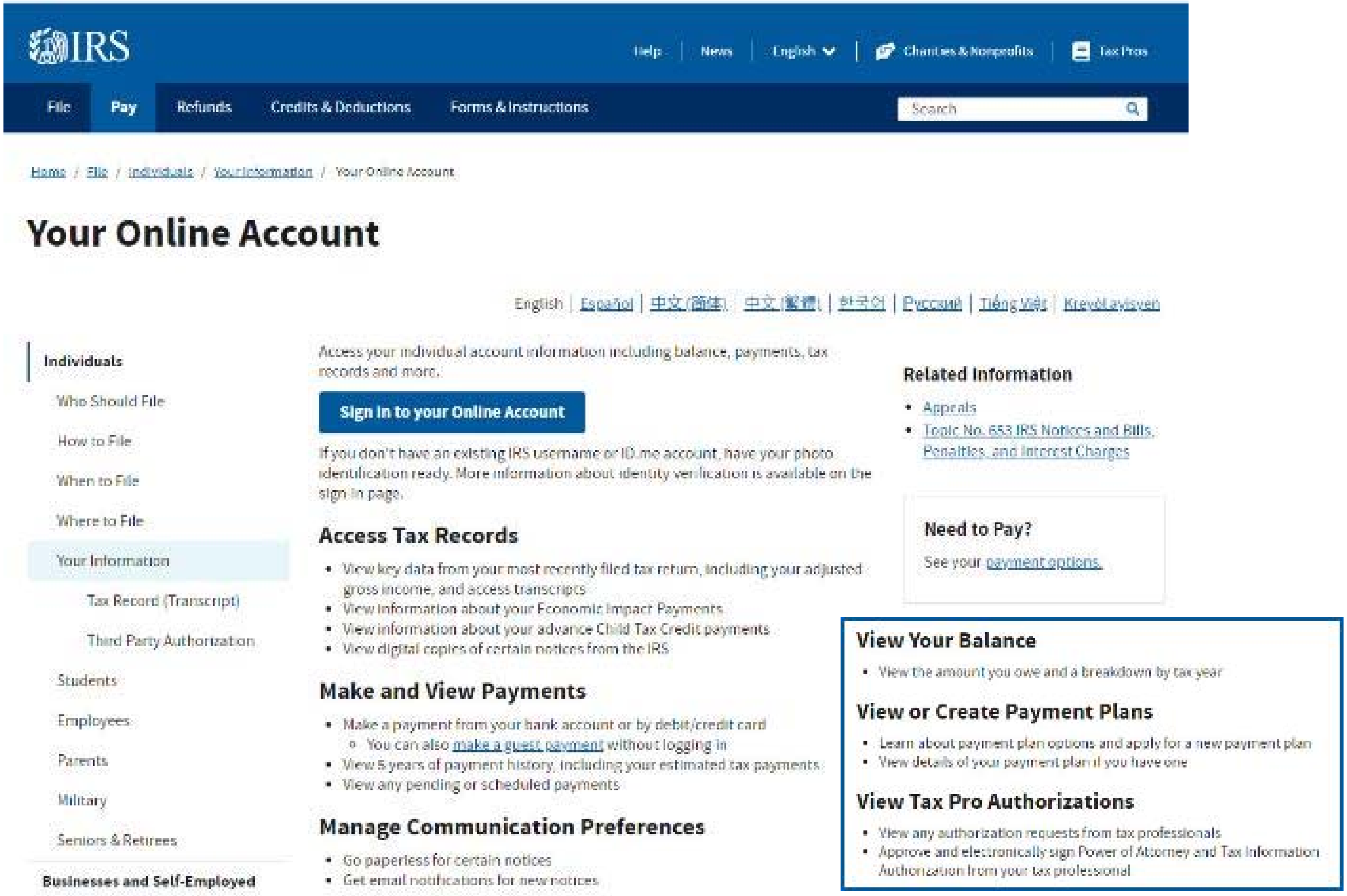
Paperless Preferences on Profile



Additional features are available now

Now available

Tax Pro Authorizations

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

Create a Short-Term Payment Plan

Certain taxpayers can setup short term payment plans within online account.

Manage Notification Preferences

Request email notifications for digital notices or payments.

Opt-out of Paper Notices

Go paperless for certain correspondence from the IRS.

Make a Payment

Pay your balance or estimated taxes seamlessly within Online Account.

Key Points

- View Balance, Tax Records and Notices
- Make and View Payments
- View Payment Plan Details
- View Account Notifications
- View Address on File

Key Points – cont. 1

- Make a same day payment
- Set up payment plan if eligible
- View Economic Impact Payments, if any
- View & Approve Authorizations
- View digital copies of select notices from the IRS

Key Points – cont. 2

- Opt out of Paper Notices
- Opt into email notifications for digital copies of new notices

IRS Business Tax Account

Publication 5904
IRS Business Tax Account

Sole proprietors

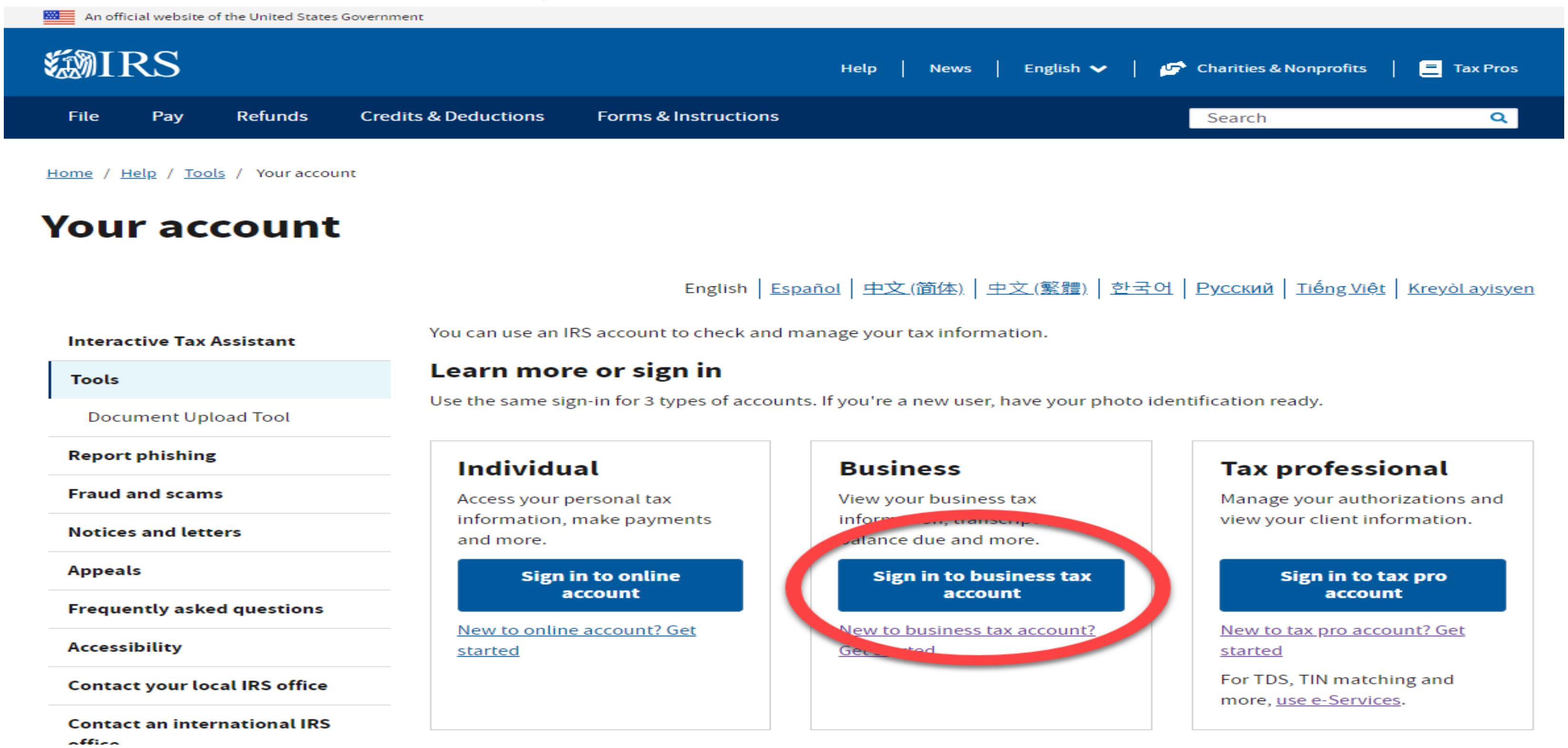
- View business information on file
- Manage business users
- View balance due
- Make same-day and scheduled payments
- View payment history
- View tax account transcripts
- View tax compliance report
- View tax certificate for award use
- Notices and letters
- Registration for clean energy credits (if eligible)

Partnerships and S corporations

- View business information on file
- View balance due
- Make same-day and scheduled payments
- View payment history

How to Access Business Tax Account

IRS.gov/businessaccount



Who can Use Business Tax Account

Who can use this

You can use a business tax account if you have this type of business:

Sole proprietor: If you're a sole proprietor who files business tax returns with an employer identification number (EIN).

Note: A limited liability company (LLC) that reports business income on Form 1040 Schedule C can't use a business tax account at this time.

Partnership or S corporation: If you're an individual partner or individual shareholder, you can access a business account if you have **both**:

•A Social Security number or an individual tax ID number (ITIN)

•A Schedule K-1 on file (for partners, from 2012-2022; for shareholders, from 2006-2022)

Business Tax Account Services

Sole proprietorship with an EIN:	Individual partner or shareholder:
You can access these features: ***Profile*** View business information on file Manage business users ***Account balance and payments*** View balance due Make same-day and scheduled payments View payment history ***Tax records*** View tax transcripts View tax compliance report View tax certificate for award use ***Other features*** Notices and letters Registration for clean energy credits (if eligible)	If you're an individual partner or shareholder, you can access these features for the tax years when you received a Schedule K-1 (more tax years coming soon): ***Profile*** View limited business information on file ***Account balance and payments*** View balance due Make same-day and scheduled payments View payment history

Business Tax Account – Future improvements

- IRS News Release 2024-196 (July. 25, 2024)

…With the latest expansion, **Business Tax Account** is now available in Spanish. In addition, eligible business taxpayers can see their balance due and make the payment all in one place. Previously, the balance due had to be viewed in a separate place from where the payment was made, adding another complicating step for businesses making payments. Sole proprietors can now download business entity transcripts from their Business Tax Account. This transcript shows entity information like business name, address, location address and more for the Employer Identification Number on file…

The Identity Protection PIN (IP PIN)

Proactively protect your federal tax account from ID theft

What is the IP PIN?

- An Identity Protection PIN (IP PIN), is a six-digit number that prevents someone else from filing a tax return using your Social Security number or Individual Taxpayer Identification Number
- The IP PIN helps the IRS to verify your identity when you file your electronic or paper tax return
- Even though you may not have a filing requirement, an **IP PIN still protects your account from fraudulent filings**
- An electronically filed return filed without your IP PIN, or an incorrect IP PIN, will reject, including your return and any fraudulent returns using your Social Security Number.
- Any paper returns filed without your correct IP PIN will undergo additional scrutiny and any fraudulent returns will be removed from your account. If the return verifies to be yours, we will continue to process it.

Who can participate in the IP PIN Program?

- Anyone who has a Social Security number (SSN) or Individual Taxpayer Identification Number (ITIN) and can verify his/her identity is eligible to enroll into the IP PIN program (Voluntary Enrollment)

- Victims of federal tax related identity theft are automatically enrolled into the IP PIN program (Automatic Enrollment)

How can a taxpayer voluntarily enroll into the IP PIN Program?

Get An Identity Protection PIN (IP PIN) Online Application

- Fastest and most secure method to enroll
- Protection begins right after enrollment
- IP PIN is immediately available for filing

Form 15227, Application for an IP PIN

- For taxpayers who cannot verify their identity through the Online Application
- Process can take up to 180 days to complete enrollment
- Taxpayer must include a telephone number for call back verification
- Limited to taxpayers under a certain adjusted gross income level

In-Person Meeting at a local Taxpayer Assistance Office, (TAC)

- For taxpayers who cannot verify their identity through the Online Application or the Form 15227 process or are ineligible to file a Form 15227
- Appointments may be limited due to availability

Get An Identity Protection PIN (IP PIN) Online Application

- Fastest and most secure way to enroll into the program
- IP PIN is displayed online after verification, and it can be retrieved at anytime by logging back into the application
- Located on IRS.gov at www.irs.gov/ippin
- The IP PIN online application is generally available starting in mid-January through mid-November
- Taxpayers who have an existing IRS Online Account may be able to use their log in information to access the Get An IP PIN Application
- Some taxpayers with an existing IRS Online Account may have to revalidate their identity through a Credentialling Service Provider
- Taxpayers without an existing IRS Online Account will have to validate their identity through a Credentialling Service Provider

How does a Taxpayer receive their IP PIN?

- Each December, new IP PINs are generated for the upcoming filing season for current enrollees

- CP 01A notices containing the new IP PIN are mailed from mid-December to mid-January

- The following taxpayers will receive a CP 01A notice each year:
    - Form 15227 applicants
    - In-person TAC applicants
    - Identity theft victims who did not enroll online after January 2019
        - (If a valid address cannot be confirmed then the CP 01A notice is suppressed)*
    - Taxpayers who enrolled online prior to January 2019

- Taxpayers who enrolled voluntarily online after January 2019, must log back into the Get an IP PIN application to retrieve their current IP PIN (These taxpayers will not receive a CP 01A notice)

- The Get an IP PIN application is available from late January to mid-November

How to use the IP PIN when filing

E-filed Return

- Your tax software or practitioner will tell you where to enter the IP PIN. If you can't find where to enter your IP PIN, search within your software for Identity Protection PIN or IP PIN or contact the software provider's help desk

- Each taxpayer claimed on a tax return who receives an IP PIN must have their IP PIN(s) entered on the tax return. This includes the IP PIN of any dependent(s) included in the tax return

- If a dependent has an IP PIN, it must be entered on the 'Form 1040 series' as well as 'Form 2441' and 'Schedule Earned Income Tax Credit'

Paper Return

- Enter your IP PIN(s) as applicable in the boxes marked "Identity Protection PIN" in signature area of the tax return

- Each taxpayer who has an IP PIN must enter it on their tax return

- You don't need to enter an IP PIN for your dependent(s) when filing a paper tax return

What if a Taxpayer Lost or Doesn't Receive an IP PIN Notice?

Taxpayers may receive their current year IP PIN by:

- **Accessing the Get An IP PIN Application** (Fastest Method)
  - Retrieve their IP PIN by logging into their account on IRS.gov
  - If the taxpayer does not have an account, they can create an account and retrieve their IP PIN
- **Calling the IRS help line at 800-908-4490**
  - Taxpayer will need to verify their identity and current mailing address
  - After verification is completed, a 4869C notice containing their IP PIN will be mailed to the taxpayer within 21 days

Note: If the taxpayer cannot obtain their IP PIN through either option, then the best alternative is to file a paper return without their IP PIN.

Important Reminders about the IP PIN

- IP PIN protects your federal tax account from Identity Theft
- An IP PIN is valid for one calendar year, each year a new IP PIN is generated for your account
- An IP PIN must be used when filing any federal tax returns during the year including prior year returns
- **Never share your IP PIN with anyone** other than your tax preparer at the time of filing
- If unable to enroll online there are alternatives
  - Form 15227, Application for an IP PIN
  - In-Person Meeting at a local Taxpayer Assistance Office, (TAC)
- IP PIN participants must keep their address current including dependents
  - By filing Form 8822, Change of Address

IP PIN Issues when filing electronically

- IP PIN was not entered, entered incorrectly or a prior year IP PIN was entered
- IP PIN is entered under the wrong taxpayer/dependent
- Not using or incorrectly using your IP PIN when electronically filing will cause your return to reject

Get An Identity Protection PIN (IP PIN)

IRS.gov/ippin

Get An Identity Protection PIN (IP PIN)

English | Español | 中文(简体) | 中文(繁體) | 한국어 | Русский | Tiếng Việt | Kreyòl ayisyen

- **Individuals**
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- When to File
- Where to File
- Your Information
- Students
- Employees
- Parents

An Identity Protection PIN (IP PIN) is a six-digit number that prevents someone else from filing a tax return using your Social Security number or Individual Taxpayer Identification Number. The IP PIN is known only to you and the IRS. It helps us verify your identity when you file your electronic or paper tax return. Even though you may not have a filing requirement, an IP PIN still protects your account.

If you are a confirmed victim of tax-related identity theft and we have resolved your tax account issues, we'll mail you a CP01A Notice with your new IP PIN each year.

If you don't already have an IP PIN, you may get an IP PIN as a proactive step to protect yourself from tax-related identity theft.

If you want to request an IP PIN, please note:

- You must pass an identity verification process.
- Spouses and dependents are eligible for an IP PIN if they can pass the identity verification process.

Get an Identity Protection PIN YouTube video

Richard Furlong, Jr.

Senior Stakeholder Liaison

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richard.g.furlong@irs.gov