

IRS improves services to taxpayers with digital authorizations and launch of new Tax Pro Account

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WASHINGTON – The Internal Revenue Service today launched a new feature that will give taxpayers digital control over who can represent them or view their tax records, a groundbreaking step in the agency’s expansion of electronic options for taxpayers and tax professionals.

The new feature, one of many recent enhancements to the [Online Account](#) for individuals, will allow individual taxpayers to authorize their tax practitioner to represent them before the IRS with a Power of Attorney (POA) and to view their tax accounts with a Tax Information Authorizations (TIA).

“The ability for taxpayers to connect online with their tax professional is a groundbreaking step for the IRS,” said Chuck Rettig, IRS Commissioner. “This is the first, basic step toward a more fully integrated digital tax system that will benefit taxpayers, tax professionals and the IRS.”

As of today, tax professionals may go to the new [Tax Pro Account](#) on IRS.gov to digitally initiate POAs and TIAs. These digital authorization requests are simpler versions of Forms 2848 and 8821.

Once completed and submitted by the tax professional, the authorization requests will appear in the taxpayers’ Online Account for their review, approval or rejection and electronic signature. Because the taxpayers’ identities already are verified at the time of login, they simply check a box as their signature and submit the authorization request to the IRS.

A key benefit is the completed digital authorization, if accurate, will go directly to the Centralized Authorization File (CAF) database and will not require manual processing. Most requests will be immediately recorded and appear on the list of approved authorizations in the taxpayer’s Online Account and the tax professional’s Tax Pro Account. Some authorizations may take up to 48 hours. Tax professionals may then go to e-Services Transcript Delivery Service to see the taxpayer’s records.

This new digital authorization option will be a much faster process. It will allow the IRS to reduce its current CAF inventory and to focus on authorization requests received through fax, mail or the [Submit Forms 2848 and 8821 Online](#) – all of which require IRS personnel to handle.

To connect with their tax professionals, taxpayers either login to their [Online Account](#) using their IRS username and password or they must create an account after passing a one-time identity verification process. Taxpayers who cannot validate their identities cannot use this



option, and their tax professional must use the fax, mail or online submission process. However, the IRS will be announcing a new process for this application later this year.

Tax professionals should use their IRS usernames and passwords to access the Tax Pro Account or create an account after verifying their identities.

This initial launch of the Tax Pro Account represents the first release of the tool. Over time, additional functionality will be added for taxpayers and tax professionals that will increase the options for electronic interactions.

Currently, the digital authorization process is available only to individual taxpayers, not businesses or other entities. Also, tax professionals must be in good standing with the IRS and already have a CAF number prior to making requests through Tax Pro Account. To initiate the authorizations, tax professionals must enter their personal information and their clients' personal information exactly as it appears on IRS tax records. Also, the feature is available only to those with addresses in the United States. Tax Pro Account is a separate tool from e-Services.

To help tax professionals educate their clients about this new process, the IRS has created two e-Posters that practitioners may share. These are:

- [Publication 5533, Why You Should Create an IRS Online Account](#)
- [Publication 5533-A, How to Submit Authorizations Using Tax Pro Account and Online Account](#)

There are additional features available to individual taxpayers from their Online Account. Taxpayers can view:

- The amount they owe, updated for the current calendar day
- Their balance details by year
- Their payment history and any scheduled or pending payments
- Key information from their most recent tax return
- Payment plan details
- Digital copies of select notices from the IRS
- Their Economic Impact Payments, if any
- Their address on file

Taxpayers can also:

- Make a payment online
- See payment plan options and request a plan via Online Payment Agreement
- Access their tax records via Get Transcript