Tax professionals: How to manage authorizations using Tax Pro Account

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

1. Enter tax professional's and taxpayer's details
   - Professional's details: name, address, Centralized Authorization File (CAF) number
   - Taxpayer's details: name, address, tax identification number (TIN)
2. Select tax matter(s) and period(s)
3. For POA: Check box as electronic signature and submit for validation
4. Optional: Inform taxpayer to approve the request in their Online Account

Link your Centralized Authorization File (CAF) number

1. Select Link a CAF number from your profile
2. Follow the 2-step process to request a PIN and then enter your PIN. Allow 1-2 weeks for the PIN to arrive to the address registered on CAF.

Linking your CAF is a one-time process

View or withdraw active POA/TIA authorizations

1. Select a taxpayer in the Taxpayers tab
2. Click Authorizations to view active authorizations, regardless of how they were submitted
3. View authorization details or click withdraw

Once authorization is approved by the taxpayer or withdrawn by the tax professional, it's processed in CAF in real-time

Considerations for taxpayers and tax professionals

- *Names and addresses must match IRS records exactly*
- *Must have an address in the United States or the District of Columbia*
- *POA can be initiated by attorneys, CPAs, enrolled agents, enrolled actuary and retirement plan agents. TIA can be initiated by anyone with a valid CAF number.*

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