



Digital Authorizations



Benefits of Tax Pro Account and Digital Authorizations

All-digital authorization process improves service to taxpayers by offering real-time posting to the Centralized Authorization File (CAF). Tax Professionals: Make Tax Pro Account your primary tool for CAF.

Tax Pro Account Benefits:

- Provides all-digital process to initiate and sign authorization requests
- Records most authorizations immediately to CAF; some may take 48 hours
- Eliminates manual reviews, allowing faster service for taxpayers
- Allows for electronic signatures; taxpayers simply check a box and submit to CAF
- Revokes prior authorizations for same request type, tax matter and period
- Enhances identity protection by requiring IRS e-authentication for both parties

How Tax Pro Account Works:

- Tax professional accesses Tax Pro Account with IRS username and password
 - Initiates Power of Attorney (POA) or Tax Information Authorization (TIA)
 - Enters personal information exactly as entered on most recent tax return
 - Checks box for digital signatures on a POA
 - Submits to electronically transfer request to taxpayer's Online Account
- Taxpayer accesses Online Account with IRS username and password
 - Selects "Authorization" tab, reviews request
 - Checks box for approval or may also reject
 - Submits approved request directly to CAF
- Recorded authorizations display in both Tax Pro Account and Online Account
- Tax professional accesses e-Services' Transcript Delivery System as needed

What Tax Professionals Need to Know:

- Taxpayers must register for Online Account
- Tax professionals must already have a CAF number and be in good standing with the IRS.
- Limited to individual clients only; entities must use fax, mail or the online submission
- Authorizations can have multiple representatives/designees; follow correct process
- Available only to tax professionals and taxpayers with addresses in the United States
- New features will be added to Tax Pro Account, enhancing online connections to clients

Resources to share with clients:

Publication 5533, [Why You Should Create an IRS Online Account](#)

Publication 5533-A, [How to Submit Authorizations Using Tax Pro Account and Online Account](#)

For more information, visit www.irs.gov/taxproaccount and www.irs.gov/account.