



LB&I Taxpayer Digital Communication Secure File Sharing – Secure Messaging **A New Way to Connect with the IRS**



Troubleshooting Tips – LB&I Audits

Taxpayer Digital Communication Secure File
Sharing - Secure Messaging (TDC SFS-SM)

IRS Secure Messaging Taxpayer Consent Form

Taxpayers and their Power of Attorneys (POAs) invited to use the TDC SFS-SM system are referred to as “users”. Users will receive an IRS Secure Messaging Taxpayer Consent Form from their LB&I agent to complete. Users who have current LB&I audits will complete, sign, and return the consent form to their LB&I agent via in-person, email, e-fax, or mail. LB&I agents who have not had face-to-face contact with the user must meet in-person or hold a one-time meeting using an approved video conferencing platform, such as Convergence Cisco WebEx, ZoomGov, or Microsoft Teams to authenticate the user signing the consent form.

An authorized individual who can legally bind the company or a POA with a valid Form 2848 may sign the consent form.

The user must legibly complete the following on the consent form:

- Taxpayer’s complete name or company name,
- Social Security Number (SSN) or Employer Identification Number (EIN), and
- Authorized contacts, including their email addresses and phone numbers.

Consent Form Appendix

Only authorized users who are not employees of the company should check the “POA” box. POAs will have an account separate from their taxpayers allowing them to use the TDC SFS-SM system to represent multiple taxpayers. Users will need to determine who will be the primary contact for activities within the TDC SFS-SM system. When a new case is created, the TDC SFS-SM system will automatically generate an email to all users. All users listed can then log into the TDC SFS-SM system to receive and respond to messages.

Secure Access Digital Identity (SADI) Accounts

SADI is an IRS online services account allowing users to access most tax tools with the same user name and password. However, the TDC SFS-SM system will only allow an email address to be entered one time. The recommended work-around to this issue is for the user to use a business email address for the TDC SFS-SM system and a personal email address for the SADI system. Please follow the instructions below to change the SADI email address:

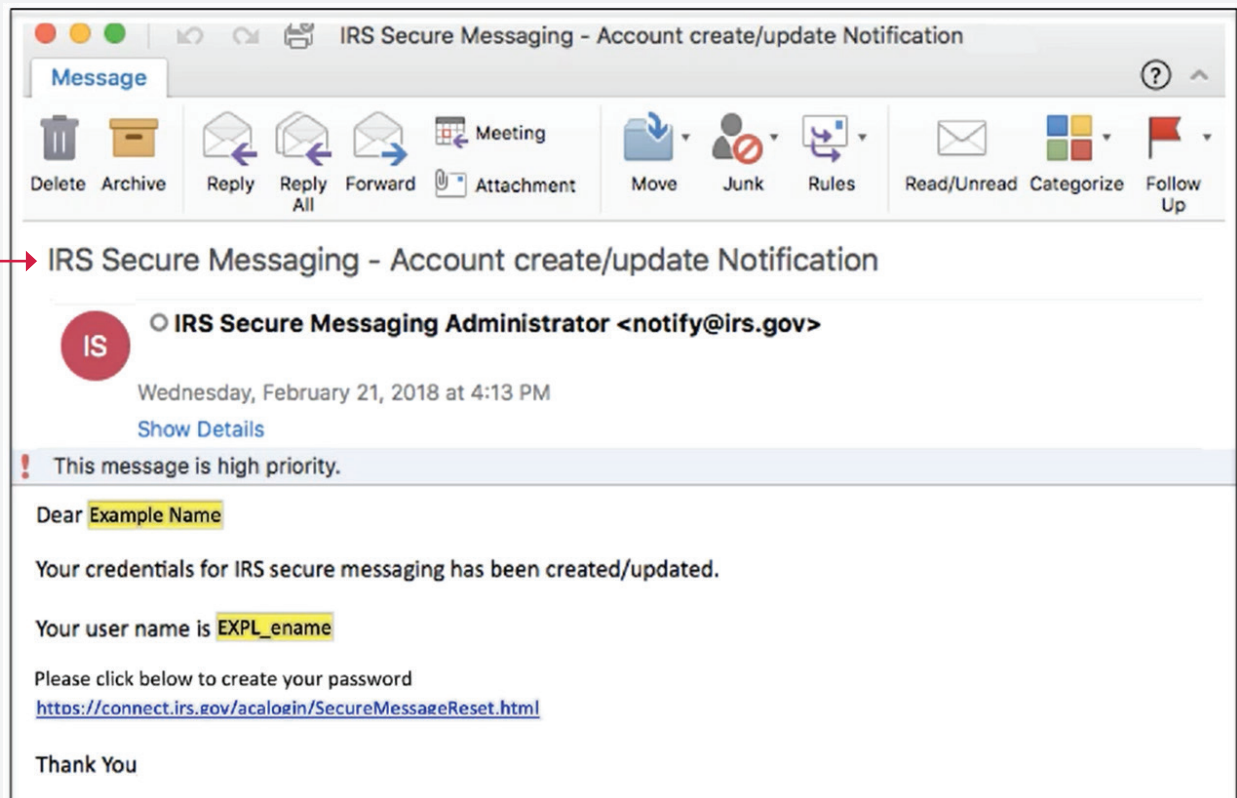
1. Go to [IRS.gov](https://www.irs.gov);
2. Click the [Sign in to your Account](#) button on the homepage;
3. Sign into Your Online Account
4. Log into ID.me or Sign in with an existing IRS username
5. Within your account, click Profile
6. Under Edit your User Profile scroll to Email and select Edit
7. Change email address to personal account
8. Scroll to bottom of Edit your User Profile screen
9. Click Update
10. Re-enter your password to save changes & log out
11. Log into [Access Secure Messaging](#)
12. Log into ID.me or Sign in with an existing IRS username to force the update
13. Log out and notify your agent

Account Creation and Initial Password Set-up

Once the IRS creates the account, each authorized user will receive the following notification via email. Within the email, they will find their name, their user name, and a link that will take them to the secure messaging portal.

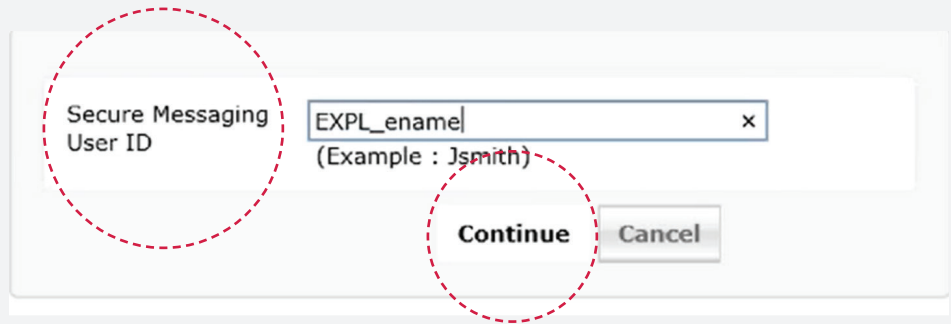
STEP 1

Account Creation Notification email



STEP 2

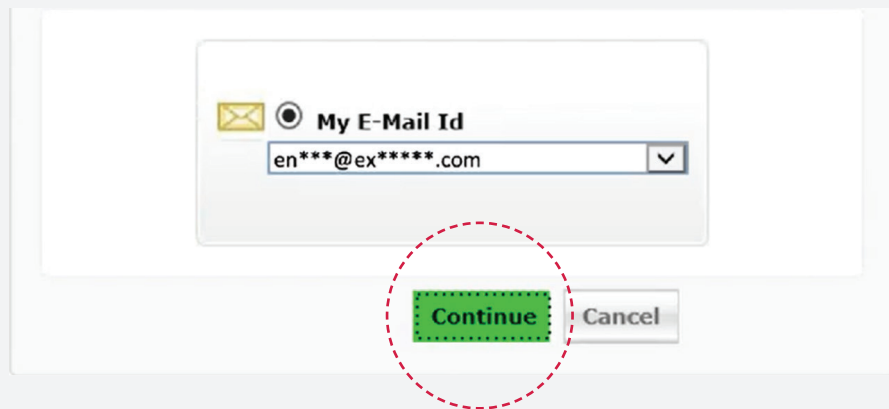
After clicking the link in the Account Creation Notification email, the user will be prompted to enter their **Secure Messaging User ID**. The user will enter their user name and click **Continue**.



A screenshot of a web form for entering a Secure Messaging User ID. The label "Secure Messaging User ID" is circled in red. The input field contains "EXPL_ename" with a placeholder "(Example : Jsmith)" and a clear button (x). Below the input field, the "Continue" button is circled in red, and the "Cancel" button is visible to its right.

STEP 3

The user will then see their partially masked email address and click **Continue**.

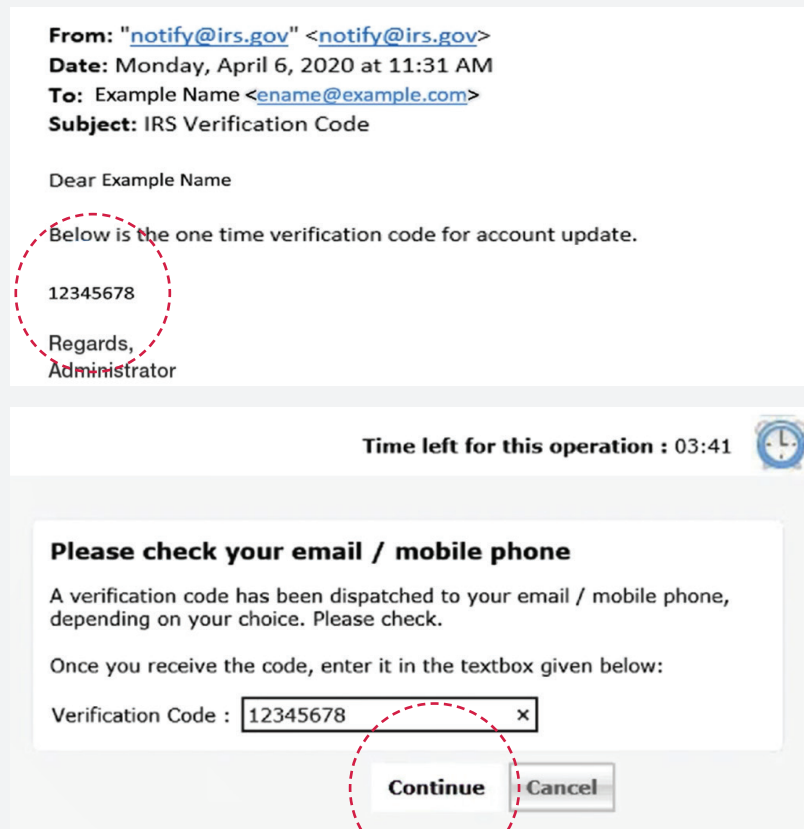


A screenshot of a web form for entering an email address. The label "My E-Mail Id" is next to an email icon. The input field contains "en***@ex*****.com" with a dropdown arrow on the right. Below the input field, the "Continue" button is circled in red, and the "Cancel" button is visible to its right.

STEP 4

The user will also receive a **verification code** from notify@irs.gov, providing a unique verification code needed to access their account for each login attempt. The user will enter the verification code on the next screen and click **Continue**. The one-time verification code email allows the user 30 minutes to complete the action before disabling the process.

Note: Auto-lockout occurs after 2 failed password reset attempts. A locked account will automatically unlock itself after 120 minutes.




A screenshot showing an email from "notify@irs.gov" with the subject "IRS Verification Code". The email body says "Dear Example Name" and "Below is the one time verification code for account update." The verification code "12345678" is circled in red. Below the email, there is a timer "Time left for this operation : 03:41" and a section titled "Please check your email / mobile phone". This section contains the text "A verification code has been dispatched to your email / mobile phone, depending on your choice. Please check." and "Once you receive the code, enter it in the textbox given below:". Below this text, the "Verification Code" input field contains "12345678" and is circled in red. The "Continue" button is circled in red, and the "Cancel" button is visible to its right.

STEP 5

This will take the user to a password creation page, where they will create a new password following the **Password Policy Requirements** listed below.

Note: All users must change their passwords every 60 days.

Time left for this operation : 02:33 

Password Policy Requirements

- Minimum password length must be 14 characters
- Must contain a combination of the following (at least one from each category)
 - Lowercase letters
 - Uppercase letters
 - Numbers
 - Special characters ~!@#\$%^&*()_+=<>.,?/\[]{}
- May not contain spaces
- May not be one of 10 previously used passwords
- New passwords must be at least one character different than the previous one

Reset Password


New Password :

Confirm New Password :

STEP 6

Once the password has been updated successfully, the following message will appear.

Note: The user will also receive an acknowledgment email, prompting them to access the secure message inbox.

 The password has been reset successfully.

To access your secure inbox, please refer to the email you received with the subject 'You Have A New IRS Secure Message Waiting'

From: "notify@irs.gov" <notify@irs.gov>
Date: Monday, April 6, 2020 at 11:36 AM
To: Example Name <ename@example.com>
Subject: Password Set/Reset Acknowledgement

Dear Example Name,

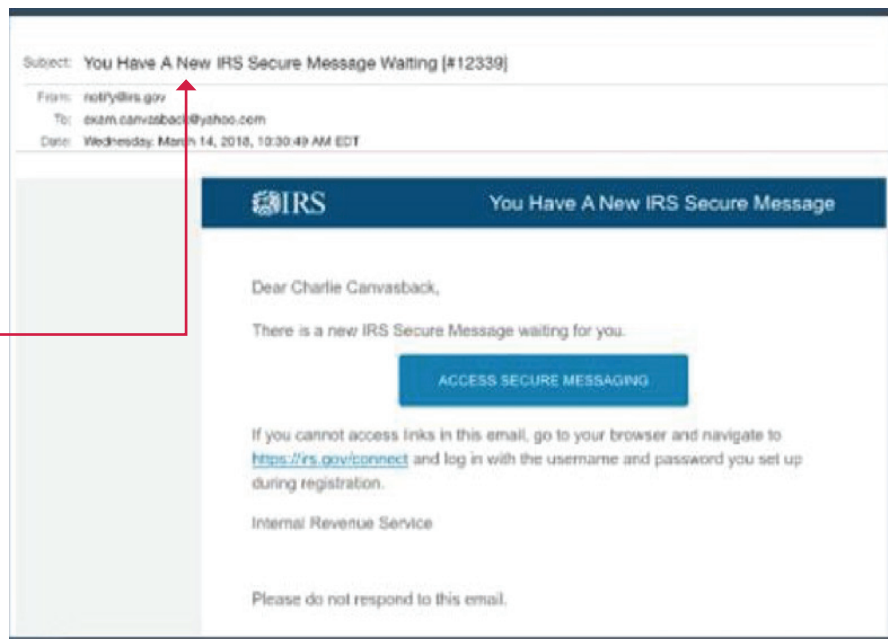
You have successfully reset your password.

To access your secure inbox, please refer to the email you received with the subject 'You Have A New IRS Secure Message Waiting'

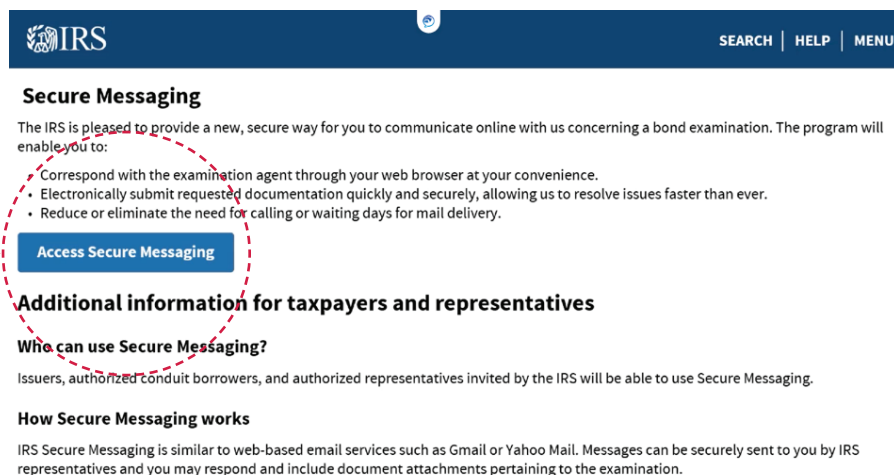
Thank You,
IRS Online Services

New Message Notification and Logging into the Secure Messaging Inbox

When the LB&I agent creates and sends a new message in the TDC SFS-SM system, the user will receive the following email: **You Have a New IRS Secure Message Waiting.**



Once on the Secure Messaging entry page, the user will click the **Access Secure Messaging** button.



The user will then enter their user name and password and click **Login**.



The user must accept the **Terms of Service**.

Terms of Service

I understand that in order to use the Taxpayer Digital Communications platform, I must agree to the following terms of service.

IRS Secure Messaging Terms of Service

I understand that in order to use the Internal Revenue Service's ("IRS") Secure Messaging platform, I must agree to the following terms of service.

I understand that as a taxpayer I have the right to receive certain notices and communications from the IRS in paper form by mail. By participating in the IRS Secure Messaging program, I am consenting to receive some of those documents through the IRS Secure Messaging platform, and I understand that I might no longer receive paper copies of certain notices and communications by mail. I am also consenting to allow persons whom I separately authorize to access my IRS records to receive some of the same documents through the IRS Secure Messaging platform when access is allowed under my authorization.

I also consent to the IRS's sending notification emails or telephone messages (e.g. SMS, MMS) to the email address and/or telephone number associated with my account with the IRS and that the notification messages will indicate that I should log into the IRS Secure Messaging platform to review relevant electronic notices and communications from the IRS.

I understand that the IRS Secure Messaging program is limited to some, but not all communications, from the IRS, and I have the responsibility to monitor several methods of communication (including mail, telephone, and other electronic methods), not just the IRS Secure Messaging platform, in order to communicate with and meet my obligations to the IRS. I understand that I have the right to stop using the IRS Secure Messaging program by properly notifying the IRS that I no longer wish to communicate electronically. I also understand that it is my responsibility to notify the IRS that my contact information has changed, including when I wish to use a different email address or telephone number to receive IRS Secure Messaging electronic communications.

I understand that my use of the IRS Secure Messaging platform does not convey any rights to me, and I understand that my use of IRS Secure Messaging platform is

How to access your Secure Message Portal for subsequent logins:

Secure Messaging Portal Link: <https://www.irs.gov/help/lbi-secure-messaging>

Once the LB&I agent creates a message for the user in the TDC SFS-SM system, the user will receive an email notifying them of a new message in their Secure Message Portal. To view and respond to this message, the user will need to log in to their Secure Message Portal. Each time the user logs into their Secure Message Portal, they will be required to input their user name and password. This will trigger a new email from notify@irs.gov, providing a unique verification code needed to access their account.

Secure Messaging Portal Inbox

Once the user has entered both their password and verification code, the user will then reach their Secure Messaging Inbox.

The user's portal only contains two boxes, an Inbox, and a Sent box. For more assistance, the Secure Messaging Portal contains a Secure Messaging Help box on the right side of the portal.

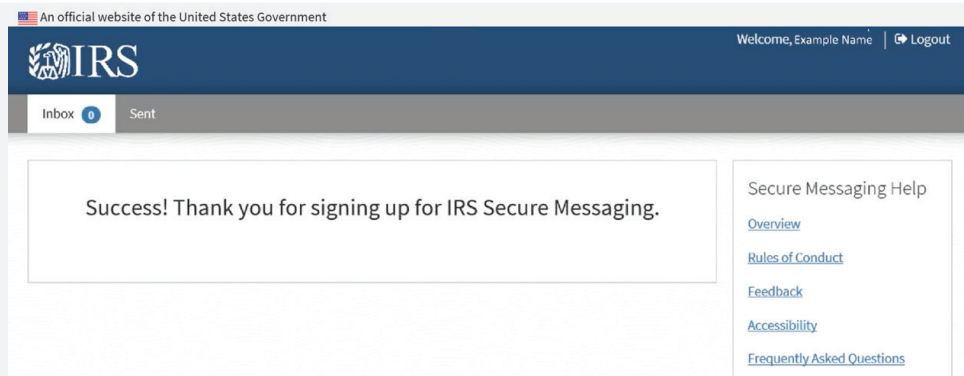
To view messages sent to the user, go to the Inbox. Now the user is ready to begin corresponding with their LB&I agent.

Users can't initiate messages within the Secure Messaging Portal. Once the LB&I agent initiates the first message, users will then be able to view and respond to messages in their Inbox, as well as view previously sent messages in their Sent box.

Replying to a Message

STEP 1

Log in to the TDC SFS-SM Secure Messaging Portal.

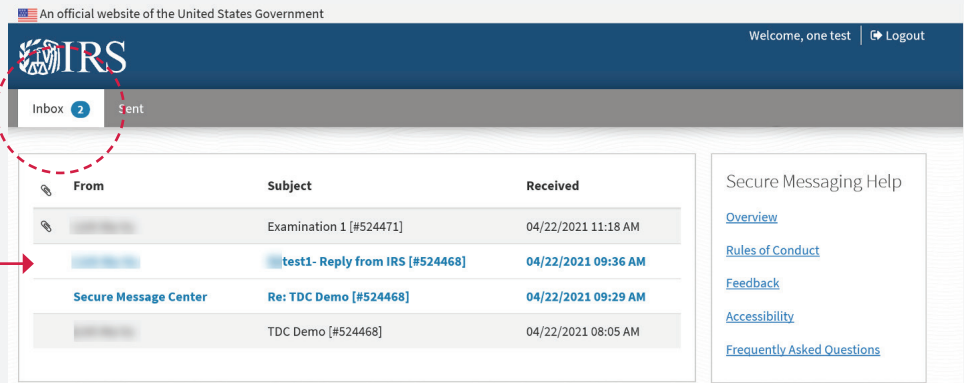


STEP 2

Click on **Inbox**.

STEP 3

Find the message you want to reply to. **Left click on the message to view.**

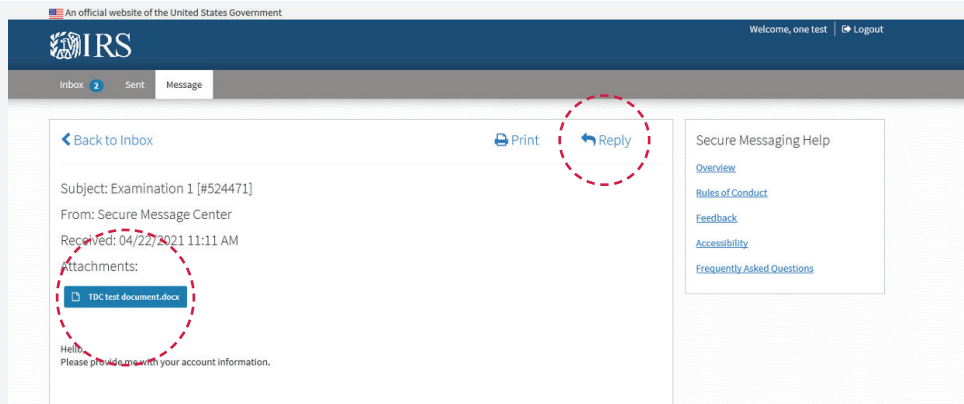


STEP 4

Click the **attachment** and follow browser prompts to open/save the file.

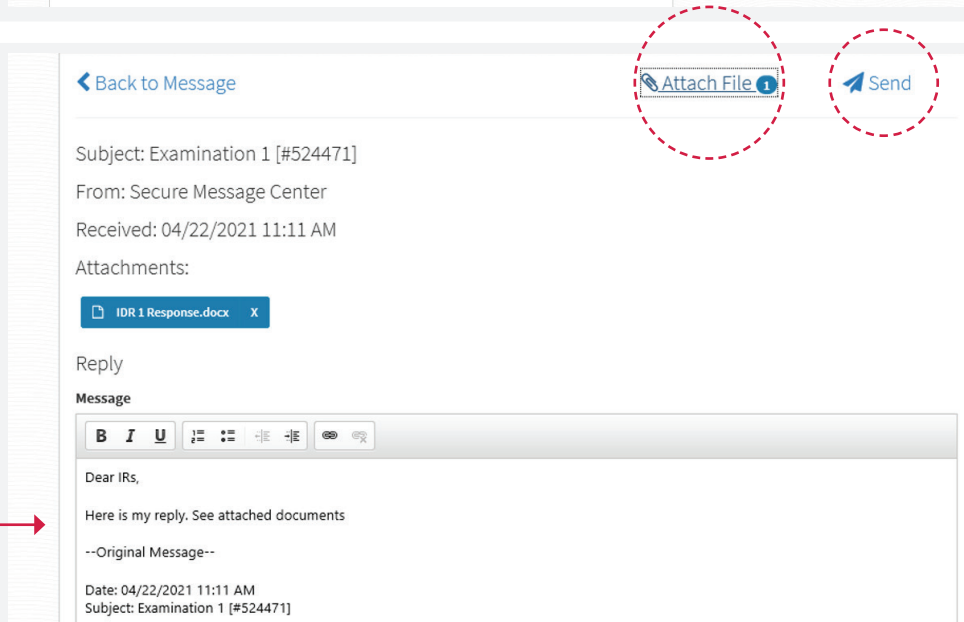
STEP 5

Click on the **Reply** button.



STEP 6

Compose your message. Attach a file if needed. Click **Send**.



Troubleshooting

If the user has not received the email from notify.irs.gov or has not received the one-time verification code, the user should:

1. Check their email junk or spam folders for emails from notify@irs.gov. Legitimate emails may be blocked or moved to the junk folder by internet service providers (ISPs) or other email security programs. Whatever the cause of the email blocking, an adjustment to the email security program may overcome the ISP email blocking.
2. Check their email Deleted Items folder to confirm emails from notify@irs.gov were not inadvertently deleted.
3. Check with their IT department to see if their firewall or network protection software may be blocking emails from notify@irs.gov.

If the user is unable to login to TDC, the user should:

1. Clear their browsing history/cookies
2. Reboot their computer

Resetting Password

Users will need their user name provided by the LB&I agent.

STEP 1

Verify notify@irs.gov is not being blocked.

STEP 2

Generate a new account notification by using their user name and the following link to reset their password:
<https://connect.irs.gov/adssp/accounts/authVerify?operation=reset>

STEP 3

Enter the user name to start the **Set/Reset Password** process.

STEP 4

If the system recognizes your user name, it will auto populate the email address in the Select your email address field, as shown in the **Get a verification code via email** screenshot below. The user should then click **Continue** to complete the Set/Reset Password process.

IRS
Department of the Treasury
Internal Revenue Service

Forgot your password?
To reset your password, start by entering your domain username.

* Enter Username (Example : jsmith)

[Continue](#)

WARNING! By accessing and using this government computer system, you are consenting to system monitoring for law enforcement and other purposes. Unauthorized use of, or access to, this computer system may subject you to criminal prosecution and penalties.

User name will display here

IRS
Department of the Treasury
Internal Revenue Service

Get a verification code via email

Select your email address
 .com

[Continue](#)

WARNING! By accessing and using this government computer system, you are consenting to system monitoring for law enforcement and other purposes. Unauthorized use of, or access to, this computer system may subject you to criminal prosecution and penalties.

STEP 5

If the TDC SFS-SM system does not recognize your user name, contact the LB&I agent to confirm the user's email address and user name are correct.

