

IRS E-Services Registration

Sign-up for E-Services or reset a password.

Includes the New IRS Registration and Security Protocols Going into Effect in the Near Future.



Roger Nemeth, EA

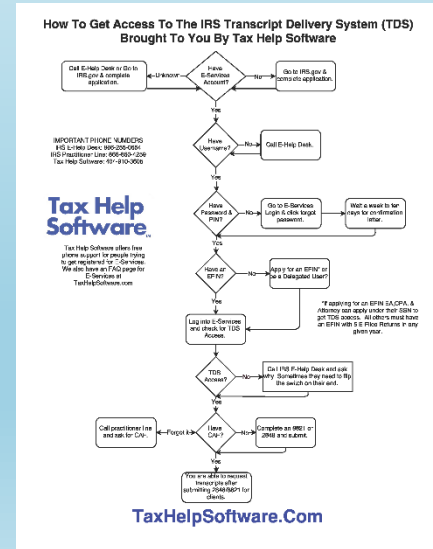
- Started managing tax franchises in 2006.
- Developed Audit Detective in 2010.
- Qualified as an N.T.P.I. Fellow in 2015.
- Worked as a programmer for the largest Tax Resolution Company integrating automated transcript systems into workflow programs.
- Assisted in the downloading and research of over 30 million transcripts.
- To date our software has been used to download just under one-fifth of a billion transcripts (200,000,000).



Presentation Overview

This presentation will cover how to register for IRS E-Services and gain access to the Transcript Delivery System (TDS).

Flow Chart
Handout Available



What Is IRS E-Services?

E-Services is a suite of web-based tools that allow tax professionals and payers to complete certain transactions online with the IRS. The tools include Registration Services, e-file Application (EFIN's), Transcript Delivery and TIN Matching. These services are only available to approved IRS business partners as noted below and not to the public.

Features For the Tax Pro

- Sign up for an EFIN.
- Close an EFIN or disassociate from an EFIN.
- Confirm number of E-Filed Returns under an EFIN (IRS recommends you check each EFIN once a year to check for EFIN spoofing).
- Transcript Delivery System (The most beneficial feature).
- Online Payment Agreement under POA (New System).
- Online 2848 and/or 8821 (Future feature).

Transcript Delivery System

- The Transcript Delivery System (TDS) allows users to request and download IRS transcripts.
- The taxpayer must give permission to the tax professional with a signed 8821 or 2848.

3 Scenarios For Getting Transcript Delivery System Access

1. Create an IRS E-Services Account.....

And

1. Sign-up for an EFIN and have a minimum of 5 E-Filed returns in any given year.
2. As a Circular 230 Preparer (EA, CPA or Attorney) sign up for an EFIN as a Sole Proprietor under their SSN.
3. Have someone who has access to TDS assign someone as a Delegated User.

Only Use Internet Explorer When Using E-Services

E-Services is an antiquated, cumbersome system with many quirks that make it difficult to use. The IRS notes: “e-services is compatible with IE6 to IE11 only”. Many users still try to use Edge, Chrome, Safari, or Firefox. We have had multiple THS users use non-approved browsers and try to change their passwords. They completed the process but the new password does not save and they lock themselves out trying to use the new password. Also, transcripts will not print from TDS using Chrome.

Determine If You Already Have An E-Services Login

1. Go to IRS.Gov → for Tax Pros → Login or Register (Under E-Services on left side) → Register
2. Complete the form (Need AGI from one of past 2 years to confirm identity).
3. After clicking “Accept” it will tell you if you already have an account.
4. If not continue to Register. You will need to wait 7-10 days for a confirmation letter to be mailed to you.

OR

1. Call the E-Help Desk at 1-866-255-0654 and ask them if you have an account.

Recover Forgotten Username

- If you already have an account the only way to recover a username is to call the IRS E-Help Desk at 1-866-255-0654.
- To verify identity they usually ask for an AGI from the past couple of years, but the questions can vary.

Recover Forgotten Password or PIN

- Go to the IRS E-Services login page and click on Forgot Password.
- **Warning!!!** You will lock yourself out of the Transcript Delivery System for a week to ten days waiting on a confirmation letter from the IRS.
- You can reset your password and/or pin.
- PIN's are 5 digits.
- Most people's pin are a zip code or the first 5 or last 5 digits of the SSN.

New IRS Registration & E-Services Procedures

In September 2016 the IRS announced the biggest change to its E-Services System since it was launched in 2004. The changes are being implemented to enhance the security of the system due to the cyber hacking issues that have evolved over time.

This presentation has been updated with the latest information. Originally the IRS announced October 24th as the official launch date, but on October 14th they suspended the launch until sometime in 2017 to give organizations time to adapt to the new system.

New Re-Verify Identity Procedure

On November 28th the IRS advised anyone who accesses E-Services and the Transcript Delivery System that they need to re-verify their identity by creating a Get Transcript account or if you already have a Get Transcript account login and complete the updated security questions. This also applies to newly created E-Services Accounts.

If you are unable to validate online you can use the alternative method and call the E-Help Desk at 1-866-255-0654.

Note: If you accessed or created your Get Transcript Account after May 2016 you are already validated and no further action is required.

New Registration & Get Transcript Registration

Here's what new users need to get started (This will replace the current E-Service procedure in the near future):

- A readily available email address.
- Your Social Security number.
- Your filing status and address from your last-filed tax return.
- Your personal account number from a:
 - credit card, or home mortgage loan, or home equity (second mortgage) loan, or home equity line of credit (HELOC), or car loan (The IRS does not retain this data).
- A readily available mobile phone. Only U.S.-based mobile phones may be used. **Your name must be associated with the mobile phone account.** Landlines, Skype, Google Voice or similar virtual phones as well as phones associated with pay-as-you-go plans cannot be used (An alternative method is now available).
- If you have a “credit freeze” on your credit records through Equifax, it must be temporarily lifted before you can successfully complete this process.

Alternate Phone Validation

The IRS recognizes that some people do not have text enabled cell phones in their name (they might be in a spouses name or under the business). In that case you can request a postcard be sent to your address of record with a confirmation code. Once received, you should be able to enter a text enabled phone number and confirm a received text. A Google Voice or other text enabled virtual phone number can be used with this method.

A third option will be available in the future that will allow the user to register a landline and receive verbal security verification codes.

Username, Password & PIN Rules

Usernames:

- Cannot be an e-mail address.
- Cannot include your SSN.

Passwords:

- Must be a minimum of 8 and a maximum of 32 characters long
- Must contain 1 of each lower case letter, upper case letter, number, and special character (^, > and < are not valid characters)
- The password is case-sensitive
- Passwords may not match any of the last 24 passwords you have chosen
- Your password may not match or contain your username, first name, last name, or Social Security Number
- Passwords may not contain strings of 3 or more consecutive characters (e.g. aaa, \$\$\$)
- Passwords must be changed every 180 days or they will expire

PIN:

- Must be 5 digits.
- Most people use a zip code or the first five or last five of their SSN.

IRS Is Consolidating Logins

- Once the new system is launched the IRS will combine the logins for E-Services, Get Transcripts (different than TDS), Online Payment Agreement, Identity Protection PIN & e-Postcard.
- For some reason the PTIN applications are excluded from the new system.
- The IRS announced that once the systems are combined the E-Services username will become the primary for the account if a user has multiple accounts.

Note: When the new system is launched the E-Services username will become the overall username and the IRS will force a password change at that time.

Passwords Are Not To Be Shared

From the IRS E-Services Terms Of Use:

“Member Account, Password and Security:

As part of the registration process, you selected a username, password and PIN. You are responsible for maintaining the confidentiality of this information. While it may be necessary to disclose your username or PIN to an IRS employee or other individual, you agree not to disclose your password to anyone. You are fully responsible for all activities that occur under your password. IRS personnel do not have access to your password and should never ask you for it.”

People often ask is it illegal to share the password with my staff. The answer is no, BUT it is a violation of the terms of use and you could be banned from using E-Services if caught.

Apply For An EFIN

1. Log into E-Services.
2. Click on Application.
3. Select New Application (you can also save a partially completed application and return at a later time).
4. Complete application (Make sure you submit application).
5. If you are not a Circular 230 Tax Professional (CPA, Attorney, or EA) you must submit your fingerprints.
6. Pass a suitability check.
 - This may include: a credit check; a tax compliance check; a criminal background check; and a check for prior non-compliance with IRS e-file requirements.

services

[Application](#)

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Welcome to IRS e-services

Roger Nemeth
Representing Roger W Nemeth

[Application](#)

Access to apply or revise an existing application on-line for participation in IRS *e-file* Program or Taxpayer Identification Number (TIN) Matching.

[Remove Affiliation](#)

Provides access to the Firm Disassociation page that will allow you to remove your affiliation to the *e-file* firm or organization you selected. Disassociating yourself from the *e-file* application will remove your name from each of the *e-file* applications shown and will eliminate all authority that resulted from your affiliation.

[Reporting Agent e-Services](#)

Provides access to Transcript Delivery System and Electronic Account Resolution.

[Transcript Delivery System](#)

Transcript Delivery System (TDS) provides self-service for return and account information requests by external customers through e-services portal. TDS automates the validation, processing, and delivery of taxpayer information to the authorized third party user, thus requiring less intervention from IRS personnel.

[Registration Services](#)

Registration Services allows you to confirm your registration, revise your registration information, change your password or PIN and recover a lost password or PIN.

E-Services Main Menu Features

- Application
 - Apply, revise, or close an existing EFIN application.
- Remove Affiliation
 - Disassociate from EFIN.
- Reporting Agent E-Services
 - Does not apply to Tax Pros.
- Transcript Delivery System
 - Allows the user to request and download IRS Transcripts electronically.
- Registration Services
 - Confirm registration.
 - Revise contact info.
 - Change password or PIN
 - Recover lost password or PIN

Delegated Users

- A delegated user can use their parent member's CAF number to access any transcripts that are approved under that CAF or they can get their own CAF.
- Example: My wife is not a tax professional. She is a delegated user under my EFIN and can access any transcripts I have access to or she can get them under her own CAF number.
- To assign a delegated user just log into your E-Services Account and click on the EFIN application you would like to add them to (They only need to be delegated on one to get access).



e-file Application

Name: Roger W Nemeth

Social Security Number(SSN): XXX-XX-9512

You are about to revise the application for your Firm/Organization. If your application has been submitted and been accepted by the IRS you may have to re-submit your application for review based on your revisions. Not all changes will require you to re-submit the application for review.

Select the area of the application you want to enter, revise or view information about:

[Add New Location](#)[Firm Name & Business Type](#)[Firm/Organization Address](#)[Principal\(s\)](#)[Responsible Official\(s\)](#)[Application Contact\(s\)](#)[Program\(s\) Applying For](#)[Form\(s\)](#)[EFIN Status](#)[Firm Suitability Information](#)[Delegated User\(s\)](#)[Application Status](#)[Service\(s\) Authorized For](#)[Application Summary](#)[Personal Information](#)[Application Comments](#)[Application Submission](#)[Self Certification](#)

Delegated User

When you have finished, you may do any of the following:

- Select *Cancel* to exit the application.
- Select *Return to Search* to return to Search e-file Application.

e-file Application : Delegated User(s)

Name: Roger W Nemeth

Social Security Number(SSN): XXX-XX-9512

You may add users to your application that you wish to delegate authorities to. Delegated users are **not required** to submit the application.

You can select any of the following actions from the table below:

- Select *Authorities* to go to Delegate authorities page.
- Select *Edit* to edit delegated user entries. (The editable entries will appear in the section below.)
- Select *Delete* to delete a delegated user.

Name	TIN	Organization Role	Principal Consent	Title	Delegate Authorities	Edit	
Nemeth,Rebecca R		Delegated User	No		Delegate Authorities	Edit	Delete
Thompson,Laura A		Delegated User	No	Operation Manager	Delegate Authorities	Edit	Delete

*First Name (Required):

Middle Initial:

*Last Name (Required):

Name Suffix:

Title:

*Social Security Number (Required):

Email Address:

Is this person also a principal consent? No Yes

- Select *Add* to add a delegate.
- Select *Clear* to clear the form.

Add

Clear

CAF Number

- To request a CAF number complete an 8821 or 2848 on someone (taxpayer, spouse, self, etc...) and fax it to the IRS.
 - They are supposed to send you a letter with your CAF Number within 30 days, but often times the letter is not received. The letter is only sent after the first request.
 - Best Practice: Call the Practitioner Line 2-3 days later and advise them you forgot your CAF number (do not tell them you just applied or they will tell you to wait 30 days and call back). IRS.gov states you can call PPL (also known as PPS) and retrieve a forgotten CAF.
 - Note: This is the only time in working with E-Services you will call PPL instead of the E-Help Desk.
- In rare instances a user can have multiple CAF's. This is from the old days over 10 years ago. The IRS has been trying to consolidate everyone down to just 1.
- **CAUTION:** A business can also be issued a CAF number but the business cannot get access to TDS only individuals who work for a business. Be careful not to list your business CAF on the 2848 or 8821 because you will not get access to the transcripts. Also, make sure you only use the individual CAF when using TDS or all requests will fail.

services

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[Registration Services](#)

Registration Services allows you to confirm your registration, revise your registration information, change your password or PIN and recover a lost password or PIN.

If you can see Transcript Delivery System as an option you now have access.

If you followed the instructions and do not see Transcript Delivery System you should call the E-Help Desk.

NOTE: If you click on “Forgot Password” or your password expires you will be able to login to E-Services but TDS will not be available until you enter the confirmation code.

New System Will Allow Immediate Password Resets

Under the old system, if you forgot your password or let it expire the IRS would mail you a new confirmation code which took up to 14 days. The new system will allow immediate password resets.

The Dreaded Confirmation Letter

The confirmation letter should become a thing of the past unless you are doing the alternative verification process due to a lack of a cell phone in your name or financial history on your credit report to validate your identity.

Two-Factor Authentication

When the IRS launches the new system a text will be sent to your registered text enabled phone number each time you login. A new security code will need to be entered EACH AND EVERYTIME you log into E-Services. This prevents someone from accessing an E-Services account even if they have the username & password. Here is the screen:



We sent a security code text message to your phone

A 6-digit security code has been sent to the phone number you provided (ending in 0758). Please enter your security code below.

6-digit security code

[Resend Security Code](#)

[No longer have access to this phone?](#)

CANCEL

SUBMIT



THS Two Factor Handling

The ProPlus & Executive Products will work exactly as they always have except the following screen will pop up every time a transcript request or CAF Check is made:

During testing THS was able to stay logged in for several hours completing a large number transcript downloads under one login.

The Executive Version may be able to auto import the security code into the software automatically.

Enter IRS Security Code

Time Remaining to enter Security Code **00:41**

A 6-digit security code has been sent to the phone number you provided (ending in 0758). Please enter your security code below.

Security Code

Cancel Continue

THIS U.S. GOVERNMENT SYSTEM IS FOR AUTHORIZED USE ONLY!
Use of this system constitutes consent to monitoring, interception, recording, reading, copying or capturing by authorized personnel of all activities. There is no right to privacy in this system. Unauthorized use of this system is prohibited and subject to criminal and civil penalties, including all penalties applicable to willful unauthorized access (UNAX) or inspection of taxpayer records, (under 18 U.S.C. 1030 and 26 U.S.C. 7213A and 26 U.S.C. 7431.)

QUESTIONS?

Additional Free Information Can be found at:
[TaxHelpSoftware.com](https://www.TaxHelpSoftware.com)