

TaxWise® Learning Portal

Creating an e-Services Account

Another critical number that professional tax preparers need is an electronic filing identification number (EFIN). The IRS assigns this number to preparers who they have approved for the federal and state e-file program.

Unlike the PTIN, an EFIN does not expire or require renewal. However, if the name of your tax office or Employer Identification Number (EIN) changes, you will either need to replace your EFIN or update it through the online portal.

The first step to obtaining an Electronic Filing Identification Number (EFIN), is creating an creating an IRS e-Services account on the [IRS website](#).

To create an IRS e-Services account:

1. Go to: <https://www.irs.gov/tax-professionals/e-file-provider-services>
2. Click on the Access e-File Application button.

E-file Application

Use our online e-file application to [become an authorized e-file provider or view and update existing applications](#).

It is only through an approved e-file application that tax professionals, who are [Electronic Return Originators \(EROs\)](#), [Circular 230 Practitioners](#), or [Reporting Agents \(RAs\)](#), can gain access to the Transcript Delivery System. EROs must e-file five or more returns in a tax season to be eligible. Circular 230 Practitioners need only apply and be approved.

Access e-file Application

*requires login credentials

IRS now offers a sign-in option with ID.me, which offers access to IRS online services with a secure account that protects your privacy.

3. Do one of the following:
 - Sign in with ID.me.
 - Create an ID.me account .
4. For the purpose of this lesson, click ID.me Create an account button.



Sign In or Create a New Account

IRS now offers a sign-in option with ID.me, which offers access to IRS online services with a secure account that protects your privacy.

ID.me is an account created, maintained, and secured by a technology provider.

If you don't have an ID.me account, you must create a new account.

Sign in with an existing account

Sign in with **ID.me**

OR

Create a new account

ID.me Create an account

5. On the Create an ID.me account page, enter your email and password, and then rekey your password for confirmation.
6. Do the following:
 - Select the **Remember Me** checkbox if you want to this device to remember your credentials. For security reasons, select only on your devices.
 - Select that you accept the ID.me Terms of Service and Privacy Policy
7. Click **Create account**.

Create an ID.me account



If you already have an ID.me account, do not create a new one. [Sign in to your existing account.](#)

* Indicates a required field

Email *

Password *

Confirm Password *



Remember me

For your security, select only on your devices.



I accept the ID.me [Terms of Service](#) and [Privacy Policy](#) *

Create account

8. To protect your identity from fraudulent actors, your authentication and transaction-related data will be shared with the IRS. This helps ensure that it is really you are interacting with the website and not someone pretending to be you. Click **Continue**.

ID.me

+



CONTINUING TO THE INTERNAL REVENUE SERVICE

To protect your identity and information from fraudulent actors, your authentication and transaction-related data (the information related to your ID.me account and identity verification) will be shared with the IRS. This helps ensure that it is really you interacting with the website and not someone pretending to be you.

This information includes transaction-related data like the following:

- Prior sign-ins using your ID.me account (but the names of the websites you access would not be disclosed)
- Multi-factor authentication methods (e.g., text message or push notification)
- The status of your verification (e.g., what steps you have or have not completed; partially entered information)

If you choose not to continue, you will not be able to use your ID.me account to access IRS.

[Continue](#)

9. Once your ID.me account has been created, you will receive an email. To proceed, click **Confirm your email**.

Welcome!

Thanks for creating an ID.me account!

ID.me simplifies how you verify and share your identity online, while helping keep your information safe.

You can confirm your email address by clicking the link below.

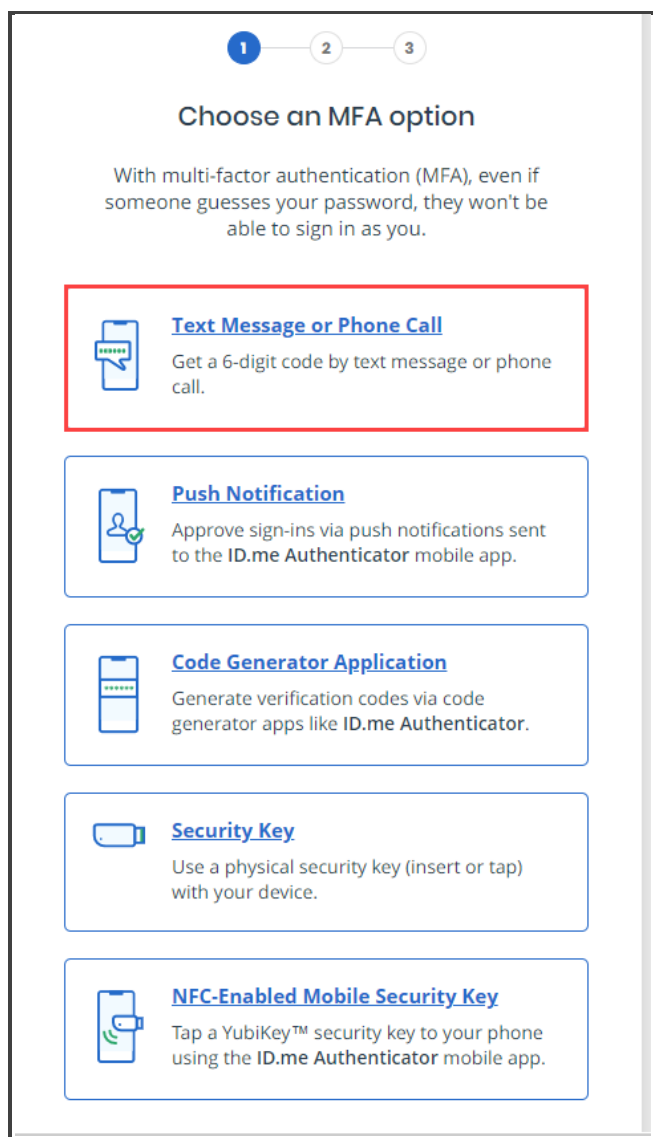
[Confirm your email](#)

Please note: This link will expire in 15 minutes.

10. You will be directed to the Secure Your Account page. Choose your MFA option. Options include:

- Text Message or Phone Call
- Push Notification
- Code Generator Application
- Security Key
- NFC-Enabled Mobile Security Key


11. For the purpose of this lesson, I used Text Messages or Phone Call.




1 — 2 — 3

Choose an MFA option


With multi-factor authentication (MFA), even if someone guesses your password, they won't be able to sign in as you.




Text Message or Phone Call
Get a 6-digit code by text message or phone call.




Push Notification
Approve sign-ins via push notifications sent to the ID.me Authenticator mobile app.



Code Generator Application
Generate verification codes via code generator apps like ID.me Authenticator.



Security Key
Use a physical security key (insert or tap) with your device.



NFC-Enabled Mobile Security Key
Tap a YubiKey™ security key to your phone using the ID.me Authenticator mobile app.

12. Enter your phone number and select if you want to receive a text or a phone call.


13. For the purpose of this lesson select Text me and click **Continue**.


123

Receive a code by phone


Please use a phone number you can access whenever you plan to sign in.

Phone Number





Text me



Call me

THE NUMBER PROVIDED WILL ONLY BE USED FOR ACCOUNT SECURITY. MESSAGE AND DATA RATES MAY APPLY.

[Go back](#)

Continue


14. Retrieve the 6-digit code from your phone and enter it in the appropriate fields. Click Continue.


123

Receive a code by phone


Please use a phone number you can access whenever you plan to sign in.

Phone Number





Text me



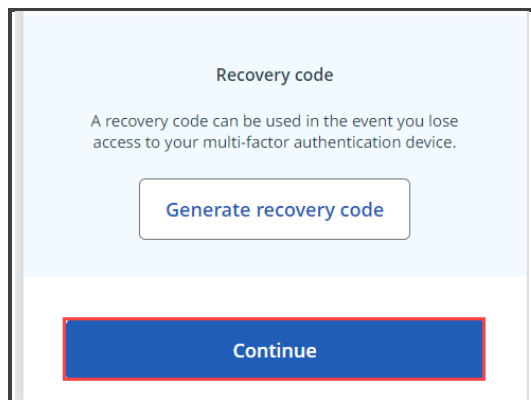
Call me

THE NUMBER PROVIDED WILL ONLY BE USED FOR ACCOUNT SECURITY. MESSAGE AND DATA RATES MAY APPLY.

[Go back](#)

Continue

15. Your phone number can now be used for multifactor authentication. Click **Continue**.

A screenshot of a web interface for generating a recovery code. The background is light blue. At the top, the text "Recovery code" is centered. Below it, a paragraph states: "A recovery code can be used in the event you lose access to your multi-factor authentication device." In the center, there is a white button with a blue border labeled "Generate recovery code". At the bottom, there is a large blue button with a red border labeled "Continue".

Recovery code

A recovery code can be used in the event you lose access to your multi-factor authentication device.

Generate recovery code

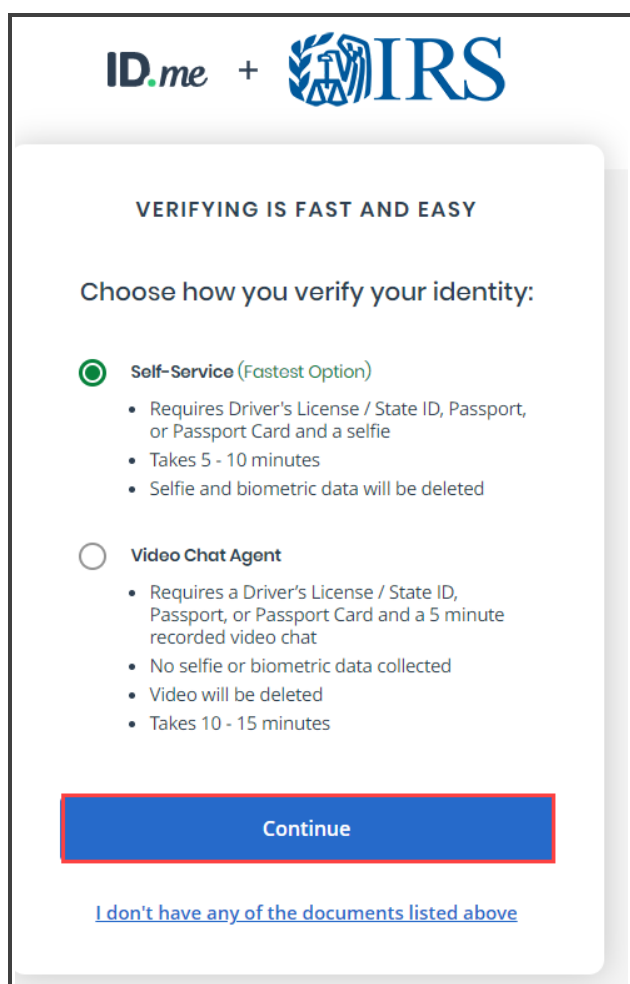
Continue

Next step is verifying your identity. You can use one of two options.

- **Self-Service** – Requires Driver's License/State ID, passport, or passport card and selfie and will take 5 to 10 minutes.
- **Video Chat Agent** - Requires Driver's License/State ID, passport, or passport card and a 5-minute recorded video chat and will take 10 to 15 minutes.

For the purpose of this lesson select **Self-Service** and click **Continue**.

16. For the purpose of this lesson select **Self-Service** and click **Continue**.

A screenshot of the ID.me + IRS verification interface. At the top, the logos for "ID.me" and "IRS" are displayed with a plus sign between them. Below the logos, the text "VERIFYING IS FAST AND EASY" is centered. Underneath, the heading "Choose how you verify your identity:" is followed by two radio button options. The first option, "Self-Service (Fastest Option)", is selected with a green radio button. It includes three bullet points: "Requires Driver's License / State ID, Passport, or Passport Card and a selfie", "Takes 5 - 10 minutes", and "Selfie and biometric data will be deleted". The second option, "Video Chat Agent", is unselected with a white radio button. It includes three bullet points: "Requires a Driver's License / State ID, Passport, or Passport Card and a 5 minute recorded video chat", "No selfie or biometric data collected", and "Video will be deleted". At the bottom, there is a large blue button with a red border labeled "Continue". Below the button, there is a link that says "I don't have any of the documents listed above".

ID.me + IRS

VERIFYING IS FAST AND EASY

Choose how you verify your identity:

☒ **Self-Service** (Fastest Option)

- Requires Driver's License / State ID, Passport, or Passport Card and a selfie
- Takes 5 - 10 minutes
- Selfie and biometric data will be deleted

☐ **Video Chat Agent**

- Requires a Driver's License / State ID, Passport, or Passport Card and a 5 minute recorded video chat
- No selfie or biometric data collected
- Video will be deleted
- Takes 10 - 15 minutes

Continue

[I don't have any of the documents listed above](#)

17. Next you must provide consent for ID.me to collect the biometric data and sensitive personal information. Click the checkbox next to the I acknowledge statement and click **Continue** to proceed.

Consent for ID.me to collect Biometric Data and Sensitive Personal Information

CONSENT FOR ID.ME TO COLLECT BIOMETRIC INFORMATION AND SENSITIVE PERSONAL INFORMATION

In the event of any discrepancy between a non-English version of this document and the English version of this document, the English version shall prevail in all respects.

BIOMETRIC INFORMATION PRIVACY STATEMENT

ID.me will not sell, rent, or trade your Biometric Information, and after verification you may request we delete your Biometric Information. Your Biometric Information will only be used by ID.me to verify your identity in accordance with the guidelines published by the National Institute for Standards and Technology or as required for the prevention of fraud. ID.me will transfer your Biometric Information to our third party partners only when required by a subpoena, warrant, or other court ordered legal action.

Notice and Consent

This Notice and Consent for the collection of Biometric Information, Personal Information and Sensitive Personal Information ("Consent") describes how ID.me

☒ I acknowledge that I have received, read, and agreed to these terms

Continue

18. Next, enter the mobile phone number. ID.me will text you a link to take photos of your identity document. Your smart phone must have a camera and web browser. Enter your mobile number and click **Continue**.

Take photos of your identity document

Enter a mobile phone number, then we'll text you a link to take photos of your identity document.

Identity Document

Driver's License

[Change document](#)

Mobile Phone Number

 ▼

Your smartphone must have a camera and a web browser.

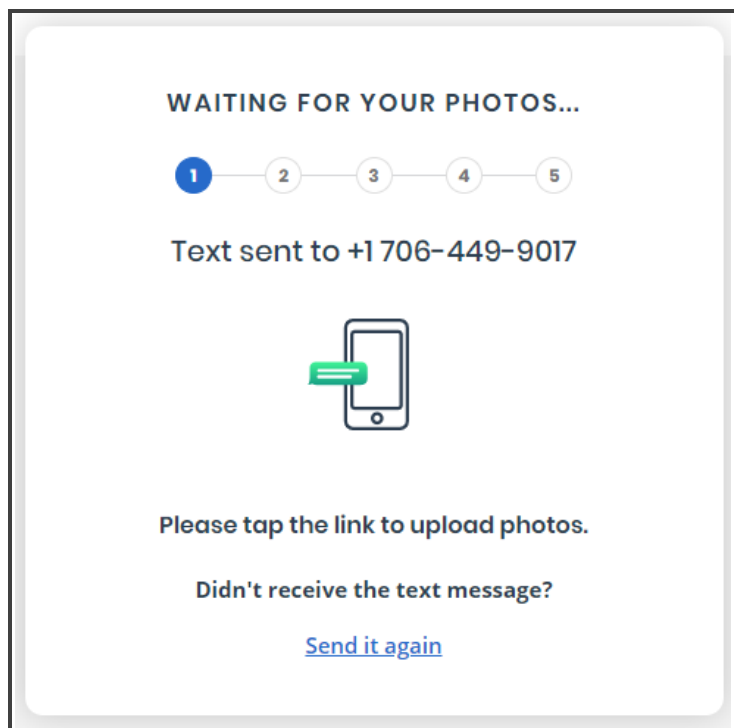
By entering your phone number, you agree to receive notifications through text message or voice calls during sign-in attempts in order to protect your account.

Continue

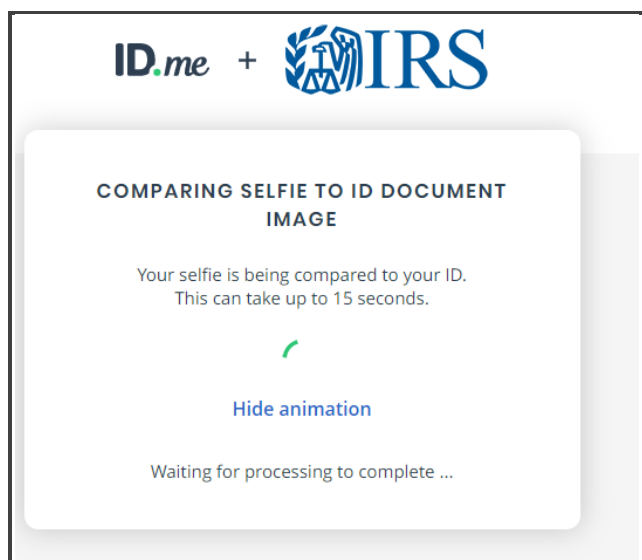
[I don't have a smartphone](#)

[I don't have a US phone number](#)


19. You will receive a text with a link for you to follow and upload your photos and then take a selfie.



20. Once you upload your Identity document and your selfie, ID.me will compare them.



21. Once the verification is complete, you will be prompted to enter your Social Security number and click **Continue**.



VERIFY YOUR IDENTITY

1 — 2 — 3 — **4** — 5

Enter your Social Security number

Social Security Number (#####) *

.....

The Social Security number is used as a unique identifier to confirm identity. This will not affect your credit score.

[Back](#) **Continue**

[I don't have a Social Security Number](#)

22. ID.me displays the information that will be used to verify your identity against trusted sources. Select the checkbox to indicate that the information provided is correct and click **Yes**.

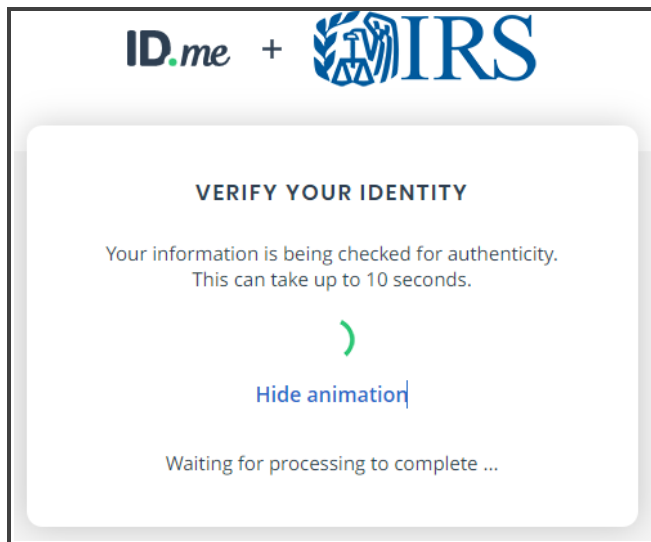
☒ The information I've provided is correct, and I accept the use of [Fair Credit Reporting Act](#) data to verify my identity.

What is The Federal Fair Credit Reporting Act? ^

No **Yes**

See our [Privacy Policy](#) for how we treat your data.

23. ID.me verifies the information you provided.



24. Once the information is verified you must authorize ID.me to release this information to the Internal Revenue Service. To proceed, click **Allow**.

AUTHORIZE THE INTERNAL REVENUE SERVICE

Before we send you back to **The Internal Revenue Service**, we need your permission to share your verified identity information.

Please note that only information obtained from the verification process will be shared.

The Internal Revenue Service will receive:

- | | |
|---------------|---------------|
| ✓ First Name | ✓ Middle Name |
| ✓ Last Name | ✓ Email |
| ✓ SSN | ✓ Birth Date |
| ✓ Phone | ✓ Street |
| ✓ City | ✓ State |
| ✓ Postal Code | |

You can remove this access at any time by changing your **ID.me** account settings.

Allow

[Deny](#)

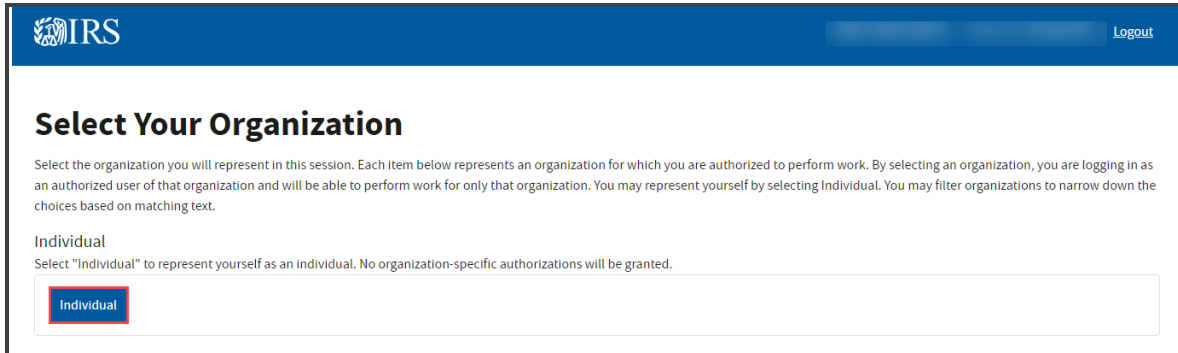
25. You are now redirected to The Internal Revenue Service page.



You are now returning to
The Internal Revenue Service



26. From the IRS.gov page, select the organization you will represent in this session. By selecting an organization, you are logging in as an authorized user of the organization and will be able to perform work for only that organization. For the purpose of this lesson, select Individual.



Select Your Organization

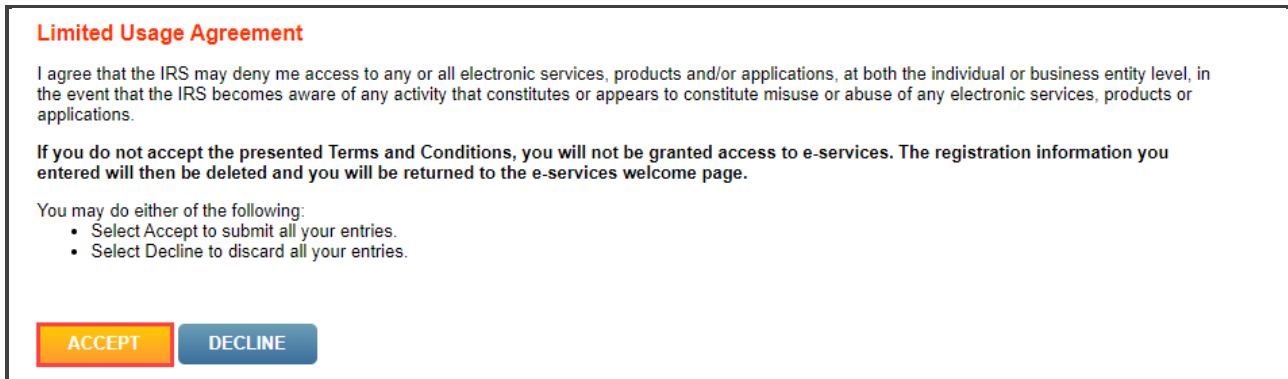
Select the organization you will represent in this session. Each item below represents an organization for which you are authorized to perform work. By selecting an organization, you are logging in as an authorized user of that organization and will be able to perform work for only that organization. You may represent yourself by selecting Individual. You may filter organizations to narrow down the choices based on matching text.

Individual

Select "Individual" to represent yourself as an individual. No organization-specific authorizations will be granted.

Individual

27. IRS displays the Terms of Service. Read the terms and at the bottom of the page, select **Accept** to submit all your entries.



Limited Usage Agreement

I agree that the IRS may deny me access to any or all electronic services, products and/or applications, at both the individual or business entity level, in the event that the IRS becomes aware of any activity that constitutes or appears to constitute misuse or abuse of any electronic services, products or applications.

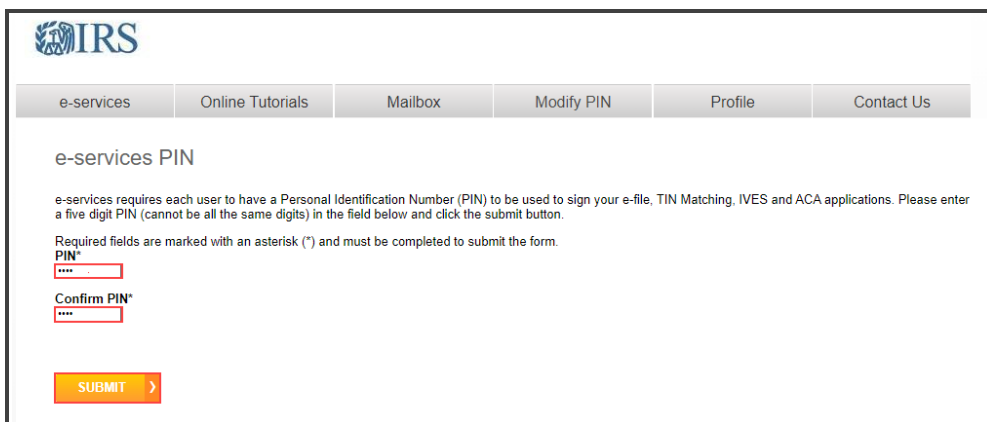
If you do not accept the presented Terms and Conditions, you will not be granted access to e-services. The registration information you entered will then be deleted and you will be returned to the e-services welcome page.

You may do either of the following:

- Select Accept to submit all your entries.
- Select Decline to discard all your entries.

ACCEPT **DECLINE**

28. On the e-Services PIN page, enter and rekey to confirm your 5-digit PIN, and click, Submit.



IRS

e-services Online Tutorials Mailbox Modify PIN Profile Contact Us

e-services PIN

e-services requires each user to have a Personal Identification Number (PIN) to be used to sign your e-file, TIN Matching, IVES and ACA applications. Please enter a five digit PIN (cannot be all the same digits) in the field below and click the submit button.

Required fields are marked with an asterisk (*) and must be completed to submit the form.

PIN*

Confirm PIN*

SUBMIT >

29. You receive a confirmation message that you are now at the External services Authorization Management Web Application.