



# Setup your ID.me Account & IRS Form 2848

**Who are you? Who, who, who, who?** – Pete Townshend, The Who

Setting up your ID.me account and navigating IRS security steps may feel like red tape, but doing it online is the fastest way to get things moving. Once you're verified, everything from authorizations to tax transcripts becomes quicker and far less frustrating. Here's the simple, step-by-step path to get your ID.me set up and approve your digital Form 2848 (Power of Attorney) from your tax advisor.

## Part 1: How to Set Up Your ID.me Account for the IRS

ID.me is the secure identity-verification system the IRS uses to confirm you are really you. Getting set up only takes a few minutes, and once you're verified, future IRS logins and authorizations become much faster. You'll need a smartphone, an email address, and a valid photo ID (driver's license, state ID, or passport).

1. Go to the IRS Website: <https://www.irs.gov/payments/your-online-account> and click the "Sign in to your Online Account" button.
2. Create an Account: Click the button to "Create an account with ID.me."
3. Enter Login Credentials: Enter your email address and create a strong password. You will immediately receive an email from ID.me. Click the link in that email to confirm your address.
4. Set Up Multi-Factor Authentication (MFA): Choose how you want to receive your security codes moving forward (text message, phone call, or an authenticator app) and enter the code sent to you to secure your account.
5. Verify Your Identity: You will have two options here:
  - a. Self-Service (Fastest): You will be prompted to take a clear photo of your government ID (front and back) using your smartphone. Afterward, it will prompt you to take a "video selfie" by scanning your face with your phone's camera to match it to the ID.
  - b. Video Chat Agent: If the self-service option fails or you prefer to speak to a human, you can wait to do a brief video call with an ID.me "Trust Referee" who will look at your documents over the camera.
6. Enter Your SSN: You will be prompted to enter your Social Security Number to finalize the verification.
7. Allow Access: Once verified, you will see a screen asking if you consent to share your verified identity data with the IRS. Click "Allow and continue."

Once your identity is verified and you've granted ID.me permission to share your information with the IRS, your account is ready to use. That means you can now approve authorizations, view your tax records, and securely interact with the IRS online.

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## Part 2: How to Accept Form 2848 from Your Tax Advisor

Now that your ID.me account is active, the next step is approving your tax advisor's digital Form 2848. This authorization allows us to access your IRS transcripts and communicate with the IRS on your behalf – and doing it online is far faster than the old paper process.

1. Log In: Go back to <https://www.irs.gov/payments/your-online-account> again and sign in using your new ID.me credentials.
2. Navigate to Authorizations: Once you are on your account dashboard, look for the "Authorizations" tab (usually located on the main menu or on your profile page).
3. Find the Pending Request: Look for a section labeled "Pending Authorizations." You should see the request submitted by your tax professional sitting there waiting for your approval.
4. Review the Details: Click on the request to review it. Verify that your tax advisor's name is correct and check the tax years and tax matters they are requesting access to.
5. Sign and Submit: If everything looks good, simply check the box to electronically sign the document and click "Submit." Because you are doing this through the IRS Tax Pro Account system, the authorization is usually recorded into the IRS database (the CAF system) almost immediately. Let your tax advisor know once you've clicked submit so they can get to work!

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## The Bottom Line: A Few Minutes Now Saves Hours Later.

Setting up your ID.me account and approving your Form 2848 may feel like one more thing on your to-do list, but it's the fastest way to give your tax advisor secure access to your IRS records. Once your identity is verified, future authorizations and IRS interactions become much quicker and far less frustrating.

If you run into any issues or aren't sure whether your authorization went through, we're here to help you get everything connected so your tax work can move forward smoothly. **Questions about ID.me or Form 2848? We're here to make it simple.**



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