
Subject: Basics - ID.me info
Date: Friday, December 12, 2025 at 3:01:06 PM Eastern Standard Time
From: support@cpehours.com
To:
Attachments: image.png, *Part 7_Working with IRS Electronically.pdf

Here is Kristy's handout from September that may be helpful. Also, you can go to the IRS site (quoted in the attachment) - https://www.id.me/government?state=federal&utm_source=hc&utm_medium=signintoirs&utm_campaign=article&utm_content=govhub

Tax Pro Account - <https://www.irs.gov/tax-professionals/tax-pro-account>



Steps to Connect:

- 1 Select "Connect with ID.me".
- 2 Select "Sign in to Tax Pro Account".
- 3 Select "Sign in with ID.me" if you already have an ID.me account.
- 4 If you do not have an account, select "Create an Account" to create and verify your ID.me account.
- 5 Done! Your ID.me login and IRS profile are now connected. You can proceed to retrieve your IP PIN.

 [Connect with ID.me](#)

How to Create an ID.me Account for Your IRS Tax Pro

Account

1. Go to the correct IRS page

- Visit: <https://www.irs.gov/tax-professionals>
- Click **Tax Pro Account**.
- Select **Sign in with ID.me**.

2. Start the ID.me sign-in

- Choose **Create an ID.me account**.
- Enter your **email** and create a **new password**.
- Confirm via the verification email ID.me sends.

3. Secure your account

ID.me forces multi-factor authentication. Pick one:

- Text message code
- Push notification through the ID.me app
- Phone call
- Hardware security key
- Backup codes

You must enable at least one MFA method to continue.

4. Verify your identity

You'll see two options:

- **Self-service upload** (fastest)
- **Video call with an agent**

For self-service, you'll need:

- Your **driver's license** or **passport**
- A **mobile phone** with a camera

- A **selfie** to match the ID
- Social Security number entry

You must pass the ID match before the IRS will let you access your Tax Pro Account.

5. Authorize sharing with the IRS

After verification, ID.me will show a consent screen:

- Click **Allow** to share your verified identity with the IRS.
- You'll be redirected back to the IRS Tax Pro Account login.

6. Sign into your Tax Pro Account

Once redirected:

- Choose **Continue with ID.me**
 - You'll log in using the email/password + MFA you just created.
 - You now have access to your Tax Pro Account dashboard (client authorizations, transcripts, notices, CAF, etc.).
-

Quick checklist you can give clients

- Valid email
- Mobile phone with camera
- Driver's license or passport
- Social Security number
- Ability to take a selfie

Best, Sean..

Basics Support Team | www.cpehours.com | 800-664-8297