Starting Dec. 10, 2017, all e-Services users must register through a new, more rigorous identity proofing process called Secure Access.

This new process is not optional, on the part of the IRS or its online users. The IRS must make this change to meet federal information system standards. Additionally, cybercriminals increasingly are targeting tax professionals to steal e-Services usernames and passwords, putting taxpayer data at risk.

In recent years, we authenticated each e-Services user individually. When you registered for e-Services, you were asked for your name, address, social security number, your date of birth, adjusted gross income and filing status. That limited amount of information no longer is enough to meet federal information system standards. Users will continue to be authenticated as individuals.

Here's how Secure Access helps –

- First, it strengthens the initial identity proofing process to make sure the person registering is who they say they are.

- Second, it strengthens security through a two-factor authentication process for returning users that helps prevent account takeover by cybercriminals. Two-factor authentication means you must have your credentials (username and password) plus a security code sent to your mobile phone or generated by your IRS2Go app each time you log in.

This is a one-time process. Once you have authenticated your identity and established a Secure Access account for e-Services, there is no further action required.

Steps You Must Take to Register

Any e-Services user who has not previously created a *Secure Access* account for **Get Transcript Online**, **Get an IP PIN**, online tax account, or through recent exception processing must validate their identity through this more rigorous process. This also includes all TIN Matching users and users who received Letter 5903 last December and authenticated by telephone.

Before starting the identity proofing process, you should review Secure Access: How to Register for Certain Online Self-Help Tools to learn what you will need to complete the process and how the process will work. You should also review FAQs: e-Services and Secure Access.

You will need to pass various identity proofing stages, including questions to confirm your email, tax return information, financial account information and mobile phone confirmation.

If you have a mobile phone associated with your name, you may complete the Secure Access process in one session. If you have all the available information, you can complete this process within 15 minutes. If you do not have a mobile phone associated with your name, you may request an activation code by mail, which will be delivered within five to 10 days. By using the activation code by mail feature, you also may return to register your IRS2Go App or any text-enabled mobile phone, including a business phone in a company name.

Alternative steps if you cannot authenticate online

If you are an existing e-Services user and you cannot successfully authenticate online, you have an option called exception processing by phone. You may call the IRS and a customer service representative will ask a series of questions related to your current and prior year tax return information including income information documents. For exception processing, call the e-Help desk at 1-888-841-4648 (select your language, then prompt 1 and remain on the line until an assistor picks up) 7:30 a.m. Eastern to 7 p.m. Eastern.

If you accurately answer all questions, an assistor will create a Secure Access account and issue a temporary password and an activation code by mail. This will allow you to return to e-Services registration and complete the process.

If you are unable to accurately answer the questions related to your tax information, you must make an appointment and visit a Taxpayer Assistance Center to verify your identity in person with two forms of government-issued identification. Once your identity is verified, you must again call the e-Help Desk, an account will be established and an activation code by mail issued to allow you to complete the process.

How to use the IRS2Go App

The IRS2Go app has a new "security" feature that will allow e-Services users to generate the second-factor security code to access accounts. The app can be downloaded for free from the Apple App Store, Google Play and Amazon. It can be installed on mobile devices such as smart phones and tablets, such as iPads, Samsung or Amazon Fire.

If your mobile apps do not update automatically, you may have to download IRS2Go again before you can see the "security" tab. The IRS2Go app option will assist those e-Services users who cannot use mobile phones in work areas or who may not have internet access.

Again, see Secure Access: How to Register for Certain Online Self-Help Tools (see below) for more details on the IRS2Go app.

UPDATE - New e-Services platform and landing page

The move to a new e-Services platform and a new landing page has been completed. All applications and tools for all users, including state users, are now available. During this transition period, there may be some performance issues. Additionally, you can no longer script the login process when accessing e-Services applications.

UPDATE - New e-Services User Agreement

As we make these changes to e-Services, we also will make changes to the e-Services User Agreement. We will notify you in advance when this user agreement is available.

To better protect taxpayers, the IRS recently upgraded its identity verification process for certain online self-help tools. The purpose is to prevent taxpayer impersonations and account takeovers by identity thieves. Because the Secure Access Authentication platform is more rigorous, it helps if you prepare to register in advance.

Currently, the Secure Access authentication process applies to Get Transcript Online, Get an IP PIN, e-Services and online tax account.

Here's what new users need to get started:

- 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:

    o credit card, or

    o home mortgage loan, or

    o home equity (second mortgage) loan, or

    o home equity line of credit (HELOC), or

    o car loan
      (The IRS does not retain this data)

- A readily available mobile device. For instant access, your name must be associated with a U.S-based mobile phone capable of receiving text messages. If the mobile phone number cannot be linked to your name, you may opt for a mailed activation code during registration.

Note:

If you have a "credit freeze" on your credit records through Experian, it must be temporarily lifted before you can successfully complete this process.

The credit card cannot be American Express, a debit card, or a corporate card issued in your name by your company or organization.

Because this process involves verification using financial records, there may be a "soft inquiry" placed on your credit report. This notice does not affect your credit score. The IRS does not retain your financial account information.

If you have a pay-as-you-go mobile phone or a business/family plan mobile phone not associated with your name, you may request that we mail an activation code to the address we have on file for you. To complete the registration process, you still must have either:

1) a text-enabled, U.S.-based phone to receive a security code via text or

2) the IRS2Go mobile application to receive a security code within the IRS2Go app.

If you have already created an account with Secure Access and need to change your phone number, you must re-register.

First-time users of any Secure Access-supported tool must:

- Submit name and email address to receive a confirmation code;

- Enter the emailed confirmation code;

- Provide SSN, date of birth, filing status and address on the last filed tax return;

- Provide some financial account information for verification such as the last eight digits of their credit card number or car loan number or home mortgage account number or home equity (second mortgage) loan number or home equity line of credit;

- Enter a mobile phone number to receive a six-digit activation code via text message OR request an activation code by mail (see below);

- Enter the activation code sent to mobile phone;

- Create username and password, create a site phrase and select a site image.

First-time users who opt for an Activation Code by Mail must:

- Complete the steps above through financial account information;

- On the mobile phone verification page, select "Receive an activation code by postal mail";

- Create username and password, create a site phrase, select a site image, and select secret questions;

- Allow 5 to 10 business days for mail delivery of the activation code;

- Return to the online service and enter your username and password;

- Enter the activation code at the prompt;

- Enter number for any type of text-enabled phone at the prompt (this may include a pay-as-you-go mobile phone or a business/family plan mobile phone not associated with your name); and/or select the option to receive a security code via the IRS2Go mobile application;

- Complete mobile device activation;

- Check mobile device for a security code;

- Enter the security code at the prompt to complete the Secure Access registration process.

Returning users with existing credentials but new to Secure Access must:

- Log in with an existing username and password;

- Submit financial account information for verification, for example, the last eight digits of a credit card number or car loan number or home mortgage account number or home equity (second mortgage) loan account number;

- Submit a mobile phone number to receive an activation code via text OR request an activation code by mail (see above).

Returning users who previously completed the Secure Access process must:

- Log in with an existing username and password;

- Receive a security code via mobile device provided during account set up;

- Enter the security code into secure access.

- You will need a security code each time you log into Secure Access.

Using the IRS2Go Mobile App to Receive a Security Code:

- The IRS2Go app is a mobile app that is available for Android smartphones, Android tablets, iPhones, iPads, and Amazon Fire tablets.

- IRS2Go offers the option to generate the security code needed for each login. There is a one-time registration process where your app-enabled device must be connected to the internet. After registering the mobile device, you do not need to be connected to the Internet to generate the security code via the IRS2Go app. To use the IRS2Go Security Code feature, the time on your mobile device must be accurate.

- There are two ways to select the IRS2Go option to receive the security code needed for each login.

    o The first way to register your IRS2Go app is you can ask for an activation code by mail. When you return to Secure Access and enter the activation code, you will have the option of receiving the security code via text or via the IRS2Go app. To register the app, select "set up a security code using IRS2Go mobile app."

    o The second way to register the IRS2Go app is if you've previously registered with a mobile phone linked to your name, you can add the IRS2Go app via your profile page after you have logged in. In the Security Code section, click "set up IRS2Go mobile app authentication."

- The IRS2Go app may only be connected to one account at a time. The app cannot support multiple Secure Access users.

- When you log into an IRS.gov application, you may remove and/or replace your IRS2Go device from your profile page. When replacing a mobile device, do not remove the IRS2Go app from your original device until you have set up the IRS2Go security code on your new device.