

HOW TO GUIDE

CAPTURING IRS USER ID IN THE API CONSENT PORTAL for AUTO LOGIN PROCESS THROUGH THS

THS users now have access to an IRS API login (A2A) which will allow THS users to register their installation of THS for auto login to the IRS for transcript delivery. Eliminating the constant need to verify e-Services credentials. This guide will explain how to obtain the necessary user ID to complete the auto login process.

NOTE: These instructions also apply to resetting UID for existing users as well.

Step 1

- Go to <https://la.www4.irs.gov/esrv/consent/>
 - Be sure to Copy and Paste Web Address as it appears.
 - Page will look like normal e-services login page



Sign In or Create a New Account

i New option for creating an account

In addition to creating an account with the ID.me self-service process, you can now create an ID.me account using a live video chat that does not require a selfie. All selfie and biometric data will be deleted automatically. See our [IRS statement](#) for more details.

If you have an existing IRS username, please create a new ID.me account as soon as possible. We're bringing you an improved sign-in experience.

If you're a new user, please create an account with ID.me. You can also sign in with an existing ID.me account.

ID.me is our trusted technology provider in helping to keep your personal information safe.

Create a new account

ID.me Create an account

OR

Sign in with an existing account

Sign in with **ID.me**

Sign in with an existing IRS username

The IRS is not requiring the transition to ID.me currently. Legacy credentials should work for foreseeable future.

You can log in with either set of credentials. The screenshots will be using legacy credentials but they should look similar.



Sign Up

Don't have an account? Create one now.

CREATE ACCOUNT >

Log In

Already have a username? Welcome back!

Username

LOG IN >

[Forgot Username](#)

PTIN and FIRE users need a separate account in this system

Step 2

- Enter E-services Credentials as normal
- Select Organization which has access to Transcript Deliver System (TDS)
- **DO NOT SELECT INDIVIDUAL!!! It never has access to TDS.**

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

Do not select Individual. It does not have access to Transcript Delivery System.

Firm Roles

Select a Firm to represent your organization across all locations.

Filter Firms

Filter by legal name or application type

Show 10 entries

Selection	Firm	Application Type
Select	Audit Detective, LLC	eFile
Select	Roger Nemeth	eFile
Select	SUNSHINE TAX SOLUTIONS, LLC	eFile

Firm Roles show only if you are the Primary or Responsible person on the EFIN. They have access but we recommend you use Organization Roles below.

Showing 1 to 3 of 3 entries

Previous 1 Next

Organization Roles

Select an Organization to represent a specific role for your organization's location.

Filter Organizations

Filter by business name, address, or application type

Show 10 entries

Selection	Organization	Application Type
Select	Audit Detective, LLC, 123 Main St, Havana, FL 32333	API eServices
Select	Roger W Nemeth, 123 Main St, HAVANA, FL 32333	eFile
Select	Sunshine Tax Solutions, 123 MAIN ST, HAVANA, FL 32333	eFile
Select	Tax Help Software, 123 Main St, Havana, FL 32333	API eServices

You should select Organization Roles. Not all Organizations have Transcript Access so there may be some trial and error.

Showing 1 to 4 of 4 entries

Previous 1 Next

Step 3A

- Select API Consents to check for existing authorizations.

IRS API Authorization Management

Welcome to the IRS API Authorization Management Web Application. Please select Review to view or revoke existing API Consents. Select Setup to Grant Access for a A2A Client ID.

API Consents

View and/or Revoke the API Client IDs you have granted access

[Review](#)

A2A Setup

Setup A2A authorizations for your user account and your organization's Client ID

[Setup](#)

Step 3B

- THS Authorizations will have the following Client ID:
 - 6cc6d990-c3cd-4e5a-97f2-4fd5cc7105c1

API Authorization Consents

To revoke access use the revoke link for a given API Client ID.

API Client ID	API Access Type	API Environment	Consent Status	Last Update Date	Action
6cc6d990-c3cd-4e5a-97f2-4fd5cc7105c1	A2A Authorization	PROD	ACTIVE	8/2/22 11:06 AM	Revoke
6cc6d990-c3cd-4e5a-97f2-4fd5cc7105c1	3rd Party App Authorization	PROD	ACTIVE	1/26/22 10:20 AM	Revoke

This is what the A2A Authorization looks like. If it is "ACTIVE" then revoke it. A2A = Auto Login

3rd Party App Authorization relates to Manual Login Method and does not apply to A2A (Auto Login).

- After Revoking return to Main Screen

The screenshot shows the top of the IRS website with the IRS logo on the left. Below the logo is a dark blue navigation bar with the text "Home / API Consents" in white. A red arrow points from a text box to the "Home" link. Below the navigation bar is a light gray header area with the text "API Authorization Consents" in dark blue.

Click "Home" to return to Main Screen

Home / API Consents

API Authorization Consents

Step 3C

- Select A2A Setup:

IRS API Authorization Management

Welcome to the IRS API Authorization Management Web Application. Please select Review to view or revoke existing API Consents. Select Setup to Grant Access for a A2A Client ID.

API Consents

View and/or Revoke the API Client IDs you have granted access

[Review](#)

A2A Setup


Setup A2A authorizations for your user account and your organization's Client ID

[Setup](#)

Step 4

- Enter THS Client ID:
 - **6cc6d990-c3cd-4e5a-97f2-4fd5cc7105c1**
- Select “**PROD**” for A2A Environment
- Click “Grant Access”

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Home / A2AAuthorization

A2A Authorization

Setting up A2AAuthorization will allow A2A processes to access IRS e-Services data on your behalf. By granting this access the A2A client ID will have the ability to run the following types of transactions on your behalf:

- Request Client Transcripts
- Perform TIN Matching request
- Retrieve messages from your Secure Object Repository (SOR)

Impact of granting access

If you choose to grant the software product access to your e-Services data, you also agree to provide the IRS upon request with the name and contact information of the software product. If you use the services of a software product and there are reasonable grounds to suspect the software product is not following required security practices and protecting taxpayer information from unauthorized disclosure, misuse, alteration, destruction, or is otherwise compromising the integrity of the data, the IRS has the right to suspend or terminate your account and refuse all current or future use of e-Services.

It is the legal responsibility of government, businesses, organizations, and individuals that receive, maintain, share, transmit, or store taxpayers' personal information to safeguard taxpayer data. Taxpayer data is defined as any information that is obtained or used in the preparation of a tax return (e.g., income statements, notes taken in a meeting or recorded conversation, IRS transcripts). Putting safeguards in place to protect taxpayer information helps prevent fraud and identity theft and enhances customer confidence and trust.

All e-Services users should refer to Publication 4557, Safeguarding Taxpayer Data: A Guide for Your Business, on www.irs.gov for more information about your responsibilities for safeguarding taxpayer data and to learn more about developing a security program. Many federal, state, city, and local government laws and regulations are in place to safeguard taxpayer data. Failure to adhere to your responsibilities for safeguarding taxpayer data may subject you to legal action.

Your responsibility

You are responsible for all activities that occur under your account. **To prevent unauthorized access ensure access is granted to trusted organizations.** We reserve the right at any time, with or without notice, to require a change to or revoke any username, password, and/or PIN created by you. You are responsible for protecting and keeping any confidential information you access through e-Services.

A2A Client ID ⓘ

A2A Environment ⓘ

Step 5

- Copy the "Full User ID" (Also know as the UID) (example format USERNAME-1234567) and paste it into the THS screen to save it. Note the "USERNAME" portion of the UID will be your e-Services Username.
Note: You can have multiple UIDs and they may only be off by one number so make sure you copy this one exactly

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IRS

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Home / A2A Authorization / A2A Setup Complete

A2A Setup Complete

The A2A Client ID setup is complete. To revoke the access use Review on the Home page.

A2A Client ID 6cc6d990-c3cd-4e5a-97f2-4fd5cc7105c1 is now setup to run e-Services transactions on your behalf.

Please make note you will need to give your full user ID to your A2A process owner.

Full User ID: USERNAME-1234567

Ok

If you get the following error return to Step 3A by clicking on the "Home" link at the top of this page. You will have to revoke and re request authorization to get UID.

There is 1 Error on the page

- Access has already been granted for this Client ID and A2A Environment.

A2A Authorization

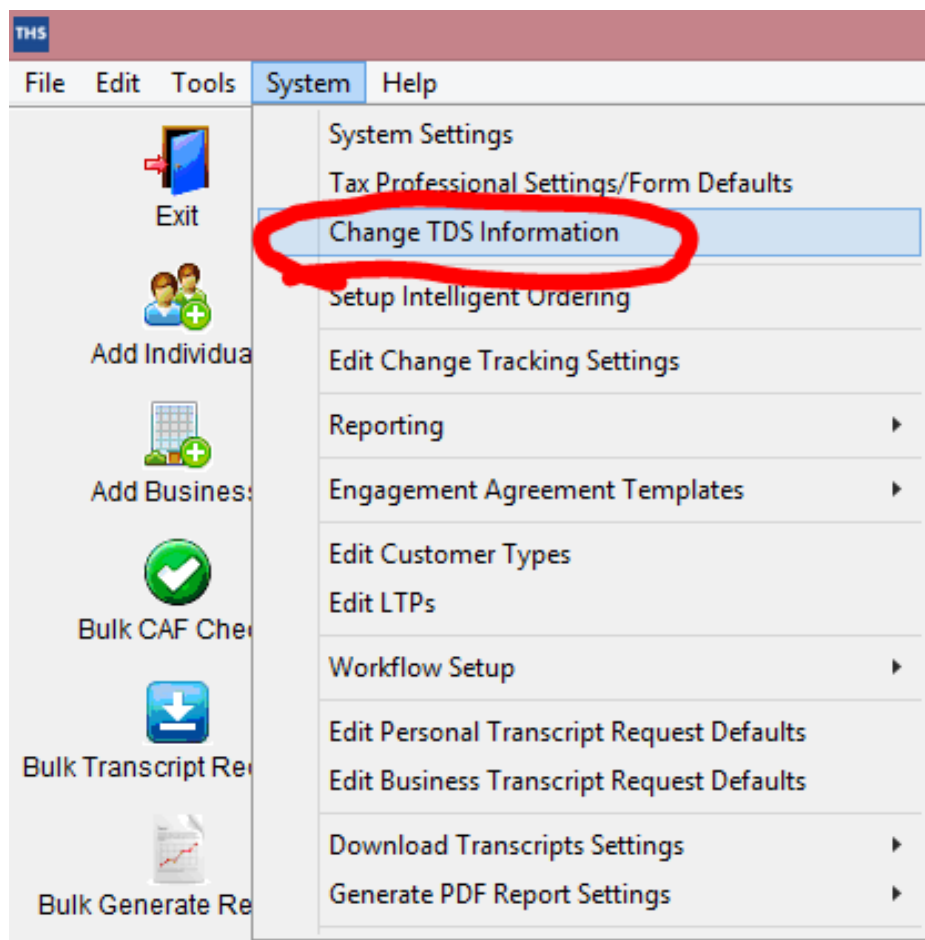
Setting up A2A Authorization will allow A2A processes to access IRS e-Services data on your behalf. By granting this access the A2A client ID will have the ability to run the following types of transactions on your behalf:

- Request Client Transcripts
- Perform TIN Matching request

Step 6

- Log Into THS to enter the UID (UID Format = USERNAME-1234567) and Complete the Process.
- New Users should already see the input screen their initial login (See next page for screen shot).
- Existing users can input their Auto Login UID by clicking System→Change TDS Information then selecting **Use Auto Login Method**

Step A (New Users skip to Step C)



Step B

THS Tax Pro User TDS Info

Tax Help Software

In order to save the THS Program Password you must enter your E-Services Credentials and verify an organization.

CAF #: (9 digits only) [redacted] To change CAF contact THS Support 404-910-3605 [redacted]

E-Services Organization: (eFile) Roger W Nemeth, [redacted]

Create/Change THS Password

THS Program Password: [redacted]

Confirm THS Program Password: [redacted]

Use Auto Login Method

OK Cancel

Check this box. If it says "Use Manual Login Method" DO NOT CHECK.

Then click OK to get to next screen.

THS Tax Pro User TDS Info

Tax Help Software

Follow the screen instructions in order to set up your IRS Transcript Delivery System integration with THS.

To change CAF contact THS Support 404-910-3605 [redacted]

CAF #: (9 digits only) [redacted]

E-Services Organization: UID - YOURUSERNAE-12345678

Use Manual Login Method

OK Cancel

If Use Manual Login Method is choice DO NOT CHECK IT!!!! Just click OK.

Step C (for both new and existing users)

This is the screen new users will see initially and existing users will navigate to in order add the UID:

This is a one time set up. Anytime you request transcripts through THS going forward there should be no need to login (unless the IRS changes the process in the future).

Remember your UID is your e-Services Username followed by a hyphen and then several digits.

Manually Enter UID

If you were already able to capture your UID from the IRS API Consent Portal. If not follow these instructions:

1. Goto <https://la.www4.irs.gov/esrv/consent/>
2. Enter your IRS Credentials and make sure you select an organization that has access to IRS Transcript Delivery System.
3. Select A2A setup.
4. Enter THS Client ID = 6cc6d990-c3cd-4e5a-97f2-4fd5cc7105c1
5. Select PROD for A2A Environment.
6. Click Grant Access.
7. Copy the "Full User ID:" (example format USERNAME-1234567)
8. Enter IRS UID into the box below on this form and submit.

That is it your Auto Login in your THS install is set up on your local install.

Enter UID Here:

Cancel Submit

Open PDF Instructions With Screenshots