

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.

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 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.**

 **Internal Revenue Service**
United States Department of the Treasury

Select 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. You will be able to perform work for only that organization.

Individual

Doggies, 2002 Randolph Road , Greenbelt , MD , 20770

BETTY PINK ESTATES

TRADE WINDS DRIVERS, 123 E ST , LANHAM , MD , 20706

lois LEBORING

MY HANDS ARE TIED

ACTION TAX, 5000 LANHAM DRIVE , LANHAM , MD , 20706

PFPC GLOBAL FUND SERVICES, 7900 tds state application lane , lanham , MD , 20706

Submit Selected Organization

[e-Services Privacy Policy](#)

Step 3

- Select A2A setup

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IRS

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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 / A2A.Authorization

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
- 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.

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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.

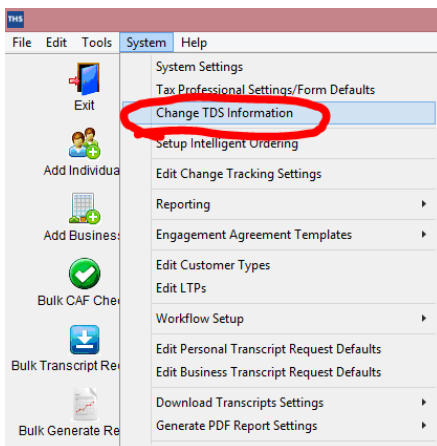
Full User ID: USERNAME-1234567

Ok

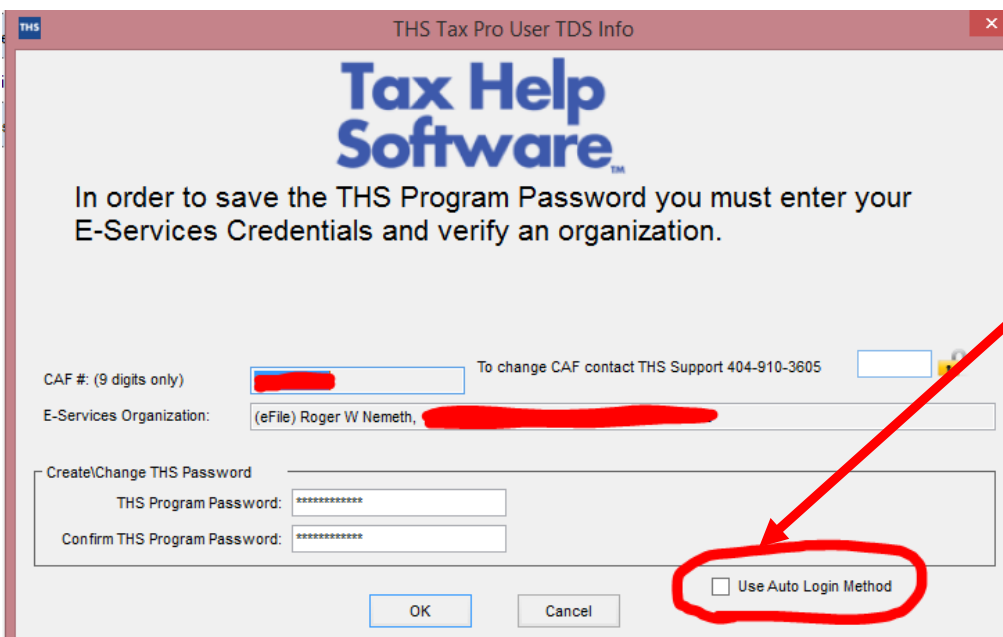
Step 6

- 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 1 (New Users skip to Step 3)



Step 2

A screenshot of the 'THS Tax Pro User TDS Info' dialog box. The window title is 'THS Tax Pro User TDS Info'. The main text reads: 'Tax Help Software. In order to save the THS Program Password you must enter your E-Services Credentials and verify an organization.' Below this, there are input fields for 'CAF #: (9 digits only)', 'E-Services Organization:', 'THS Program Password:', and 'Confirm THS Program Password:'. The 'Use Auto Login Method' checkbox is checked and circled in red. A red arrow points from a callout box to this checkbox. At the bottom are 'OK' and 'Cancel' buttons.

Check this
box

Step 3 (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