

How to Approve Authorizations for Form 8821 – Halcyon Within Xactus360

1. Once an email is received that an IRS Account Authorization is needed, click the link provided to sign in - <u>https://www.irs.gov/payments/your-online-account</u>.



2. Click Sign in to your online account.



3. Click Sign in with ID.me.

	IRS now offers a sign-in option with ID.me, which offers access to IRS online services with a secure account that protects your privacy.					
	ID.me is an account created, maintained, and secured by a technology provider.					
	If you don't have an ID.me account, you must create a new account.					
	Sign in with an existing account					
2	Sign in with D.me					
	OR					
	Create a new account					
	D.me Create an account					

4. Upon signing in, click the Authorizations dropdown and select Power of Attorney and Tax Information Authorizations.

MIRS					English ∨ 💄 Profile Help 🗗 🔂 Log			
Account Home	Account Balance	Payments \sim	Records and Status 🔨	Notices and Letters	Forms	Authorizations 🔨	\leftarrow	
Power of Attorney Information Author View, approve or re Power of Attorney Information Author	eand Tax prizations spect requests for (POA) or Tax rization (TIA)	Tax Re Author verifica	turn Transcript Authorizat ize, reject, or view income ition requests	ion				

5. Scroll down to Online Authorization Requests and click Approve/Reject next to the Pending request. You may notice the names of Elizabeth Boonin and James Mcgowan. These individuals are tax professionals working with Halcyon to help complete your request.

Online Authorization Requests				
Requests pending your acti	ion are deleted after 120 days. If a	request is deleted, ask	the requestor to send a r	new one to your account.
Requestor +	Date Requested 💲	Type ‡	Status ¢	Actions
Boonin, Elizabeth	08/31/2022	TIA	Approved	View
Boonin, Elizabeth	11/28/2022	TIA	Approved	View
Boonin, Elizabeth	11/30/2022	TIA	Approved	View
Mcgowan, James	11/16/2022	TIA	Pending	Approve/Reject
Mcgowan, James	11/28/2022	TIA	Pending	Approve/Reject

6. Check both boxes under the Sign and Submit section of the request. Then, click Approve Request.

CAF Number (7)	0315-23889	
Name	James Mcgowan	
Address	203 Low Court, Flemington, NJ, 08822	
Date Requested	November 16, 2022	
Tax Information		
Tax matter	Form 1040 Income Tax	
Tax Period(s)	2018 - 2025	
gn and Submit		
ou want to approve the request, che	ck both boxes and then select Approve Request.	
By checking this box, I authorize t	he designated individual to receive confidential information described in th	his tax information authorization.
and the second se	tion of notions. I declare that to the best of my knowledge and belief all the	a antered information is taus, correct, and completes

7. You will receive notification that the request has been approved.

Power of Attorney and Tax Information Authorizations
Tax Information Authorization Approved
Request Approved
James Mcgowan is authorized to receive your confidential tax information described in this authorization.

PLEASE LET US KNOW IF YOU HAVE ANY QUESTIONS OR CONCERNS AND WE WILL BE HAPPY TO HELP.