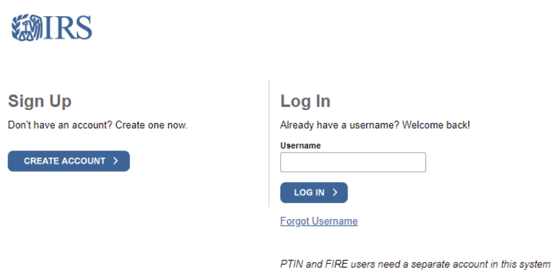
FEDERAL

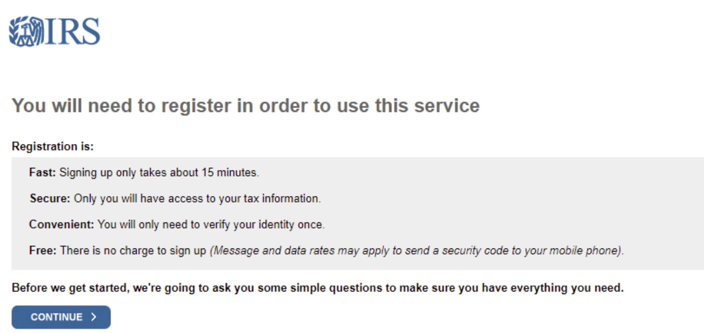
To begin using the IRS online services, taxpayers must first create an online account.

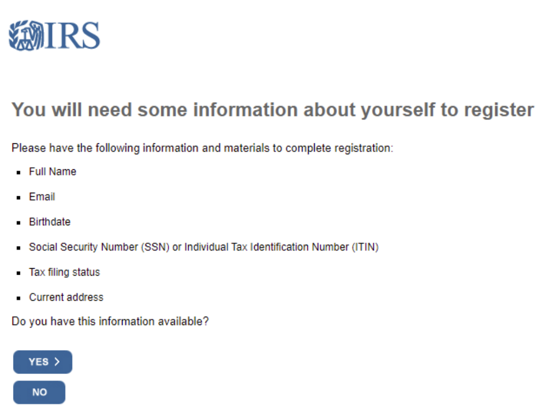
[Log In (irs.gov)](https://www.irs.gov)

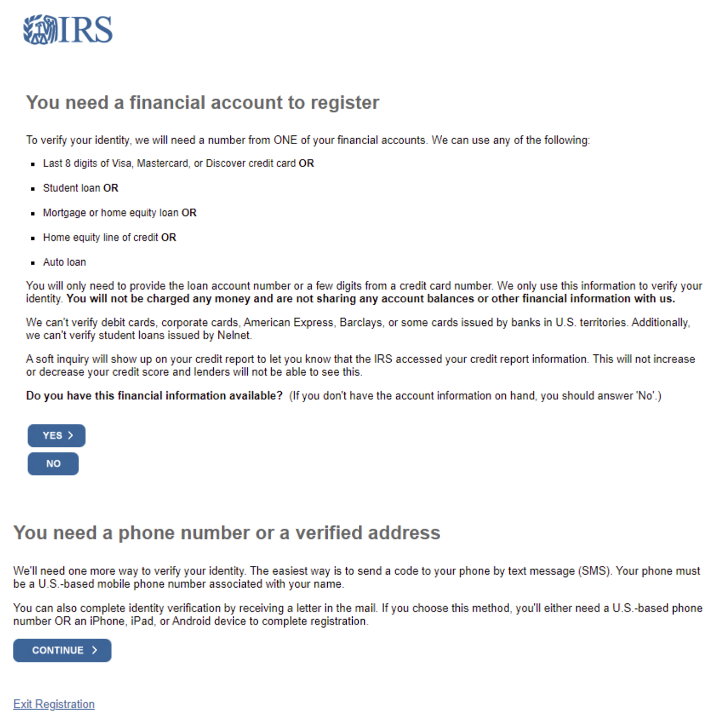
1. When navigating to the log in page for the first time, you will need to create an account.



2. There will next be a registration information screen and a list of what will be required to properly complete the registration.







You need a financial account to register

To verify your identity, we will need a number from ONE of your financial accounts. We can use any of the following:

- Last 8 digits of Visa, Mastercard, or Discover credit card **OR**
- Student loan **OR**
- Mortgage or home equity loan **OR**
- Home equity line of credit **OR**
- Auto loan

You will only need to provide the loan account number or a few digits from a credit card number. We only use this information to verify your identity. **You will not be charged any money and are not sharing any account balances or other financial information with us.**

We can't verify debit cards, corporate cards, American Express, Barclays, or some cards issued by banks in U.S. territories. Additionally, we can't verify student loans issued by Nelnet.

A soft inquiry will show up on your credit report to let you know that the IRS accessed your credit report information. This will not increase or decrease your credit score and lenders will not be able to see this.

Do you have this financial information available? (If you don't have the account information on hand, you should answer 'No'.)

YES >

NO

You need a phone number or a verified address

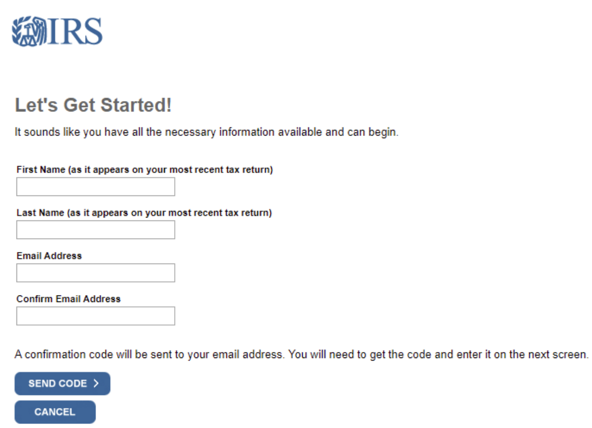
We'll need one more way to verify your identity. The easiest way is to send a code to your phone by text message (SMS). Your phone must be a U.S.-based mobile phone number associated with your name.

You can also complete identity verification by receiving a letter in the mail. If you choose this method, you'll either need a U.S.-based phone number OR an iPhone, iPad, or Android device to complete registration.

CONTINUE >

Exit Registration

3. After confirming that you have the above, you are then finally taken to the actual registration input form.



Let's Get Started!

It sounds like you have all the necessary information available and can begin.

First Name (as it appears on your most recent tax return)

Last Name (as it appears on your most recent tax return)

Email Address

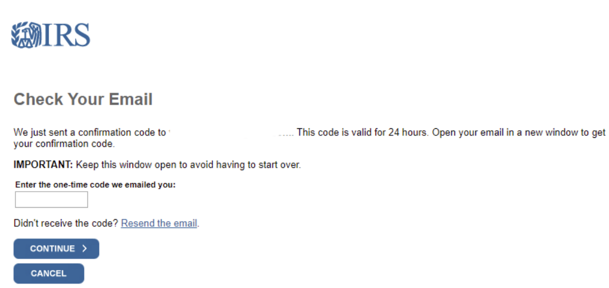
Confirm Email Address

A confirmation code will be sent to your email address. You will need to get the code and enter it on the next screen.

SEND CODE >

CANCEL

4. The code will be sent and entered on the following screen.



Check Your Email

We just sent a confirmation code to ..... This code is valid for 24 hours. Open your email in a new window to get your confirmation code.

IMPORTANT: Keep this window open to avoid having to start over.

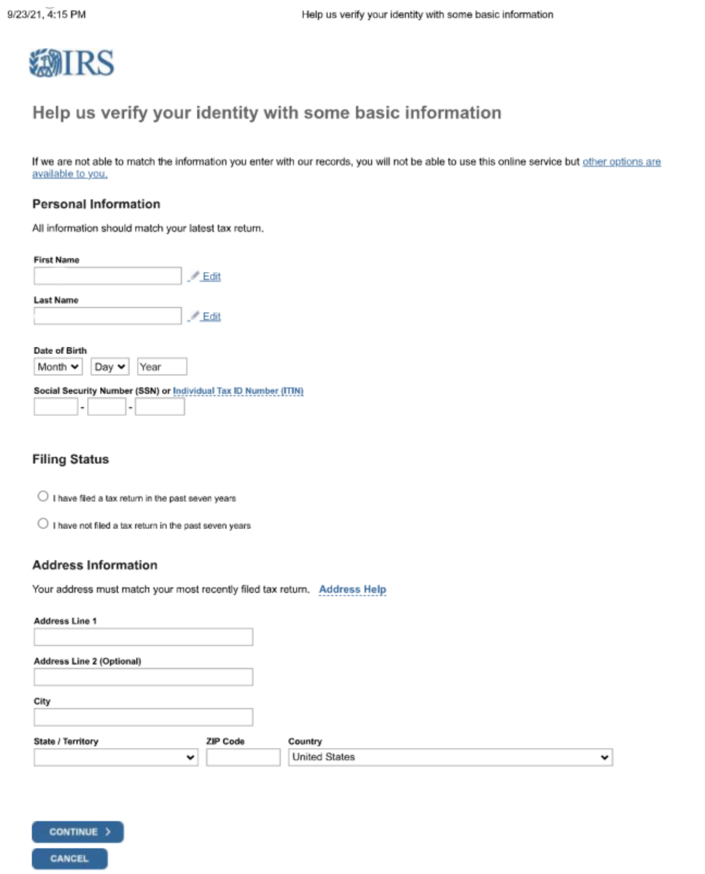
Enter the one-time code we emailed you:

Didn't receive the code? Resend the email.

CONTINUE >

CANCEL

5. Once your email is confirmed, you will then enter your basic user information.



9/23/21, 4:15 PM Help us verify your identity with some basic information

IRS

Help us verify your identity with some basic information

If we are not able to match the information you enter with our records, you will not be able to use this online service but other options are available to you.

Personal Information

All information should match your latest tax return.

First Name — Edit

Last Name — Edit

Date of Birth: Month | Day | Year

Social Security Number (SSN) or Individual Tax ID Number (ITIN)

Filing Status

- I have filed a tax return in the past seven years
- I have not filed a tax return in the past seven years

Address Information

Your address must match your most recently filed tax return. Address Help

Address Line 1

Address Line 2 (Optional)

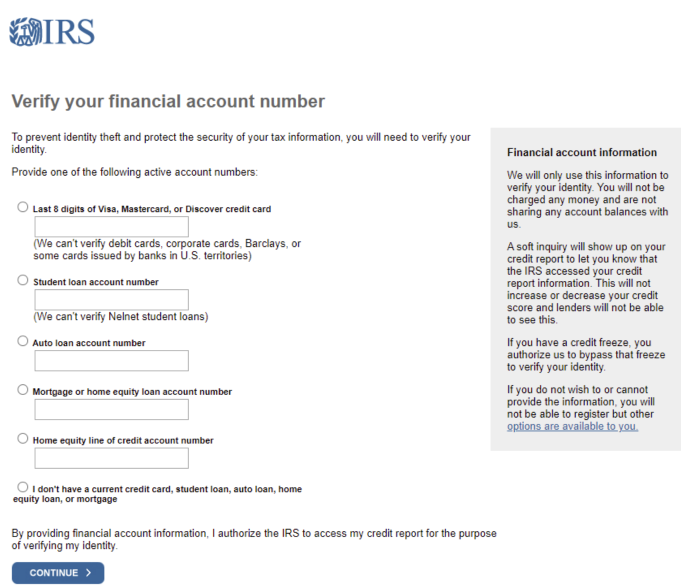
City

State / Territory | ZIP Code | Country: United States

CONTINUE

CANCEL

6. The next step is to verify your identity through a financial account.



IRS

Verify your financial account number

To prevent identity theft and protect the security of your tax information, you will need to verify your identity.

Provide one of the following active account numbers:

- Last 8 digits of Visa, Mastercard, or Discover credit card
  (We can't verify debit cards, corporate cards, Barclays, or some cards issued by banks in U.S. territories)
- Student loan account number
  (We can't verify Nelnet student loans)
- Auto loan account number
- Mortgage or home equity loan account number
- Home equity line of credit account number
- I don't have a current credit card, student loan, auto loan, home equity loan, or mortgage

Financial account information

We will only use this information to verify your identity. You will not be charged any money and are not sharing any account balances with us.

A soft inquiry will show up on your credit report to let you know that the IRS accessed your credit report information. This will not increase or decrease your credit score and lenders will not be able to see this.

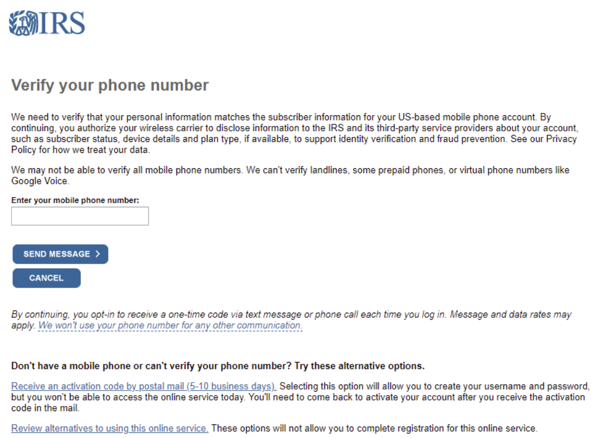
If you have a credit freeze, you authorize us to bypass that freeze to verify your identity.

If you do not wish to or cannot provide the information, you will not be able to register but other options are available to you.

By providing financial account information, I authorize the IRS to access my credit report for the purpose of verifying my identity.

CONTINUE

7. In addition, the IRS uses a mobile phone account as another source of verification.



IRS

Verify your phone number

We need to verify that your personal information matches the subscriber information for your US-based mobile phone account. By continuing, you authorize your wireless carrier to disclose information to the IRS and its third-party service providers about your account, such as subscriber status, device details and plan type, if available, to support identity verification and fraud prevention. See our Privacy Policy for how we treat your data.

We may not be able to verify all mobile phone numbers. We can't verify landlines, some prepaid phones, or virtual phone numbers like Google Voice.

Enter your mobile phone number:

SEND MESSAGE

CANCEL

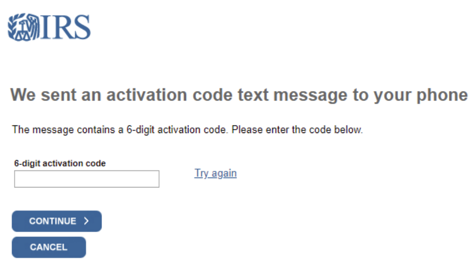
By continuing, you opt-in to receive a one-time code via text message or phone call each time you log in. Message and data rates may apply. We won't use your phone number for any other communication.

Don't have a mobile phone or can't verify your phone number? Try these alternative options.

Receive an activation code by postal mail (5-10 business days). Selecting this option will allow you to create your username and password, but you won't be able to access the online service today. You'll need to come back to activate your account after you receive the activation code in the mail.

Review alternatives to using this online service. These options will not allow you to complete registration for this online service.

8. A confirmation code will be sent and entered on the next screen to continue.



IRS

We sent an activation code text message to your phone

The message contains a 6-digit activation code. Please enter the code below.

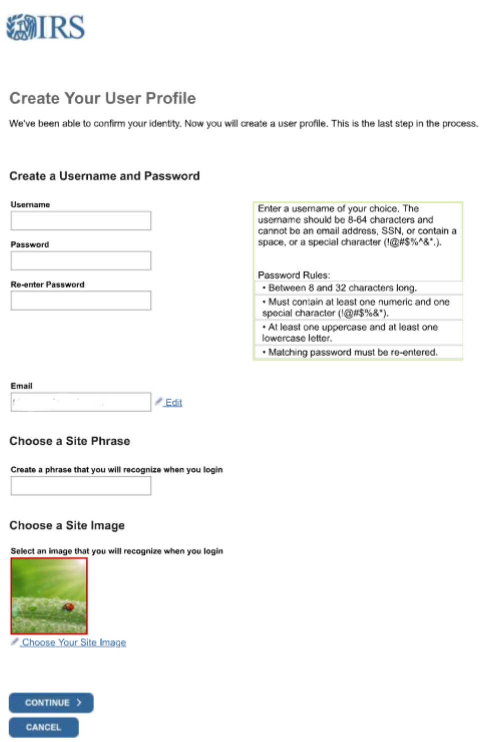
6-digit activation code

Try again

CONTINUE

CANCEL

9. Upon entering a valid code, you now set up your user profile.



IRS

Create Your User Profile

We've been able to confirm your identity. Now you will create a user profile. This is the last step in the process.

Create a Username and Password

Username

Password

Re-enter Password

Enter a username of your choice. The username should be 8-64 characters and cannot be an email address, SSN, or contain a space, or a special character (!@#$%^&*.).

Password Rules:
- Between 8 and 32 characters long.
- Must contain at least one numeric and one special character (!@#$%&*).
- At least one uppercase and at least one lowercase letter.
- Matching password must be re-entered.

Email

Edit

Choose a Site Phrase

Create a phrase that you will recognize when you login

Choose a Site Image

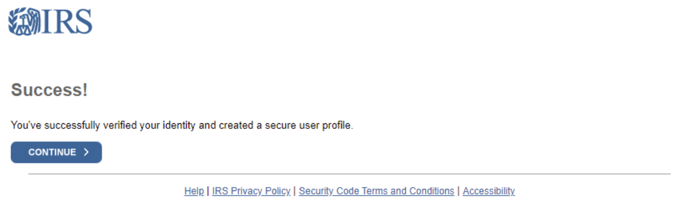
Select an image that you will recognize when you login

Choose Your Site Image

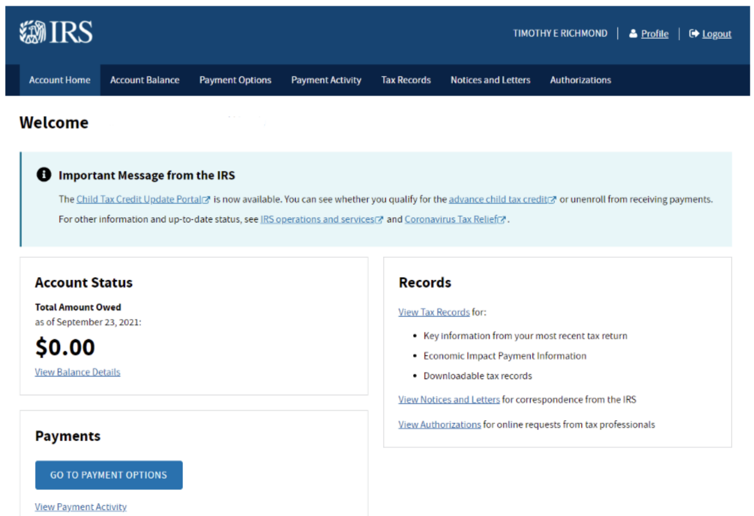
CONTINUE

CANCEL

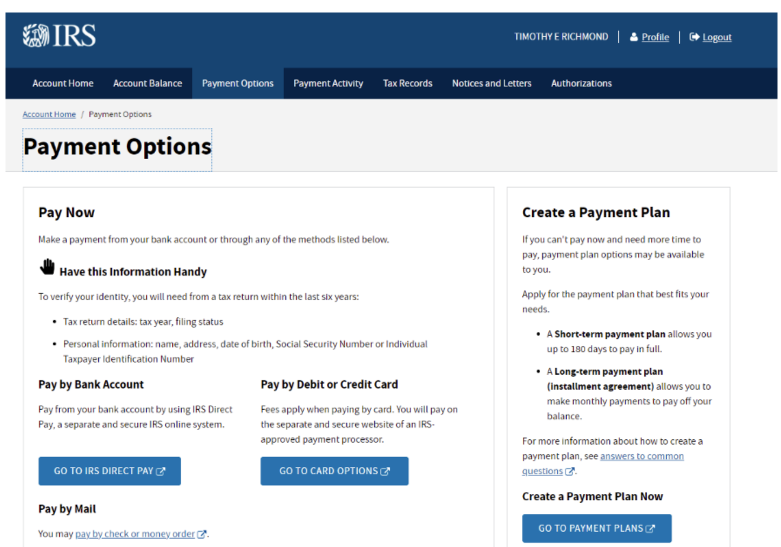
10. You have now successfully created the online account.



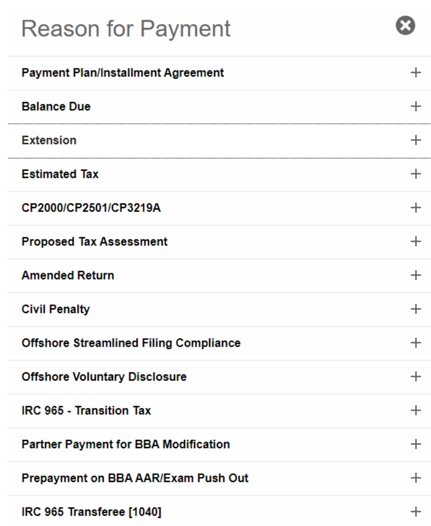
11. When you log in, the online options include Payment Options.



12. The payment options include via Direct Pay from a bank account or with a Debit/Credit Card. There is also a final user verification with a tax return from within the past six years.



13. Upon selecting the payment method, you are then enabled to enter the reason for the payment and other pertinent information.

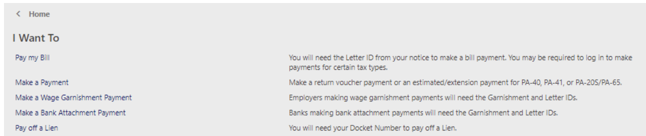


PENNSYLVANIA

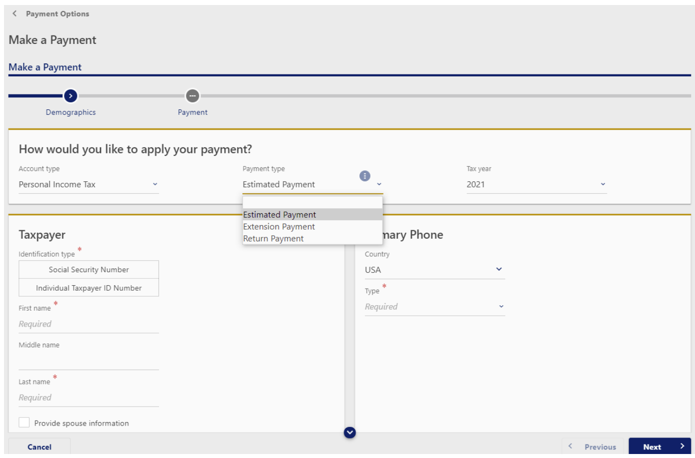
Pennsylvania will allow a taxpayer to make income tax payments without the creation of an online account.

1. Go to [https://mypath.pa.gov/ /.](https://mypath.pa.gov/) Under the Payments options, select Make a Payment.

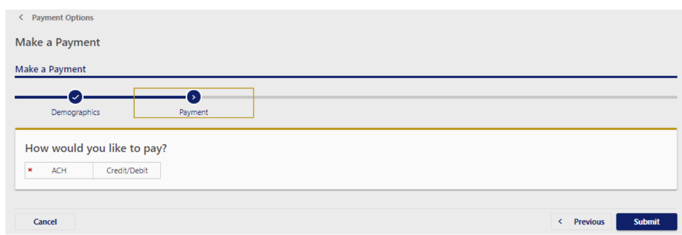
2. Under the Payments options, select Make a Payment.



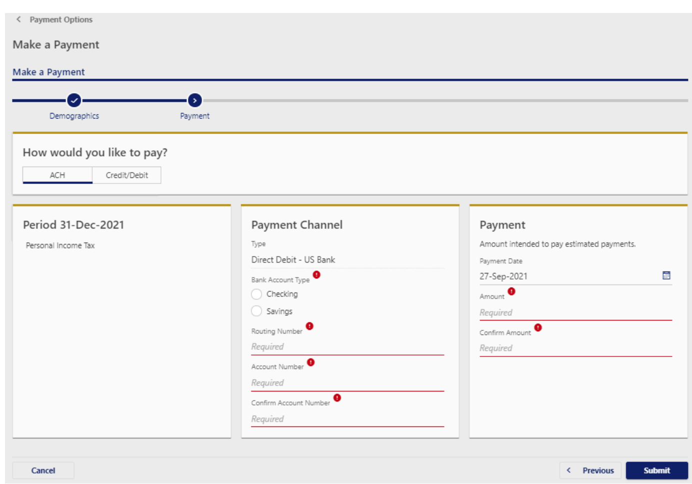
3. Select the income tax payment type and year. Fill in all the taxpayer required fields.



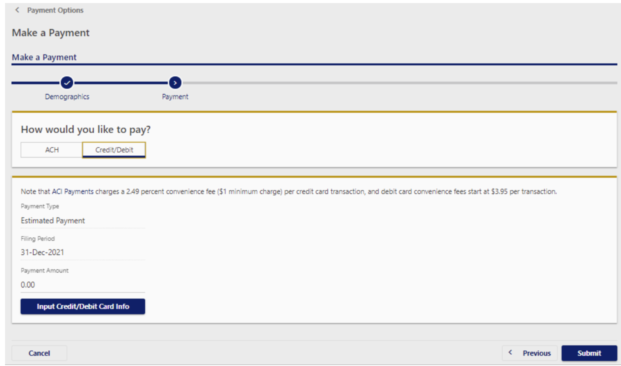
4. Complete the method of payment.



5. Choosing ACH requires the following information.

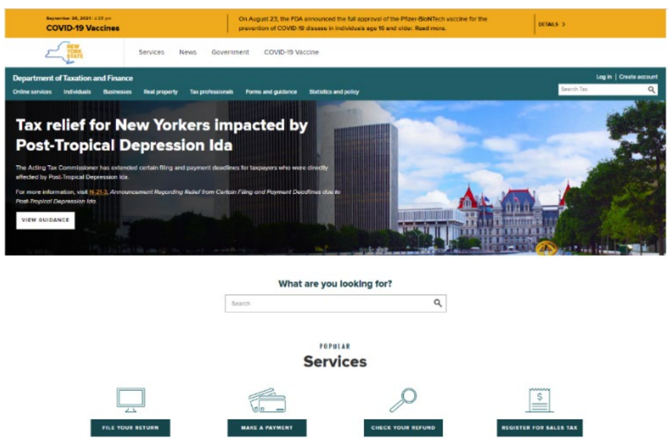


6. Choosing Credit/Debit the following information is needed.

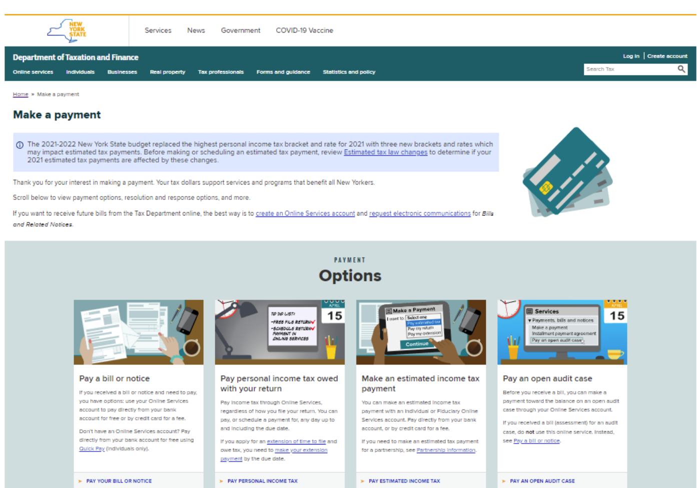


NEW YORK

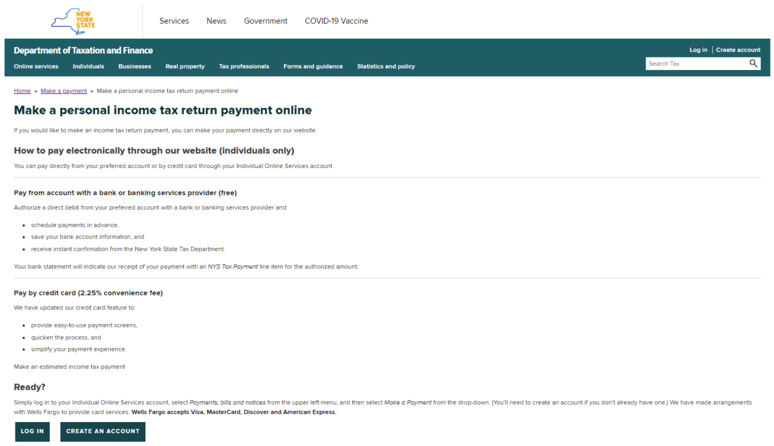
1. Navigate to the [Department of Taxation and Finance (ny.gov)]()



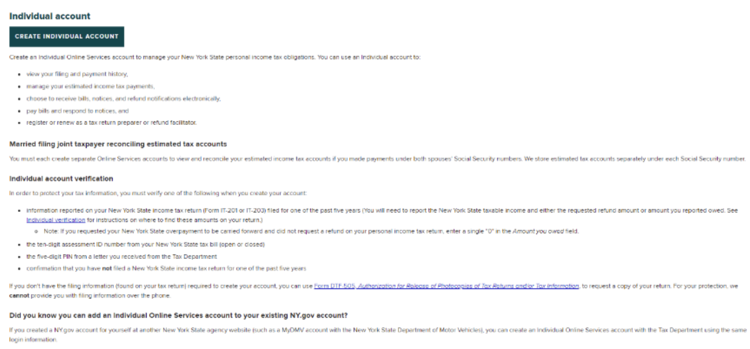
2. Select the Make a Payment option under Popular Services.



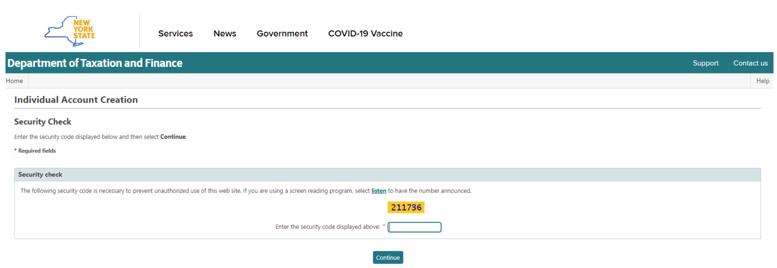
3. Selecting the Pay Personal Income Tax or Pay Estimated Income Tax options will take you to a specific instructions page. Regardless, after scrolling through some instructions, you will need to select create an account as a first-time user.



4. Similar to the account set up procedure for federal purposes, there is a verification process. For most taxpayers, the first criteria of the information on the NY state income tax return will be used.



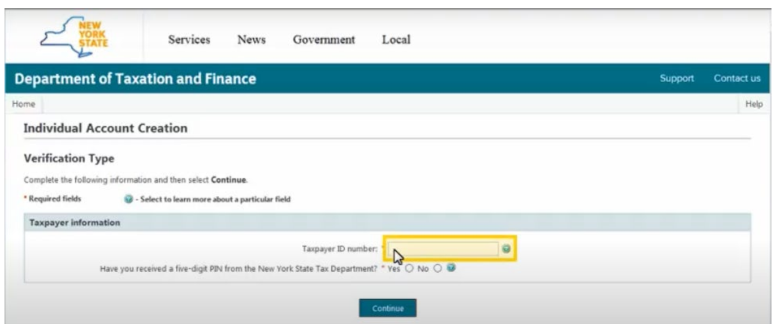
5. You will need to enter the Security check screen code and the taxpayer social security number.

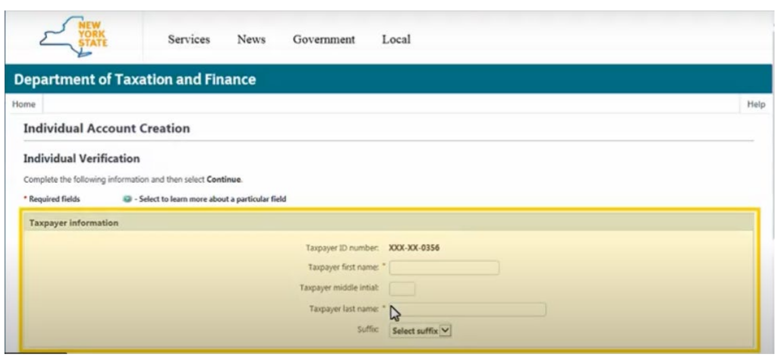


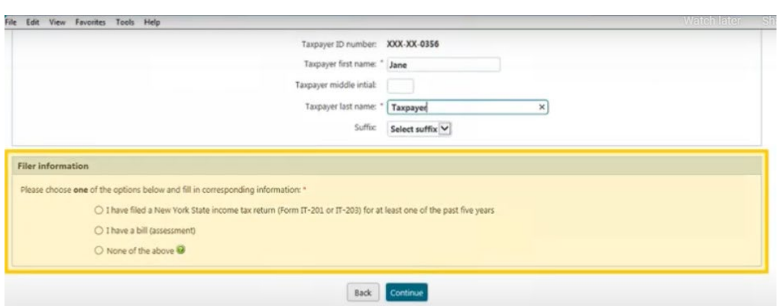
6. The New York State Department of Taxation and Finance has in-depth demonstrations of all things tax payment related available on YouTube. The link below provides the video of the above steps plus the final steps as seen in the following screen grabs.

[Online Services Individual Account Creation Demonstration]

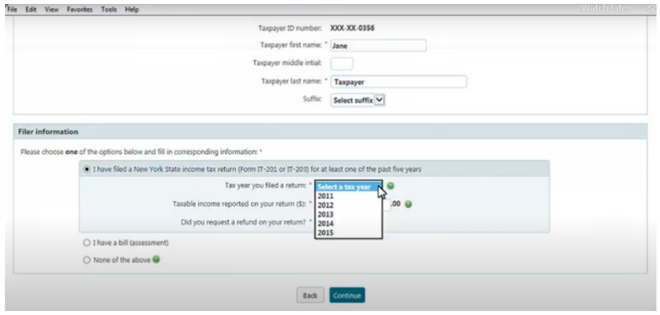
7. As seen on the clips from the Department demonstration, the taxpayer must first enter their social security number, name, and method of verification.



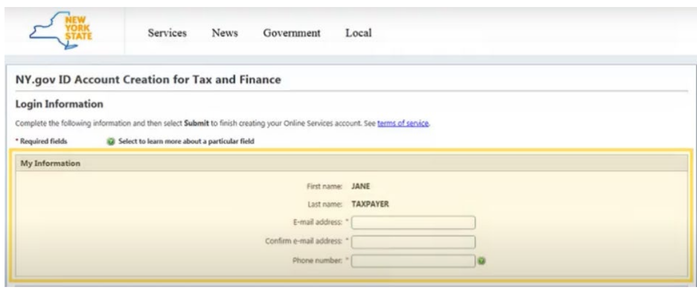


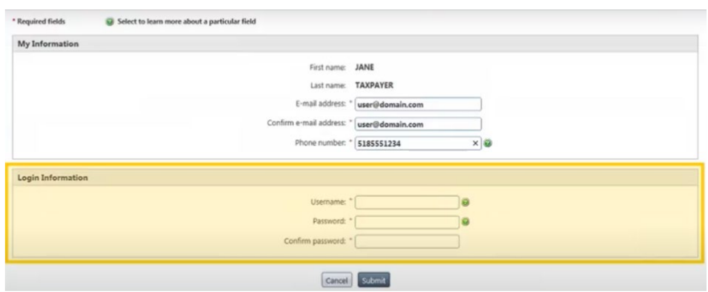


8. Upon selecting the New York State income tax return as the method, you will be asked to select the year and relevant information from the return.



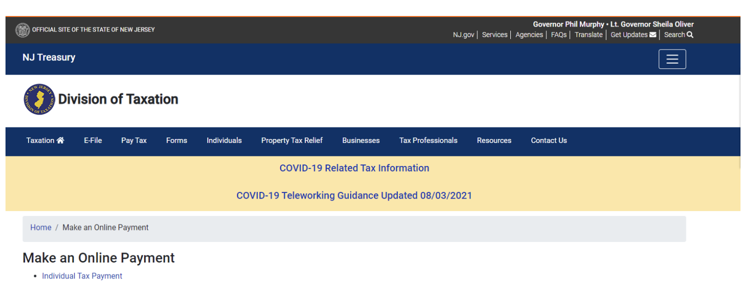
9. If successfully verified, you will then create you user and log in formation.



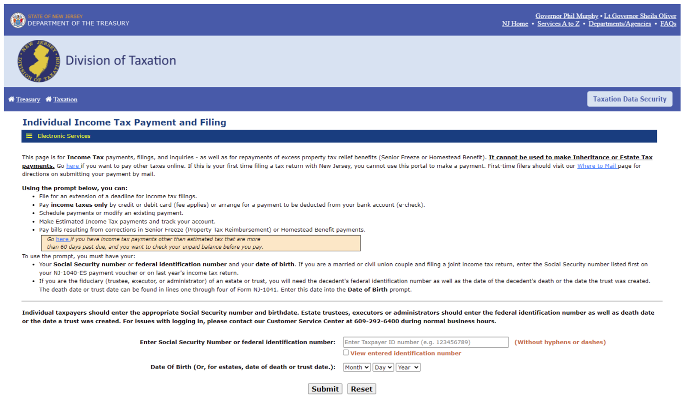


NEW JERSEY

1. To make an online payment to New Jersey, go to the Division of Taxation website. [NJ Division of Taxation - Make an Online Payment (state.nj.us)](). Select Make an Online Payment…Individual Tax Payment



2. At the bottom of the page, you will be required to enter the taxpayer social security number and date of birth.



3. The next page will allow you to select the tax payment being made. You also have the option to schedule future estimated tax payments