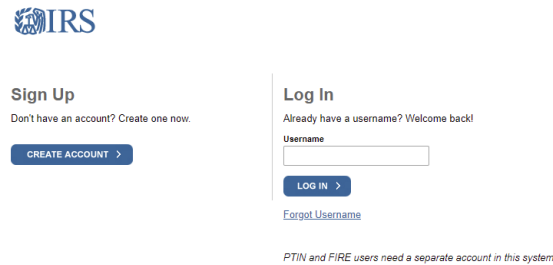


FEDERAL

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

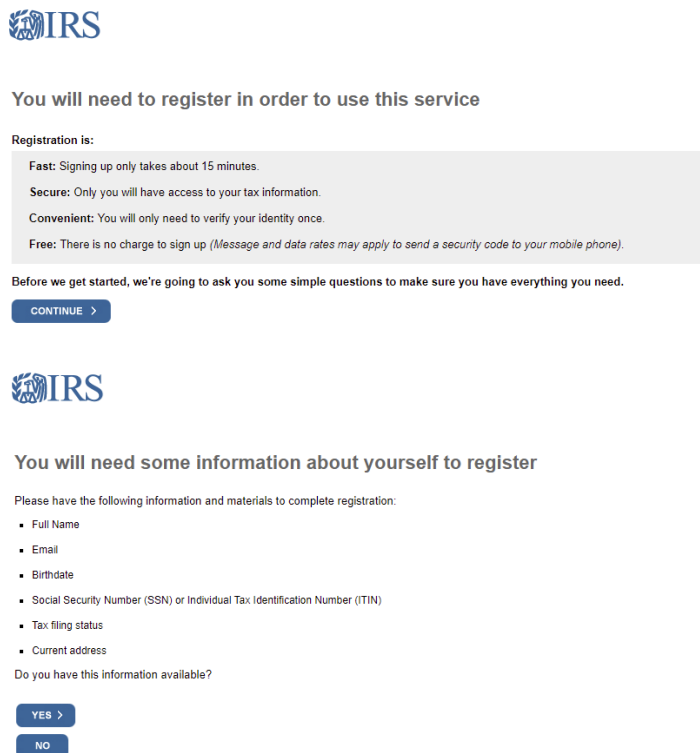
[Log In \(irs.gov\)](https://irs.gov)

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



The screenshot shows the IRS website's login interface. On the left, the 'Sign Up' section features the IRS logo, the heading 'Sign Up', and the text 'Don't have an account? Create one now.' Below this is a blue button labeled 'CREATE ACCOUNT >'. On the right, the 'Log In' section features the heading 'Log In' and the text 'Already have a username? Welcome back!'. Below this is a text input field for 'Username' and a blue button labeled 'LOG IN >'. A link for 'Forgot Username' is positioned below the login button. At the bottom of the page, a small note states: 'PTIN and FIRE users need a separate account in this system'.

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



The screenshot displays the IRS registration information screen. At the top, the IRS logo is shown. Below it, the heading 'You will need to register in order to use this service' is present. A section titled 'Registration is:' contains four bullet points: 'Fast: Signing up only takes about 15 minutes.', 'Secure: Only you will have access to your tax information.', 'Convenient: You will only need to verify your identity once.', and 'Free: There is no charge to sign up (Message and data rates may apply to send a security code to your mobile phone)'. Below this, a message states: 'Before we get started, we're going to ask you some simple questions to make sure you have everything you need.' A blue button labeled 'CONTINUE >' is located at the bottom of this section. The next section, also featuring the IRS logo, is titled 'You will need some information about yourself to register'. It begins with the text 'Please have the following information and materials to complete registration:' followed by a list of requirements: 'Full Name', 'Email', 'Birthdate', 'Social Security Number (SSN) or Individual Tax Identification Number (ITIN)', 'Tax filing status', and 'Current address'. Below the list, the question 'Do you have this information available?' is asked. At the bottom, there are two blue buttons: 'YES >' and 'NO'.



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

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](#)



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

[CONTINUE >](#)

[CANCEL](#)

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



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

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

[CONTINUE >](#)

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](#).

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



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.




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.



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.



Success!

You've successfully verified your identity and created a secure user profile.

[CONTINUE >](#)

[Help](#) | [IRS Privacy Policy](#) | [Security Code Terms and Conditions](#) | [Accessibility](#)

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

The screenshot shows the IRS online account dashboard for Timothy E. Richmond. The top navigation bar includes links for Account Home, Account Balance, Payment Options, Payment Activity, Tax Records, Notices and Letters, and Authorizations. The main content area is titled "Welcome" and features an "Important Message from the IRS" about the Child Tax Credit Update Portal. Below this, there are three main sections: "Account Status" showing a total amount owed of \$0.00 as of September 23, 2021, with a link to "View Balance Details"; "Records" with links to "View Tax Records" (listing key information, economic impact payment information, and downloadable tax records) and "View Notices and Letters" for correspondence; and "Payments" with a prominent "GO TO PAYMENT OPTIONS" button and a link to "View Payment Activity".

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.

The screenshot shows the "Payment Options" page on the IRS website. The top navigation bar is the same as the previous screenshot. The main heading is "Payment Options". Below this, there are two main columns. The left column is titled "Pay Now" and includes a section "Have this Information Handy" with a list of required information: tax return details (year, filing status) and personal information (name, address, date of birth, Social Security Number or Individual Taxpayer Identification Number). It then lists three payment methods: "Pay by Bank Account" (Direct Pay), "Pay by Debit or Credit Card", and "Pay by Mail". Each method has a corresponding "GO TO" button. The right column is titled "Create a Payment Plan" and explains that if a user can't pay now, payment plan options may be available. It lists two types of plans: a "Short-term payment plan" (up to 180 days) and a "Long-term payment plan" (installment agreement). It also includes a link to "answers to common questions" and a "Create a Payment Plan Now" button with a "GO TO PAYMENT PLANS" link.

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

Reason for Payment ✕	
Payment Plan/Installment Agreement	+
Balance Due	+
Extension	+
Estimated Tax	+
CP2000/CP2501/CP3219A	+
Proposed Tax Assessment	+
Amended Return	+
Civil Penalty	+
Offshore Streamlined Filing Compliance	+
Offshore Voluntary Disclosure	+
IRC 965 - Transition Tax	+
Partner Payment for BBA Modification	+
Prepayment on BBA AAR/Exam Push Out	+
IRC 965 Transferee [1040]	+

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/> Under the Payments options, select Make a Payment.

WARNING! BY ACCESSING AND USING THIS GOVERNMENT COMPUTER SYSTEM, YOU ARE CONSENTING TO SYSTEM MONITORING FOR LAW ENFORCEMENT AND OTHER PURPOSES. UNAUTHORIZED USE OF, OR ACCESS TO, THIS COMPUTER SYSTEM MAY SUBJECT YOU TO CRIMINAL PROSECUTION AND PENALTIES.

myPATH | PENNSYLVANIA TAX HUB

Username
Password
Log In

Do I need to sign up?
Forgot username or password?
New to myPATH? Sign Up

What are you looking for?

Payments
Electronically pay a bill, submit estimated and extension payments, make a return payment, and more...

- > Make a Payment
- > Track My Payments and Credits
- > Penalty & Interest Calculator

Individuals
Manage items for individuals.

- > File a PA Personal Income Tax Return for 2020
- > Take ID Verification Quiz
- > Verify 1099 Amount
- > Download Forms W-2G
- > File a PA Personal Income Tax Return for 2019

Registration
Register for new tax accounts.

- > Register New Entity

- Under the Payments options, select Make a Payment.

This screenshot shows the 'I Want To' menu with the following options: 'Pay my Bill', 'Make a Payment', 'Make a Wage Garnishment Payment', 'Make a Bank Attachment Payment', and 'Pay off a Lien'. To the right, there is explanatory text: 'You will need the Letter ID from your notice to make a bill payment. You may be required to log in to make payments for certain tax types.', 'Make a return voucher payment or an estimated/extension payment for PA-40, PA-41, or PA-205/PA-45. Employers making wage garnishment payments will need the Garnishment and Letter IDs.', 'Banks making bank attachment payments will need the Garnishment and Letter IDs.', and 'You will need your Docket Number to pay off a Lien.'

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

This screenshot shows the 'Make a Payment' screen with the 'Payment' step selected. The 'How would you like to apply your payment?' section shows 'Personal Income Tax' as the account type, 'Estimated Payment' as the payment type, and '2021' as the tax year. A dropdown menu for 'Payment type' is open, showing 'Estimated Payment', 'Extension Payment', and 'Return Payment'. The 'Taxpayer' section includes fields for 'Identification type' (Social Security Number, Individual Taxpayer ID Number), 'First name', 'Middle name', 'Last name', and 'Provide spouse information'. The 'Secondary Phone' section includes 'Country' (USA) and 'Type' (Required).

- Complete the method of payment.

This screenshot shows the 'Make a Payment' screen with the 'Payment' step selected. The 'How would you like to pay?' section shows 'ACH' as the selected method, with 'Credit/Debit' also available. The 'Cancel', 'Previous', and 'Submit' buttons are at the bottom.

- Choosing ACH requires the following information.

This screenshot shows the 'Make a Payment' screen with the 'Payment' step selected. The 'How would you like to pay?' section shows 'ACH' as the selected method, with 'Credit/Debit' also available. The 'Period 31-Dec-2021' section shows 'Personal Income Tax'. The 'Payment Channel' section shows 'Direct Debit - US Bank' as the selected type, with 'Bank Account Type' (Checking, Savings), 'Routing Number', 'Account Number', and 'Confirm Account Number' as required fields. The 'Payment' section shows 'Amount intended to pay estimated payments', 'Payment Date' (27-Sep-2021), 'Amount', and 'Confirm Amount' as required fields.

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

Payment Options

Make a Payment

Make a Payment

Demographics Payment

How would you like to pay?

ACH **Credit/Debit**

Note that ACH Payments charges a 2.49 percent convenience fee (\$1 minimum charge) per credit card transaction, and debit card convenience fees start at \$3.95 per transaction.

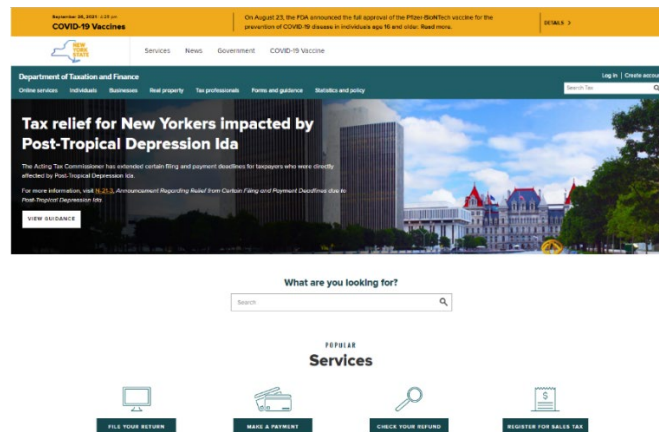
Payment Type
Estimated Payment
Filing Period
31-Dec-2021
Payment Amount
0.00

Input Credit/Debit Card Info

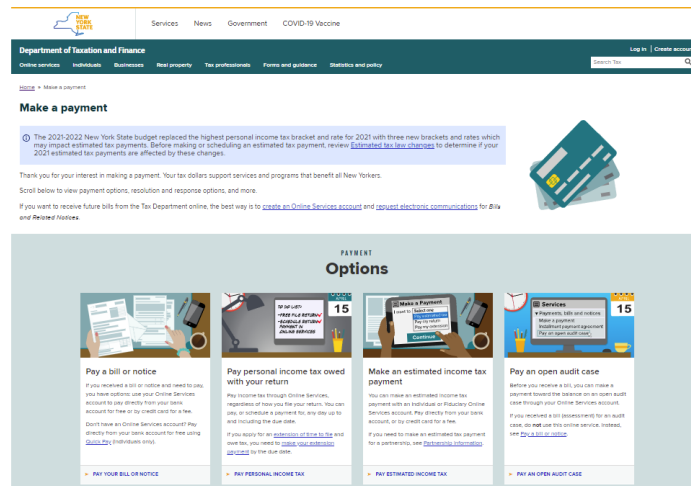
Cancel Previous Submit

NEW YORK

1. Navigate to the [Department of Taxation and Finance \(ny.gov\)](https://www.tax.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.

The screenshot shows the New York State Department of Taxation and Finance website. The header includes the state logo and navigation links for Services, News, Government, and COVID-19 Vaccine. A dark teal navigation bar contains links for Online services, Individuals, Businesses, Real property, Tax professionals, Forms and guidance, and Statistics and policy. A search bar is on the right. The main content area is titled 'Make a personal income tax return payment online' and includes instructions on how to pay electronically, by bank account, or by credit card. It also features a 'Ready?' section with 'LOG IN' and 'CREATE AN ACCOUNT' buttons.

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.

The screenshot shows the 'Individual account verification' page on the New York State Department of Taxation and Finance website. It includes a 'CREATE INDIVIDUAL ACCOUNT' button and a list of verification steps: 1. Information reported on your New York State income tax return (Form IT-203 or IT-203-RED) for one of the past five years. 2. Note if you requested your New York State overpayment to be carried forward and did not request a refund on your personal income tax return, enter a single '0' in the Amount you owed field. 3. The ten-digit assessment ID number from your New York State tax bill (paper or digital). 4. The five-digit PIN from a letter you received from the Tax Department. 5. Confirmation that you have not filed a New York State income tax return for one of the past five years. The page also includes instructions for married filing joint taxpayers and a section for adding an individual Online Services account to an existing NY.gov account.

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

The screenshot shows the 'Security Check' page on the New York State Department of Taxation and Finance website. It includes a 'Security Check' section with instructions to enter the security code displayed below and then select 'Continue'. A security code '211796' is displayed in a yellow box. Below the code is a text input field for the security code and a 'Continue' button.



Services News Government COVID-19 Vaccine

Department of Taxation and Finance [Support](#) [Contact us](#)

Home [Help](#)

Individual Account Creation

Verification Type
Complete the following information and then select **Continue**.

* Required fields [Select to learn more about a particular field](#)

Taxpayer information

Social Security number (SSN): *


Have you received a five-digit PIN from the New York State Tax Department? * Yes ☐ No ☒

[Continue](#)

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.



Services News Government Local

Department of Taxation and Finance [Support](#) [Contact us](#)

Home [Help](#)

Individual Account Creation

Verification Type
Complete the following information and then select **Continue**.


* Required fields [Select to learn more about a particular field](#)

Taxpayer information

Taxpayer ID number: *

Have you received a five-digit PIN from the New York State Tax Department? * Yes ☐ No ☒

[Continue](#)



Services News Government Local

Department of Taxation and Finance [Support](#) [Contact us](#)

Home [Help](#)

Individual Account Creation

Individual Verification
Complete the following information and then select **Continue**.

* Required fields [Select to learn more about a particular field](#)

Taxpayer information

Taxpayer ID number: XXX-XX-0356

Taxpayer first name: *

Taxpayer middle initial: *

Taxpayer last name: *

Suffix: [Select suffix](#)

File Edit View Favorites Tools Help [What's New](#) [Sign In](#)

Taxpayer ID number: XXX-XX-0356

Taxpayer first name: Jane

Taxpayer middle initial:

Taxpayer last name: Taxpayer

Suffix: [Select suffix](#)

Filer information

Please choose **one** of the options below and fill in corresponding information *

☐ I have filed a New York State income tax return (Form IT-201 or IT-203) for at least one of the past five years

☐ I have a bill (assessment)

☐ None of the above [Select](#)

[Back](#) [Continue](#)

- 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.

This screenshot shows a web application window titled "New York State". It contains a form for selecting a tax return. The "Taxpayer ID number" is "XXX-XX-0356". The "Taxpayer first name" is "Jane", "middle initial" is empty, "last name" is "Taxpayer", and "suffix" is "Select suffix". The "Filer information" section asks the user to choose one of two options: "I have filed a New York State income tax return (Form IT-201 or IT-203) for at least one of the past five years" (selected) or "I have a bill (assessment)". The "Tax year you filed a return" dropdown is open, showing years from 2011 to 2015. The "Taxable income reported on your return (\$)" is "2011" and "Did you request a refund on your return?" is "No". The "Back" and "Continue" buttons are at the bottom.

- If successfully verified, you will then create your user and log in information.

The first screenshot shows the "NY.gov ID Account Creation for Tax and Finance" page. It has a "Login Information" section with a "My Information" form. The "My Information" form has fields for "First name" (JANE), "Last name" (TAXPAYER), "E-mail address" (empty), "Confirm e-mail address" (empty), and "Phone number" (empty). The second screenshot shows the same form with the "E-mail address" field filled with "user@domain.com", "Confirm e-mail address" filled with "user@domain.com", and "Phone number" filled with "5185551234". Below the "My Information" form is a "Login Information" section with fields for "Username" (empty), "Password" (empty), and "Confirm password" (empty). The "Cancel" and "Submit" buttons are at the bottom.

NEW JERSEY

- To make an online payment to New Jersey, go to the Division of Taxation website. [NJ Division of Taxation - Make an Online Payment \(state.nj.us\)](https://www.state.nj.us/treasury/taxation/). Select Make an Online Payment...Individual Tax Payment

This screenshot shows the "NJ Division of Taxation" website. The header includes the "NJ Treasury" logo and the "Division of Taxation" logo. The navigation bar includes links for "Taxation", "EFile", "Pay Tax", "Forms", "Individuals", "Property Tax Relief", "Businesses", "Tax Professionals", "Resources", and "Contact Us". A yellow banner at the top of the main content area reads "COVID-19 Related Tax Information" and "COVID-19 Teleworking Guidance Updated 08/03/2021". Below the banner is a "Home / Make an Online Payment" breadcrumb. The "Make an Online Payment" section has a list of links: "Individual Tax Payment" and "Business Tax Payment".

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

State of New Jersey
DEPARTMENT OF THE TREASURY

Governor Phil Murphy • Lt. Governor Richard Codey
NJ Home • Elections & Voting • Departments/Divisions • E-File

Division of Taxation

Taxpayers • Taxpayers

Taxation Data Security

Individual Income Tax Payment and Filing

Electronic Services

This page is for **Income Tax** payments, filings, and inquiries - as well as for repayments of excess property tax relief benefits (Senior Freeze or Homestead Benefit). **It cannot be used to make Inheritance or Estate Tax payments.** Go back if you want to pay other taxes online. If this is your first time filing a tax return with New Jersey, you cannot use this portal to make a payment. First-time filers should visit our [filers-to-go](#) page for directions on submitting your payment by mail.

Using the prompt below, you can:

- File for an extension of a deadline for income tax filings.
- Pay income taxes **only** by credit or debit card (see applicable) or arrange for a payment to be deducted from your bank account (e-check).
- Schedule payment or modify an existing payment.
- Make Estimated Income Tax payments and track your account.
- Pay bills resulting from corrections in Senior Freeze (Property Tax Reimbursement) or Homestead Benefit payments.

[Go back](#) if you have income tax payments other than estimated tax that are more than 60 days past due and you want to check your unpaid balance before you pay.

To use the prompt, you must have your:

- Your **Social Security number** or **federal identification number** and your **date of birth**. If you are a married or civil union couple and filing a joint income tax return, enter the Social Security number listed first on your NJ-1040-ES payment voucher or on last year's income tax return.
- If you are the Taxpayer (Taxpayer, executor, or administrator) of an estate or trust, you will need the decedent's federal identification number as well as the date of the decedent's death or the date the trust was created. The death date or trust date can be found in lines one through four of Form NJ-1041. Enter this date into the **Date of Birth** prompt.

Individual taxpayers should enter the appropriate Social Security number and birthdate. Estate trustees, executors or administrators should enter the federal identification number as well as death date or the date a trust was created. For issues with logging in, please contact our Customer Service Center at 609-292-6400 during normal business hours.

Enter Social Security Number or federal identification number: (Without hyphens or dashes)

☐ View entered identification number

Date of Birth (Or, for estates, date of death or trust date.): Month Day Year

-
-
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

State of New Jersey
Department of the Treasury
Division of Taxation

Individual Taxpayer Account, Filing and Payment Services Account Center

Taxation home | Electronic services | Contact us

SSN:

Indicate the type of service requested by checking the appropriate button.

NJ Gross Income Tax

- ☐ File Extension - NJ Gross Income Tax NJ-630
- ☐ Electronic Check Payment - NJ Gross Income Tax Returns (1040/1040NR/1041)
- ☐ Credit Card Payment - NJ Gross Income Tax Returns (1040/1040NR/1041)
- ☐ Estimated Payments - Schedule/Submit NJ-1040-ES
- ☐ Estimated Payments - Statement of Account

Property Tax Programs

- ☐ Pay Homestead Benefit Bill
- ☐ Pay Senior Freeze (Property Tax Reimbursement) Bill
- ☐ Pay Tenant Rebate Bill

Other

- ☐ View/Modify/Cancel Payments for Year

State of New Jersey
Department of the Treasury
Division of Taxation

Individual Taxpayer Account, Filing and Payment Services Estimated Payments Processing Menu

Taxation home | Electronic services | Contact us

Return Year:

☐ Pay NJ-1040-ES Estimated Payment(s) - Schedule Multiple Payments by E-Check

☐ Pay NJ-1040-ES Estimated Payment - Single Payment by E-Check or Credit Card

Return Type:

Return Period:

Return Year: