

How to Set Up an Account with the IRS: (budget 5-10 minutes)

WHY?

Without an IRS Tax Account, you cannot easily gain access to the following tax information associated with your SSN:

- IRS tax return transcript (Ex: Form 1040)
- IRS Tax Forms (Ex: W2s and 1099s)
- IRS Tax Notices Ex: [IRS Notice 1444-C](#) for stimulus payment, and [IRS Letter 6419](#) on Advanced Child Tax Credit payments)
- Estimated Tax payment history and links to pay estimated tax online.

QUESTION: Should my spouse set up his or her own account with the IRS?

ANSWER: Yes. Because your spouse's account may have information linked to only his or her SSN yet contain necessary information for your JOINT tax return.

HOW TO:

(TIP: Believe it or not, these steps are MUCH easier to accomplish from your smart phone rather than desktop.)

1. Create an Account with the IRS: Start by [Clicking HERE](#)
2. Select: *Create a new account* via *ID.me*. Your smart phone makes identity verification process fairly quick and easy – about 5 minutes. The IRS has partnered with *ID.me* to verify your identity through a series of steps.
 - Upload pictures of the front and back of your driver's license or Passport
 - Video scan of your face
 - Email and text verification
 - SSN verification
 - Mailing address verification
 - Finally, you will "Allow" ID.me to share your verified identity with the IRS.

3. Lastly, [Bookmark the IRS Account Login](#) for future ease of access. Before you log out, go snoop around. Your IRS account has loads of helpful information (see screen shots below) 😊

IRS

Signed in as [redacted] | Profile | Logout

Welcome, [redacted]

Get Transcript

Select a reason you need a transcript: Federal Tax

Below are the transcripts and years available.

Return Transcript	Record of Account Transcript
2021 🌐	N/A
2020	2020
2019	2019
2018	2018

Account Transcript	Wage & Income Transcript
2021	2021
2020	2020
2019	2019
2018	2018

Show All 📄 Show All 📄

Glossary

Return Transcript
Tax Return Transcripts show most line items from your tax return (Form 1040, 1040A or 1040EZ) as it was originally filed, including any accompanying forms and schedules. This transcript does not reflect any changes you, your representative or the IRS made after you filed your return. In many cases, a Return Transcript will meet the requirements of lending institutions offering mortgages and student loans.

Record of Account Transcript
Record of Account Transcripts