

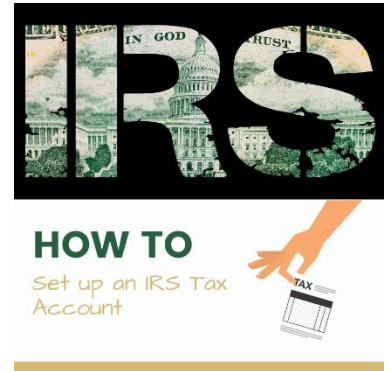
How To: Set Up IRS Individual Tax Account

(Estimated Time: 15-20 minutes)

WHY SET UP ACCOUNT?

With an IRS Individual Tax Account, you can easily gain access to the following tax information associated with *your* SSN:

- IRS tax return transcripts (Ex: Form 1040)
- Tax Forms (Ex: W2, K-1, 1099, 1098, 1099-Div, etc)
- IRS Tax Notices
- Estimated Tax payment history and links to pay estimated tax online.
- Thoughtfully monitor your installment agreement with IRS (if applicable)
- ❖ Each spouse should have his or her own account.



WHAT YOU WILL NEED

- Smartphone or computer with camera
- Driver's license or passport
- Social Security Number (SSN)
- Email (personal, never work email) and mobile phone
- Current mailing address

GET ONLINE SUPPORT

ID.me offers 24/7 multilingual support. Additional resources are available at help.id.me, including the option to submit a support request through [ID.me Help Center Portal](https://help.id.me/help-center).

[HOW TO – Set up IRS Individual Tax Account.](#) - 4 minute video tutorial

This video assumes an easy (no complications) set up process, which is unlikely. If you have any trouble, please see detailed Step-by-Step Guide below.

[HOW TO - Navigate IRS Individual Tax Account & Pay Tax Online.](#) – 1 minute video tutorial

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STEP 1 – Go to the IRS Website

1. Go to www.irs.gov
2. Click “Create Account” and then “Sign in or create account”
3. Click “Create an account”

The screenshot shows the IRS 'Your account' page. The top navigation bar includes links for File, Pay, Refunds, Credits & Deductions, Forms, and Report Fraud. The main heading is 'Your account'. Below this, there are language options: English, Español, 中文(简体), 中文(繁體), 한국어, Русский, Tiếng Việt, and Kreyòl ayisyen. The page is divided into two main sections: 'Interactive Tax Assistant' on the left and 'Create account or sign in' on the right. The 'Interactive Tax Assistant' section has a 'Tools' tab selected, showing options like Document Upload Tool, Report fraud, Tax scams, Identity theft, Notices and letters, Appeals, Frequently asked questions, and Accessibility. The 'Create account or sign in' section has three columns: Individual, Business, and Tax Pro. The 'Individual' column is highlighted with a yellow box and contains a list of services (Refunds, Tax records, Payments, Notifications) and a 'Sign in or create account' button, which is also highlighted with a yellow box. Below the button is a link to 'About Individual Account'. The 'Business' column has a list of services (Account balance, Payments, Tax records, Notices and letters) and a 'Sign in or create account' button, with a link to 'About Business Tax Account' below it. The 'Tax Pro' column has a list of services (Individual POA and TIA, Payments for taxpayers, POA and TIA withdrawal, Authorized users) and a 'Sign in or create account' button, with links to 'About Tax Pro Account' and 'Use e-Services' below it.

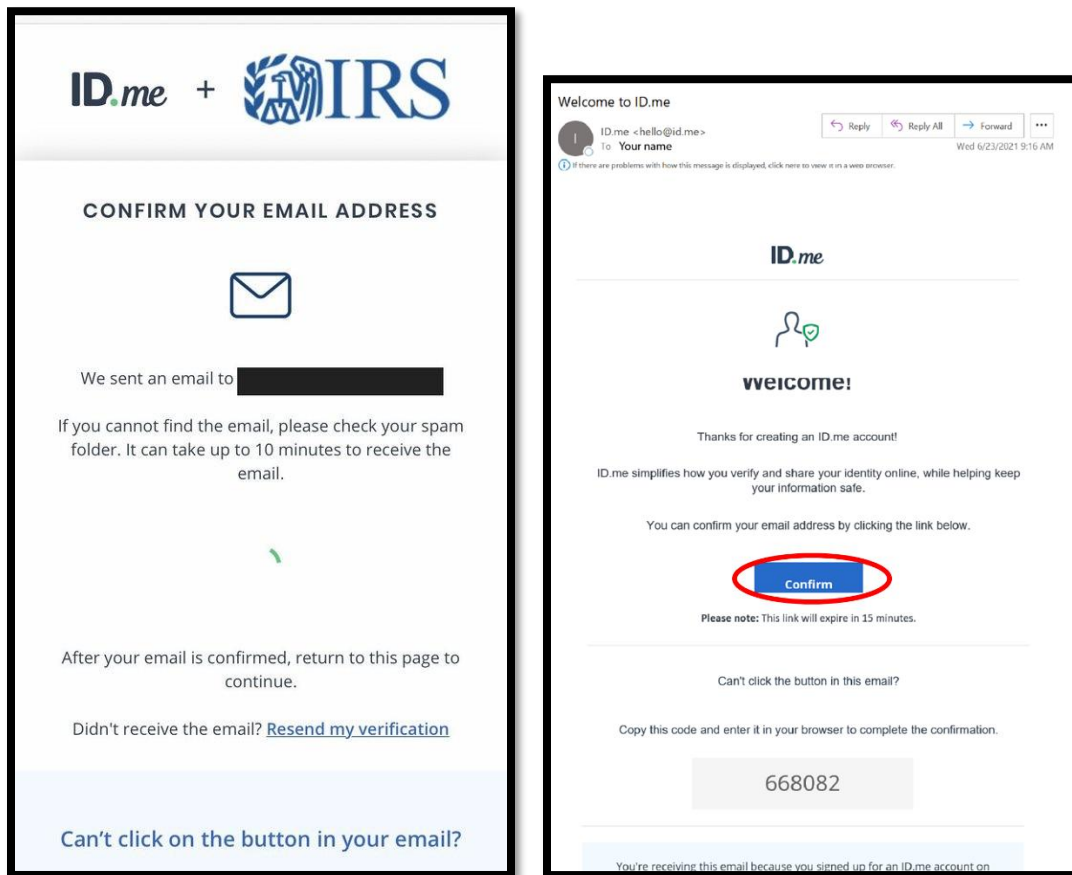
STEP 2 – Create Your ID.me Account

1. Enter your email
2. Create a password

The screenshot shows the ID.me + IRS 'Create an ID.me account' page. The top navigation bar includes the ID.me logo and the IRS logo. The main heading is 'Create an ID.me account', which is highlighted with a yellow box. Below this, there is a warning message: 'Multiple ID.me accounts are not allowed. If you have an ID.me account, use it to sign in.' and a link to 'Follow these steps.' for users who need to use ID.me for work. The form has three main sections: 'Email *', 'Password', and 'Confirm Password *'. Each section has a text input field with a placeholder and a small icon. Below the form, there are two checkboxes: 'Remember me' (For your security, select only on your devices.) and 'I accept the ID.me Terms of Service and Privacy Policy *'. At the bottom, there is a blue 'Create account' button, which is highlighted with a yellow box.

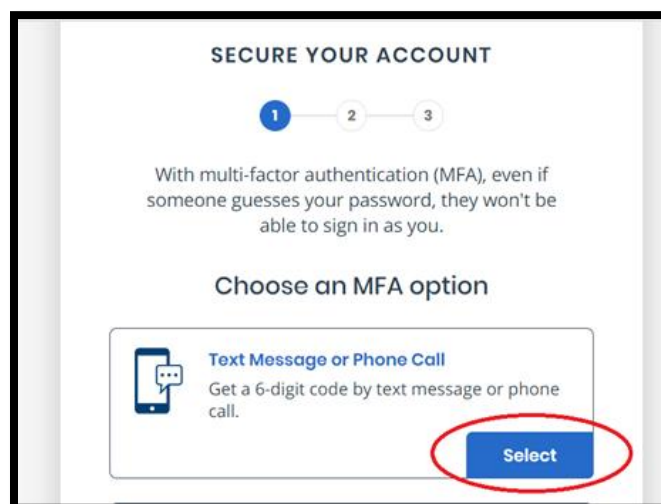
STEP 3 – Confirm Your Email Address

- You will be sent an email from the sender “ID.me” with the subject line “Welcome to ID.me.” Click the blue “Confirm” button to confirm your email address.

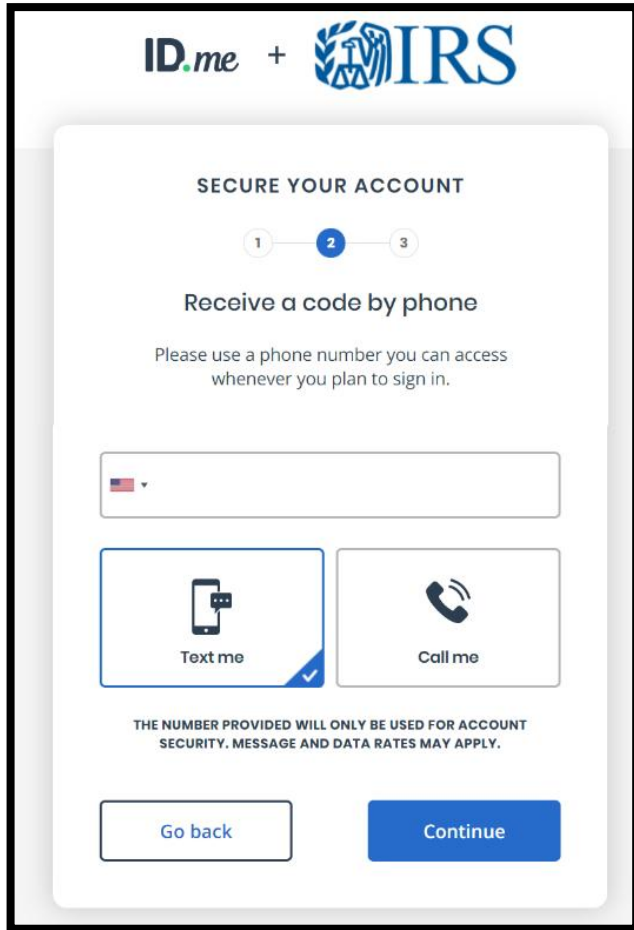


STEP 4 – Secure Your Account

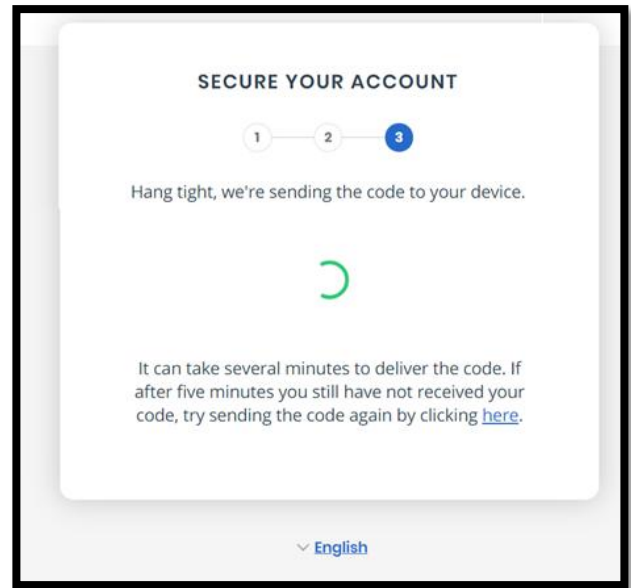
- After clicking the blue “Continue” button, you will be asked to secure your account. There are five options to secure your account. I recommend “Passkey”.
- We will use the text or phone call option for this guide.** Press the blue “Select” button for “Text Message or Phone Call.”



- Enter your phone number. You can choose whether to receive the security code by text message or phone call. (This guide uses the texting option)

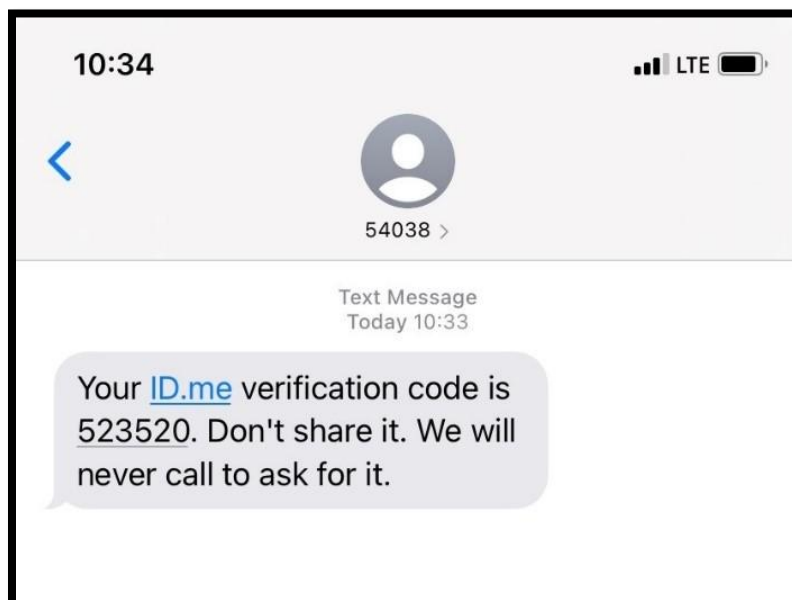


The screen displays the ID.me + IRS logo at the top. Below it, the heading "SECURE YOUR ACCOUNT" is followed by a progress indicator with three steps: 1, 2 (highlighted), and 3. The main heading is "Receive a code by phone". Below this, a note says "Please use a phone number you can access whenever you plan to sign in." There is a dropdown menu for country selection, currently showing the US flag. Below the dropdown are two buttons: "Text me" (with a checkmark icon) and "Call me" (with a phone icon). A disclaimer states: "THE NUMBER PROVIDED WILL ONLY BE USED FOR ACCOUNT SECURITY. MESSAGE AND DATA RATES MAY APPLY." At the bottom are "Go back" and "Continue" buttons.



The screen displays the heading "SECURE YOUR ACCOUNT" and a progress indicator with three steps: 1, 2, and 3 (highlighted). Below the progress indicator, it says "Hang tight, we're sending the code to your device." There is a large green circular loading spinner. Below the spinner, a note says: "It can take several minutes to deliver the code. If after five minutes you still have not received your code, try sending the code again by clicking [here](#)." At the bottom right, there is a link for "English".

- Use the security code sent to your phone to secure your account. You will receive a text message like this on your phone:



- Enter the code in your text message into the setup screen. Then press the blue “Continue” button.
- You will be sent an email from the sender “ID.me” with the subject line “You have enabled multi-factor authentication.”

Your account is now secure! 😊

STEP 5 – Verify Your Identity (*Self-service vs. Video Chat Agent*)

There are two options to verify your identity: self-service or through a video chat agent.

Option 1 - Choose *Self-Service* (my recommendation)

- Takes 5-10 minutes
- Requires SSN and video selfie
 - Requires one of the following government-issued photo IDs: Driver's license, State ID, or passport
- If you don't have these documents available or if this option proves unsuccessful, return to this menu and select the *video chat agent* option.

Option 2 – Choose *Video Chat Agent* (if selected, see *Appendix* for instructions)

- Takes 30-90+ minutes
- Required IF you've experienced the following:
 - ITIN holders (you don't have a SSN)
 - Recent name or address change
- Accepts a broader list of identity documents.
- Allows you to speak directly to an ID.me video agent.
- Does not collect a selfie or biometric data.

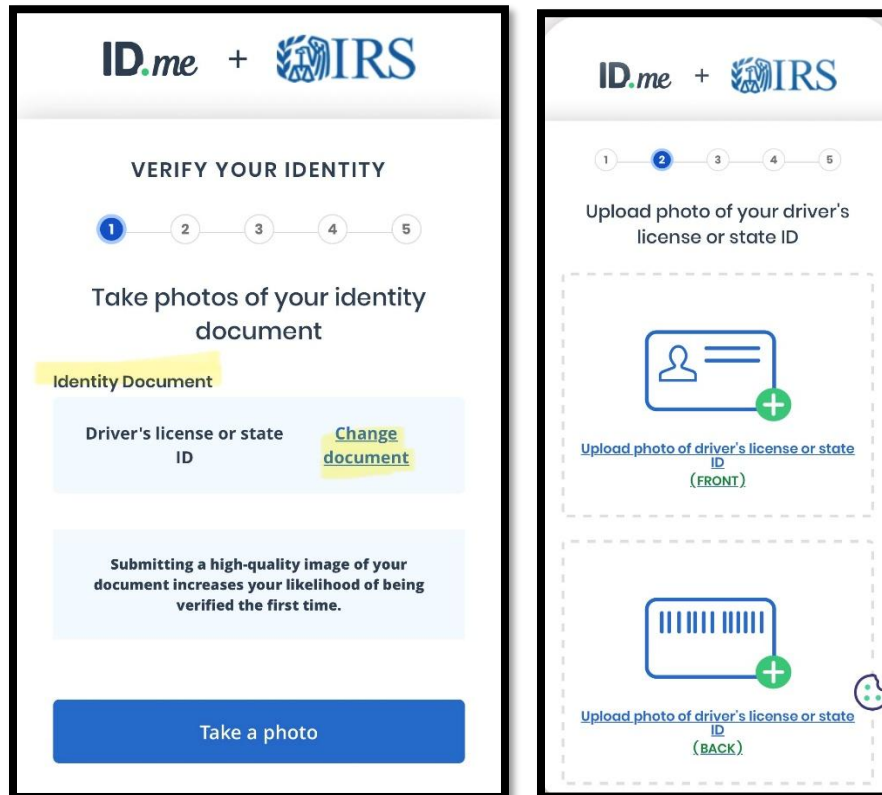
Self Service:

1. Select *Self-Service*, then click blue “Continue” button.
2. You'll be directed to a privacy policy. Check the box “I acknowledge...” Then click the blue “Continue” button.

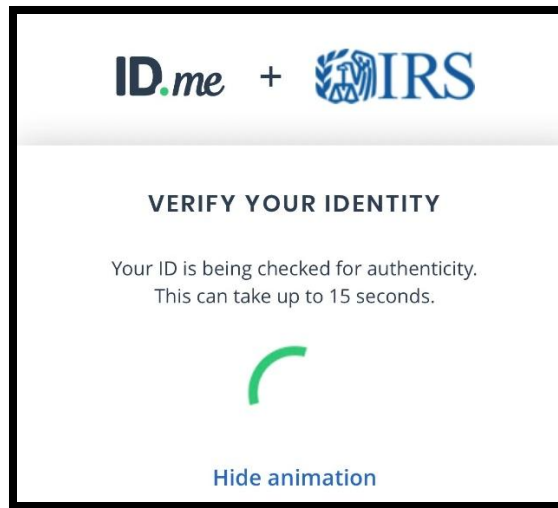
The image displays two screenshots of the ID.me verification interface. The left screenshot, titled "VERIFYING IS FAST AND EASY", presents two verification methods: "Self-Service (Faster Option)" and "Video Chat Agent". The "Self-Service" option is selected, indicated by a green circle. Below it, bullet points specify requirements: a Driver's License / State ID, Passport, or Passport Card and a selfie; deletion of selfie and biometric data; and a 5-10 minute duration. The "Video Chat Agent" option is unselected, with bullet points noting the need for at least two identity documents, a 5-10 minute video chat, no selfie or biometric data collection, video deletion, and a 17-minute wait time. A red circle highlights the blue "Continue" button at the bottom. The right screenshot shows the "CONSENT FOR ID.ME TO COLLECT BIOMETRIC DATA" screen. It contains a disclaimer about the Terms of Service, a "BIOMETRIC DATA CONSENT AND POLICY" section detailing data collection and use, and a checkbox for "I acknowledge that I have received, read, and agree to the terms of the ID.me Biometric Information Privacy Policy". The blue "Continue" button is highlighted.

STEP 6 – Verify your identity via document upload

1. You have the option to upload your driver's license, passport, or passport card or upload a photo from your camera roll.
2. The default document to upload is a driver's license. If you want to upload photos of your Passport or Passport Card instead, click the text that says, "[Change document.](#)"
3. Follow upload instructions. You may be asked to give *ID.me* access to your camera or camera roll. Both boxes (*front* and *back*) should show photos of your driver's license or state ID.
4. Press the blue "[Continue](#)" button.



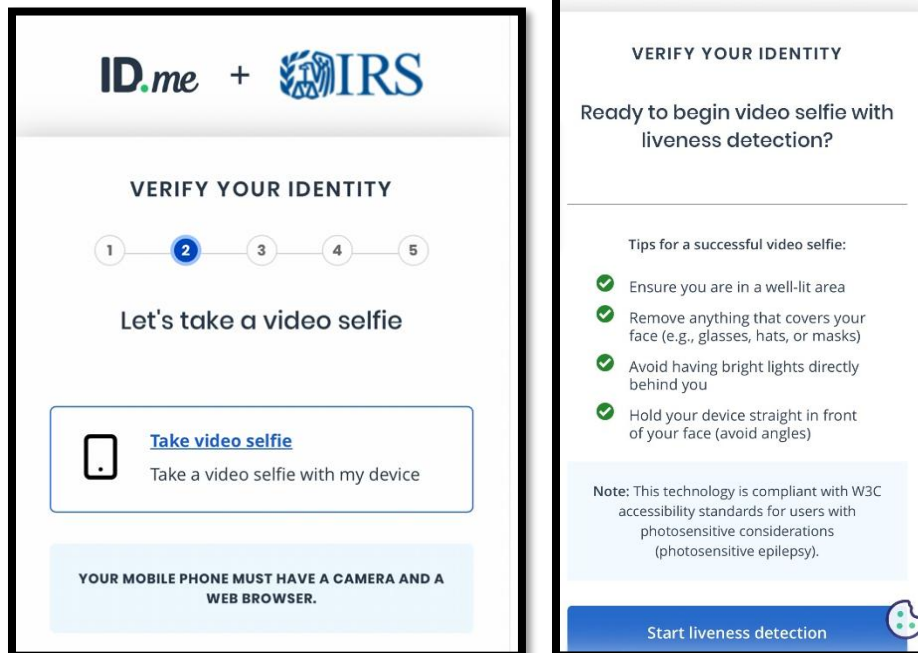
You will be taken to this page on your phone:



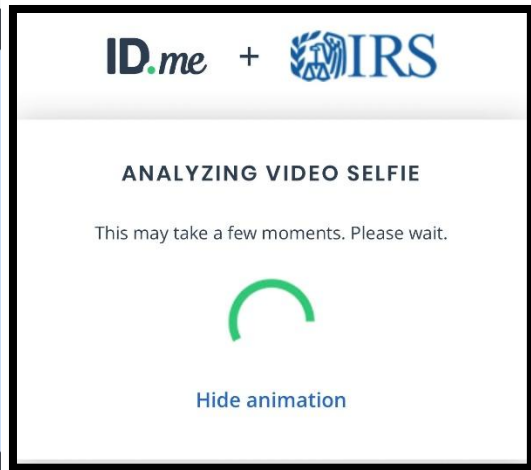
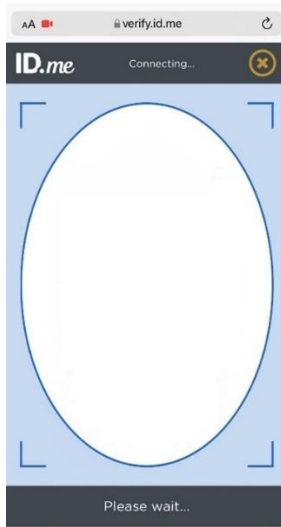
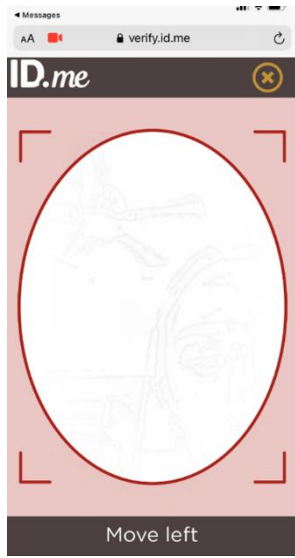
STEP 7 – Use your phone camera to take a video selfie

The purpose of this step is compare your “selfie” video to the uploaded documents (i.e. driver’s license) and ensure that the two correspond with one another.

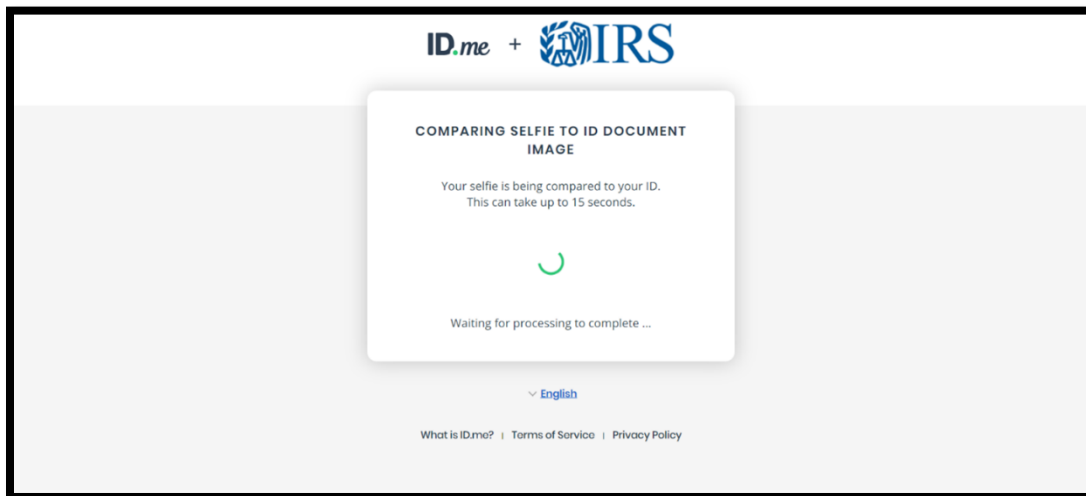
1. You will need to verify your identity by using your phone camera to scan your face during a short video. Click the [“Take video selfie”](#) button to get started.
2. Follow the steps carefully.



On your phone, you will be taken to this page where the scan will take place. The scan will be a short video with several colorful flashing lights. Make sure there is good lighting and your face and head are uncovered to match how you appear on your ID. Stay still and wait for the video to complete. ID.me will then process your selfie.

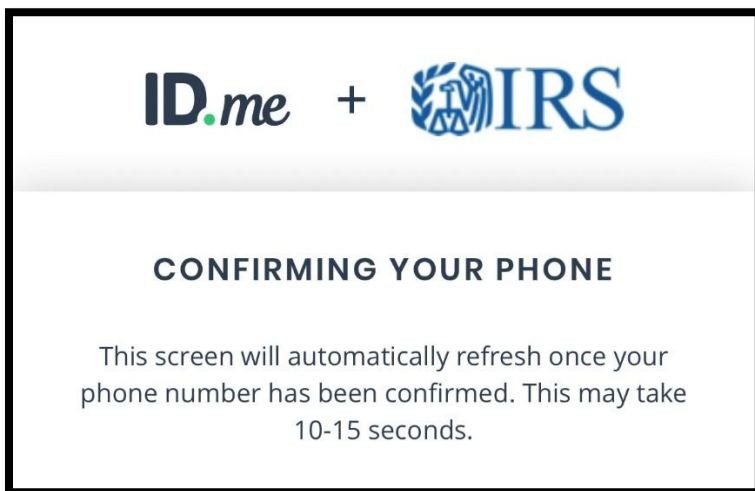


Once you have successfully completed the video selfie, you will be taken to this page:




STEP 9 – Verify your phone number

Enter your phone number. *ID.me* will confirm your phone number. Takes 10-15 seconds



STEP 10 – Verify your SSN:

Enter your SSN and click blue “Continue” button. This is safe to do and is needed to verify your identity. ID.me uses encryption to protect your information.



VERIFY YOUR IDENTITY

1 2 3 4 5

Enter your Social Security number

Social Security Number (#####) *

#####

The Social Security number is used as a unique identifier to confirm identity. This will not affect your credit score.

Continue

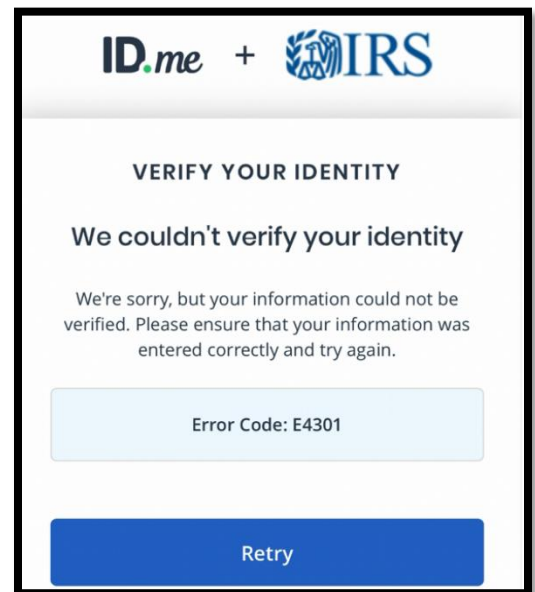
STEP 11a – Review and Confirm your information

- Next, you will be taken to a confirmation page. Check that your information on the screen matches what is printed on the identification you uploaded.
- Once you have reviewed your information and made any necessary changes, check the box “The information I’ve provide is correct...” Then click the blue “Yes” button.

STEP 11b – Troubleshoot Identity Verification Failure

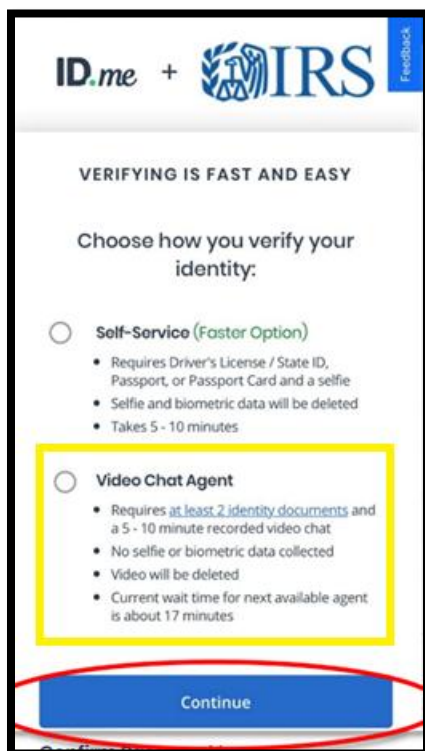
If you see the message below that says, *“We couldn’t verify your identity”*, that’s okay. This is **extremely common** for:

- name changes (marriage/divorce)
- address mismatches or recent address change
- thin or frozen credit files
- older clients
- ITIN holders or dual citizens



👉 What to do:

- Click **“Retry”** one time
 - ✓ Carefully re-enter information
 - ✓ Make sure: Name matches SSA record exactly, Address matches most recent tax return, No abbreviations, typos, or nicknames
- If *Retry* Fails Again → You must exit the *Self-Service* option and navigate to the **Video Agent Chat** option (from *Step 5, option 2* described earlier)
 1. Click your browser’s **Back** button until you are offered the verification choice screen; or
 2. Close your browser and return to the IRS ID.me log in Page:
<https://api.id.me/en/session/new>



Video Chat Agent: Skip to Appendix A

You will be asked to:

- Upload **at least 2 identity documents**
- Join a **recorded video call** with an ID.me agent
- Verbally confirm your identity

You may see:

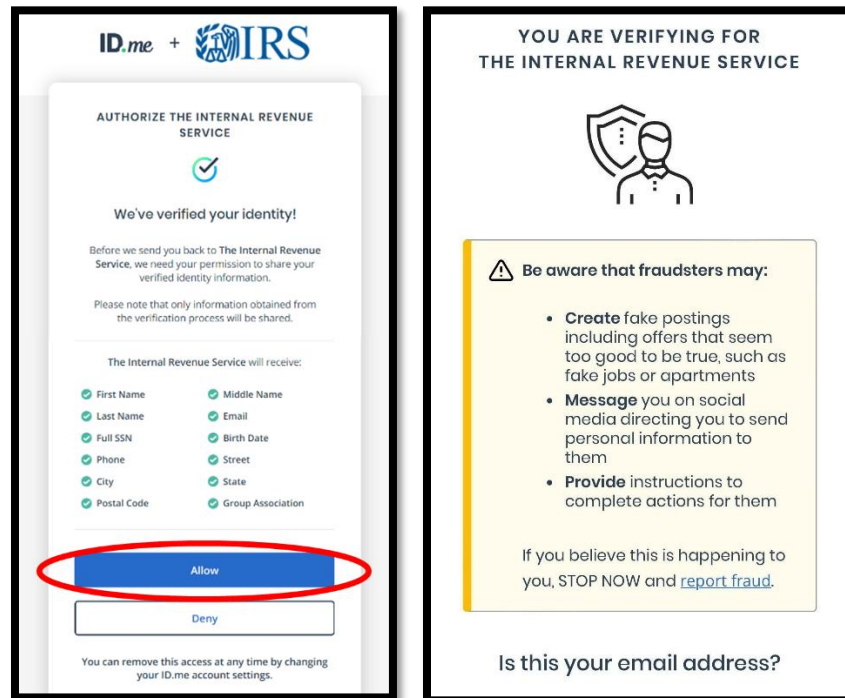
“Current wait time is approximately XX minutes”

This is normal.

👉 **Wait time is annoying, but this path almost always succeeds.**

STEP 12 – Allow ID.me to share your verified identity information with the IRS

When your identity is successfully verified, you will see this confirmation page. Click the blue “Allow” button to let ID.me to share your verified identity information with the IRS. You can withdraw consent of sharing your verified identity information by changing your ID.me account settings.

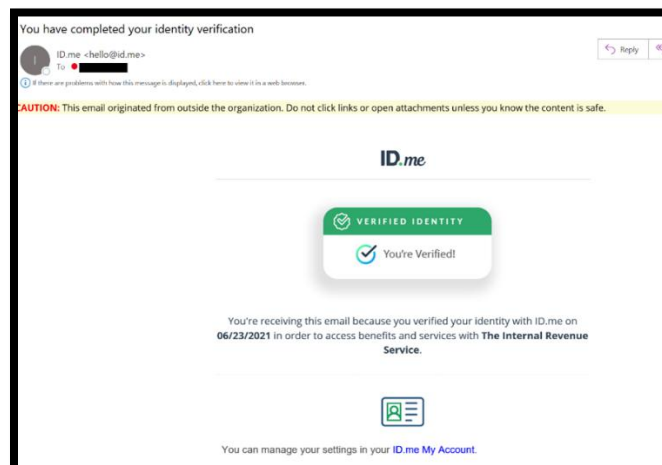


After hitting the “Allow” button, you will see a notice asking you to confirm that you want to continue. It provides a warning about some of the things people who pretend that they work with the IRS may do. After you’ve read the fraud awareness notice, enter your email address again to finish the verification process.

STEP 13: Receive confirmation of your completed identity verification process!

You will be sent an email from the sender “ID.me” with the subject line “You have completed your identity verification”.

1. Success! You are now ready to log in to your <https://www.irs.gov/>



APPENDIX – How to verify our identity via Video Agent Chat

ID.me + IRS

VERIFYING IS FAST AND EASY

Choose how you verify your identity:

☐ Self-Service (Faster Option)

- Requires Driver's License / State ID, Passport, or Passport Card and a selfie
- Selfie and biometric data will be deleted
- Takes 5 - 10 minutes

☐ Video Chat Agent

- Requires at least 2 identity documents and a 5 - 10 minute recorded video chat
- No selfie or biometric data collected
- Video will be deleted
- Current wait time for next available agent is about 17 minutes

Continue

ID.me + IRS

Verify identity on a video call

- 1 Confirm Details
Confirm your personal information
- 2 Send Documents
Select and send identity documents
- 3 Wait for Document Review
Wait in the virtual waiting room or come back once your documents are approved
- 4 Join Video Call
Meet a trained and certified ID.me Trusted Referee on a recorded video call

Get Started

English

What is ID.me? | Terms of Service | Privacy Policy

Appendix Step 1: Navigate to Video Agent Chat

1. Click “Get Started” and then Enter or review your personal information.
2. Enter your Social Security number (or ITIN). Your information will be reviewed, and you will be taken to the next page.

ID.me + IRS

Enter or review your information

Full Name

First Name *

Middle Name

Last Name *

Required field

Suffix

Date of Birth *

MM / DD / YYYY

Month is required.
Day is required.

Phone

ID.me + IRS

Confirm your Social Security number

Your Social Security number (SSN) helps us uniquely identify you. This will not affect your credit score.

Enter SSN *

Show SSN

Confirm SSN *

Show SSN

Don't have a Social Security number?

Continue by entering your Individual Taxpayer Identification Number (ITIN).

Continue

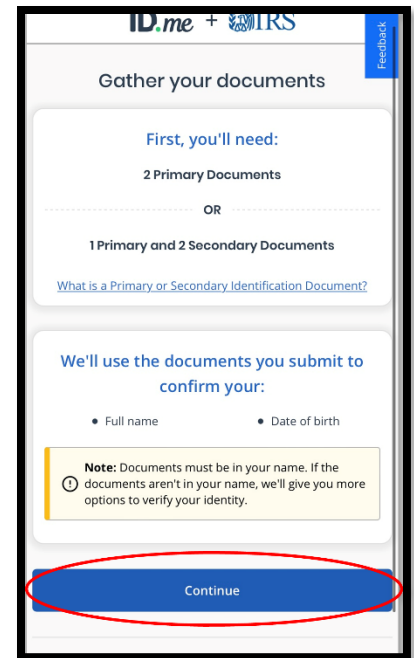
Appendix Step 2: Gather your identity documents

You can use either:

- 2 Primary Documents or
- 1 Primary Document AND 2 Secondary Documents
- The identity documents must be in your name and the **primary documents must be physically presented** on the call with the video chat agent.

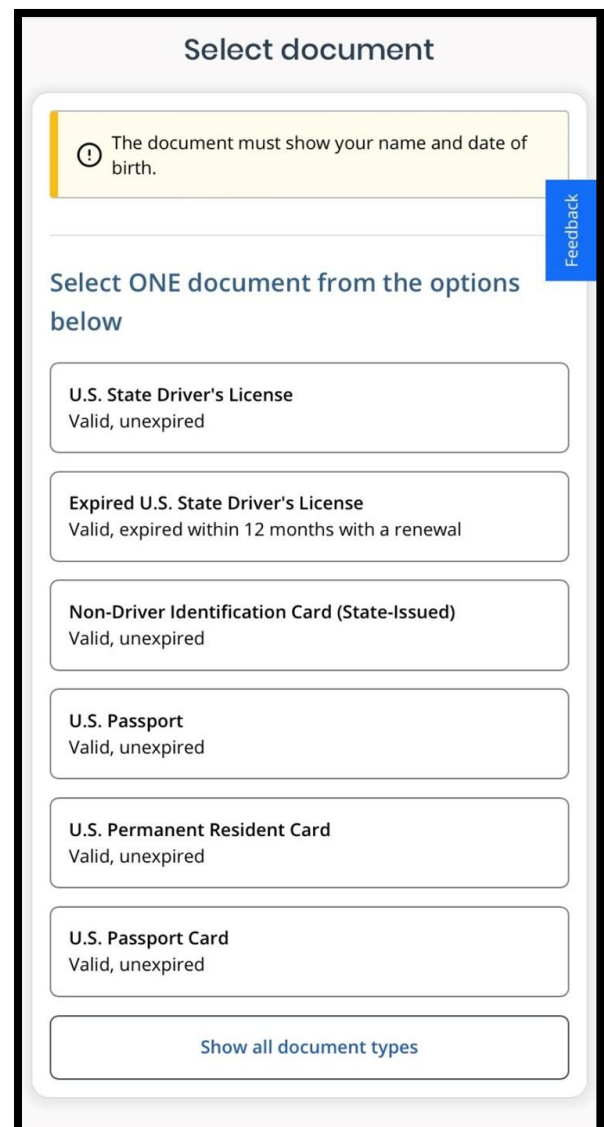
[Here is the list of acceptable primary and secondary documents that you can use.](#) If you use a secondary document, make sure that you have the document scanned in the correct color.

Click the blue “Continue” button when you are ready to upload your documents.



Appendix Step 3: Upload your documents for review

1. View the list of acceptable documents and click on the type of document you want to upload first.
2. If you do not already have photos of your documents saved on your device, we recommend you take pictures before completing the next steps. You will have to upload photos of your documents from your device's camera roll.
3. Once you upload the image, you will be asked to confirm that it is not blurry, shows your name and date of birth, and includes all four corners of the document in the photo. Click “Continue” when you are ready.
4. After you upload your first document (your primary document), you will be taken back to the previous page to select your second document (either a primary document or secondary document). Repeat the above steps until you have uploaded and submitted all your documents.



Appendix Step 4: Wait for your documents to be reviewed

- You will be taken to this page to wait for your identity documents to be reviewed. Wait times are displayed and continuously updated.
- While you are waiting, review your personal information and documentation to ensure they are accurate.
- If you do not have time to wait, you can click the white “Save & Exit” button at the bottom of the page to have instructions emailed about how to rejoin the virtual agent call waiting room.

The screenshot shows a web interface for waiting for document review. At the top, it says "Waiting for document review" with a green circular progress indicator and a timer showing "16 minutes" with the note "(Updates every 30 seconds)". A blue "Feedback" button is on the right. Below this is a light blue box with a numbered list: "1 ID.me is reviewing your documents" and "2 Waiting for next available video call". Underneath is a yellow box with a document icon and the text "Please have the following physical documents ready for presentation:", followed by a bulleted list: "• U.S. State Driver's License" and "• U.S. Passport". At the bottom is a white box titled "Don't have time to wait?" with instructions to save the application and leave the waiting room, noting that the user will lose their place in line but will receive an email to rejoin. A black input field labeled "Your Email" is present. A white "Save & Exit" button is highlighted with a red oval. At the very bottom, there is a language selector set to "English" and a footer with links for "What is ID.me?", "Terms of Service", and "Privacy Policy".

Waiting for document review

16 minutes
(Updates every 30 seconds)

Feedback

1 ID.me is reviewing your documents

2 Waiting for next available video call

Please have the following physical documents ready for presentation:

- U.S. State Driver's License
- U.S. Passport

Don't have time to wait?

Save your application and leave the waiting room.

You will lose your place in line, but we'll email instructions about how to rejoin to

Your Email

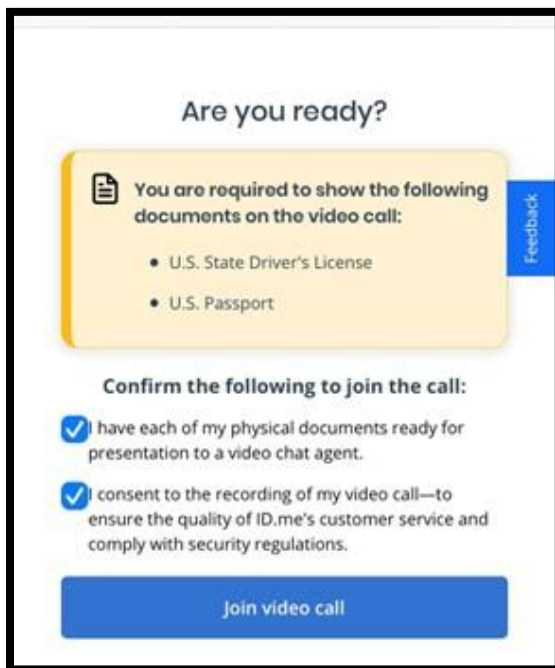
Save & Exit

English

What is ID.me? | Terms of Service | Privacy Policy

Appendix Step 5: Wait to join a call with a video chat agent

1. When your documents are successfully reviewed, you will see the page below. Click the blue “Join video call” button when you are ready.
2. You will be taken to another waiting room with an estimated wait time.



Are you ready?

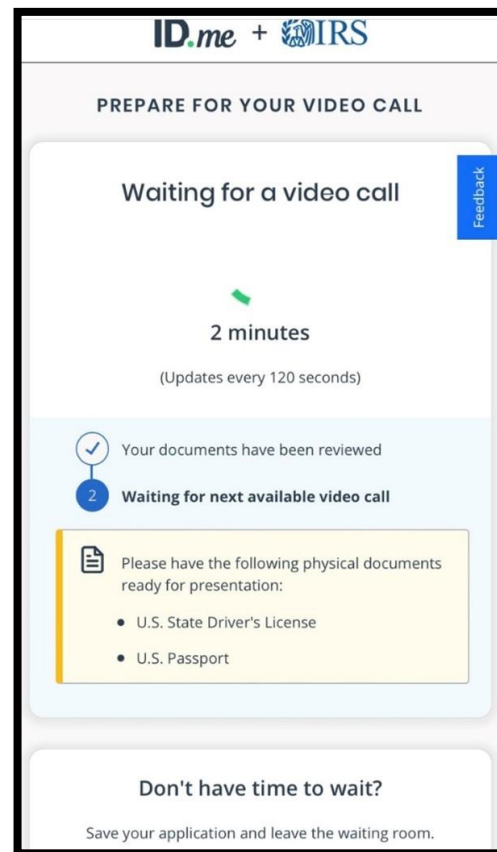
You are required to show the following documents on the video call:

- U.S. State Driver's License
- U.S. Passport

Confirm the following to join the call:

- ☒ I have each of my physical documents ready for presentation to a video chat agent.
- ☒ I consent to the recording of my video call—to ensure the quality of ID.me's customer service and comply with security regulations.

[Join video call](#)



ID.me + IRS

PREPARE FOR YOUR VIDEO CALL

Waiting for a video call

2 minutes
(Updates every 120 seconds)

☒ Your documents have been reviewed

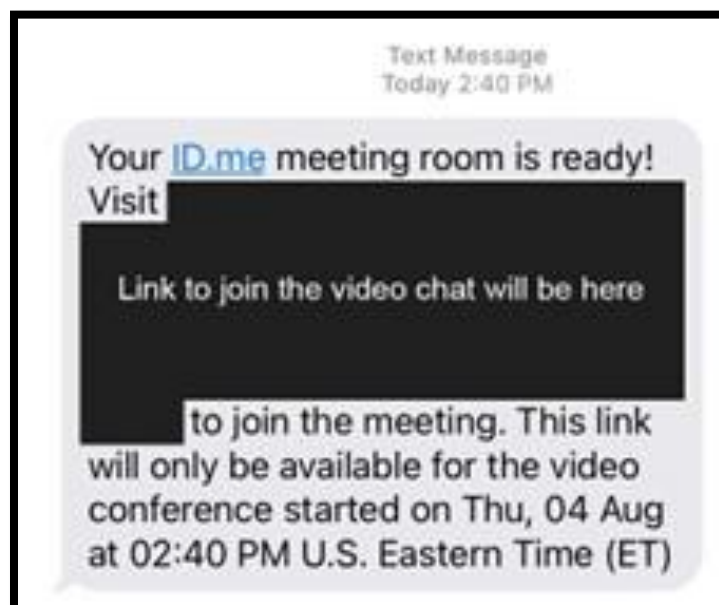
2 **Waiting for next available video call**

Please have the following physical documents ready for presentation:

- U.S. State Driver's License
- U.S. Passport

Don't have time to wait?
Save your application and leave the waiting room.

When it is your turn to join a call with a video chat agent, you will receive a text message to your cell phone number that looks like this:



Text Message
Today 2:40 PM

Your **ID.me** meeting room is ready!
Visit [redacted]
Link to join the video chat will be here [redacted]
to join the meeting. This link
will only be available for the video
conference started on Thu, 04 Aug
at 02:40 PM U.S. Eastern Time (ET)

Appendix Step 6: Join the meeting with the video chat agent

1. Click the link in the text message to join the video call with the chat agent.
2. You will be on camera with them, and they will give you instructions on what they need to see.
3. You will need to verbally confirm the personal information you submitted and show your primary documents on camera to verify your identity.

Appendix Step 7: Log into your ID.me account

1. Once your call with the video chat agent has completed, you will receive an **email** from the sender "ID.me" with the subject "Action required to complete verification." Read through the information and click the blue "[Continue](#)" button.
2. You will be taken to the [IRS Sign-In Webpage](#). Click the green "Sign in with ID.me" button and follow the instructions to sign into your account.
3. After you sign in, you will see a screen confirming that you have verified your identity.

