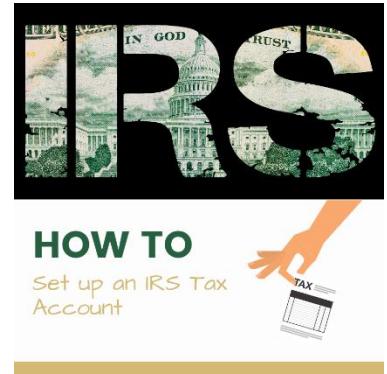


How To: Set Up IRS Individual Tax Account

(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.
- Thoroughly 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://id.me/help).

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

Step by Step Guide:

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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 website's 'Your account' page. At the top, there are navigation links for File, Pay, Refunds, Credits & Deductions, Forms, and Report Fraud, along with a search bar. Below the navigation, the page title 'Your account' is displayed. A sub-header 'Interactive Tax Assistant' is followed by a 'Tools' section containing links for Document Upload Tool, Report fraud, Tax scams, Identity theft, Notices and letters, Appeals, Frequently asked questions, and Accessibility. The main content area is titled 'Create account or sign in' and contains three sections: 'Individual' (highlighted with a yellow box), 'Business', and 'Tax Pro'. Each section has a 'Sign in or create account' button (also highlighted with a yellow box) and a link to 'About' that section. The 'Individual' section also includes a link to 'About Individual Account'.

STEP 2 – Create Your ID.me Account

1. Enter your email
2. Create a password

The screenshot shows the 'Create an ID.me account' form. At the top, the ID.me and IRS logos are displayed. The form includes a note that 'Multiple ID.me accounts are not allowed. If you have an ID.me account, use it to sign in.' Below this, there is a note for users who 'Need to use ID.me for work? Follow these steps.' A note indicates that an asterisk (*) indicates a required field. The form has three input fields: 'Email*' (with placeholder 'Enter your personal email address'), 'Password' (with placeholder 'Enter password'), and 'Confirm Password*' (with placeholder 'Reenter password'). Below the password fields are two optional checkboxes: 'Remember me' (with the note '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 large blue 'Create account' button (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.

CONFIRM YOUR EMAIL ADDRESS

We sent an email to [REDACTED]

If you cannot find the email, please check your spam folder. It can take up to 10 minutes to receive the email.

After your email is confirmed, return to this page to continue.

Didn't receive the email? [Resend my verification](#)

Can't click on the button in your email?

Welcome to ID.me

ID.me <hello@id.me> To Your name

Wed 6/23/2021 9:16 AM

ID.me

welcome!

Thanks for creating an ID.me account!

ID.me simplifies how you verify and share your identity online, while helping keep your information safe.

You can confirm your email address by clicking the link below.

Confirm (button circled in red)

Please note: This link will expire in 15 minutes.

Can't click the button in this email?

Copy this code and enter it in your browser to complete the confirmation.

668082

You're receiving this email because you signed up for an ID.me account on [REDACTED]

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.”

SECURE YOUR ACCOUNT

1 2 3

With multi-factor authentication (MFA), even if someone guesses your password, they won't be able to sign in as you.

Choose an MFA option

Text Message or Phone Call

Get a 6-digit code by text message or phone call.

Select (button circled in red)

- 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)

SECURE YOUR ACCOUNT

1 2 3

Receive a code by phone

Please use a phone number you can access whenever you plan to sign in.

Text me

Call me

THE NUMBER PROVIDED WILL ONLY BE USED FOR ACCOUNT SECURITY. MESSAGE AND DATA RATES MAY APPLY.

Go back

Continue

SECURE YOUR ACCOUNT

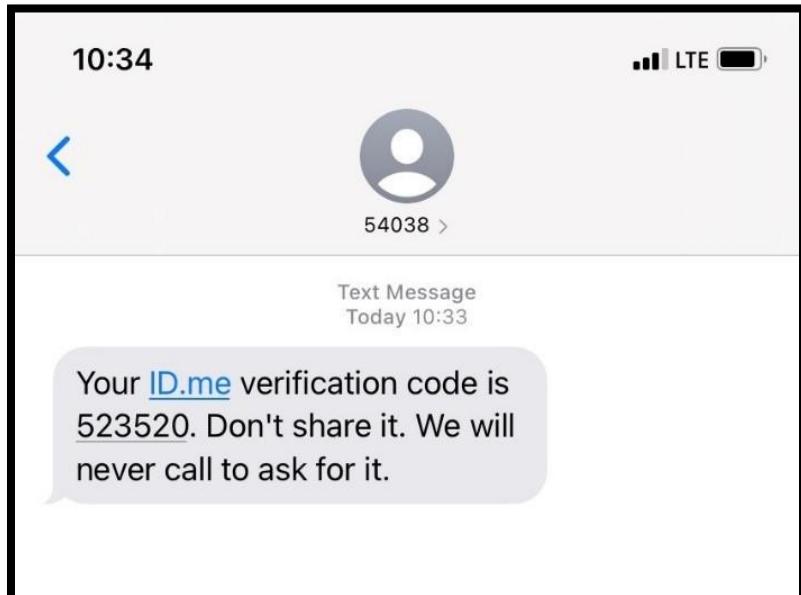
1 2 3

Hang tight, we're sending the code to your device.

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](#).

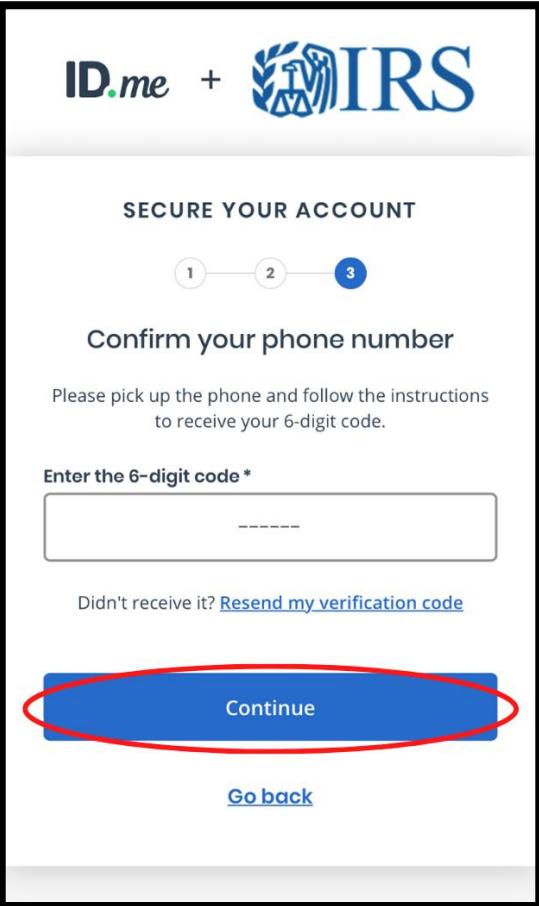
▼ English

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

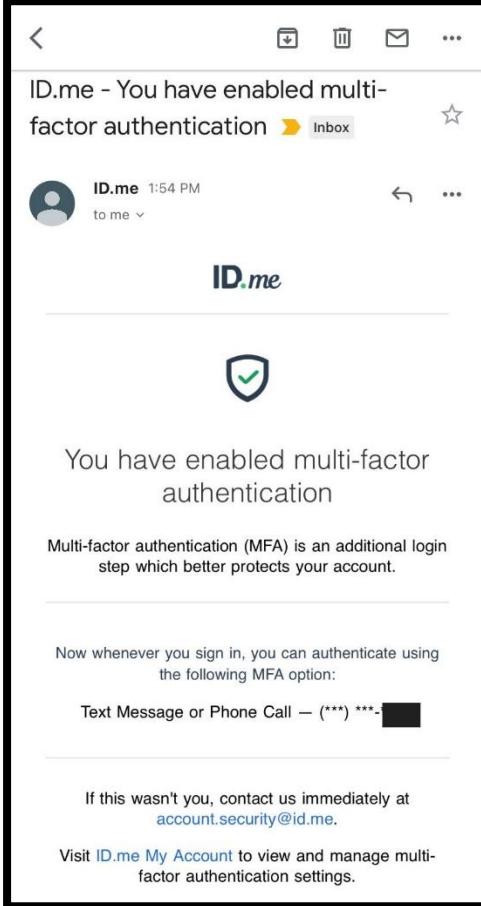


- Enter the code in your text message into the setup screen. Then press the blue “Continue” button.
- You will be sent an email from the sender “ID.me” with the subject line “You have enabled multi-factor authentication.”

Your account is now secure! 



The screenshot shows a mobile application interface for ID.me and IRS. At the top, the ID.me logo and IRS seal are displayed. Below this, the text "SECURE YOUR ACCOUNT" is centered. A progress bar with three steps (1, 2, 3) is shown, with step 3 being the current active step. The main section is titled "Confirm your phone number" and includes the instruction: "Please pick up the phone and follow the instructions to receive your 6-digit code." Below this is a text input field labeled "Enter the 6-digit code*" with a placeholder "-----". A link "Didn't receive it? [Resend my verification code](#)" is provided. At the bottom of the screen is a large blue "Continue" button, which is circled in red to indicate it should be pressed. Below the "Continue" button is a "Go back" link.



The screenshot shows an email inbox with a single message from "ID.me" with the subject "You have enabled multi-factor authentication". The message body contains the text "You have enabled multi-factor authentication" with a shield icon, a note about MFA being an additional login step for account protection, and instructions for using the MFA option (Text Message or Phone Call). It also includes a contact email "account.security@id.me" and a link to "ID.me My Account".

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)

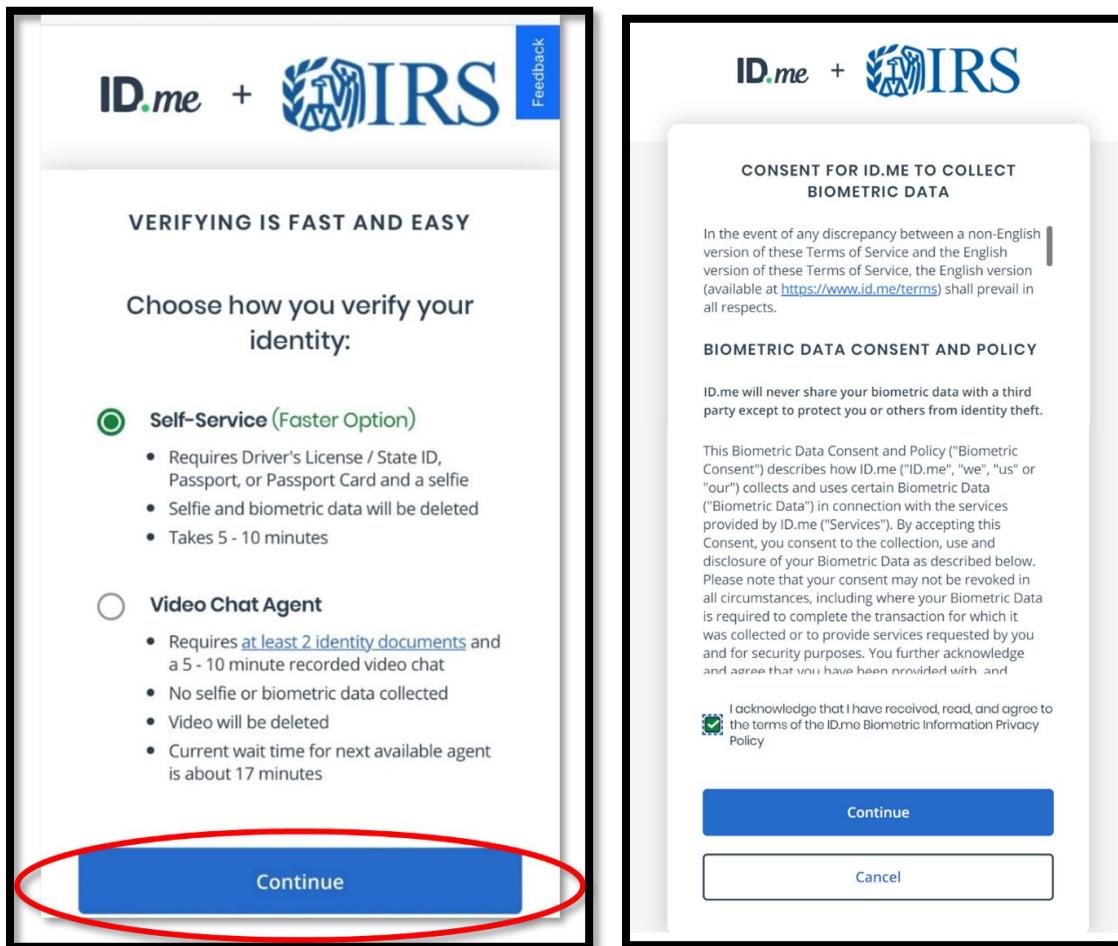
- Takes 5-10 minutes
- Requires SSN and video selfie
 - Requires one of the following government-issued photo IDs: Driver's license, State ID, or passport
- If you don't have these documents available or if this option proves unsuccessful, return to this menu and select the *video chat agent* option.

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.

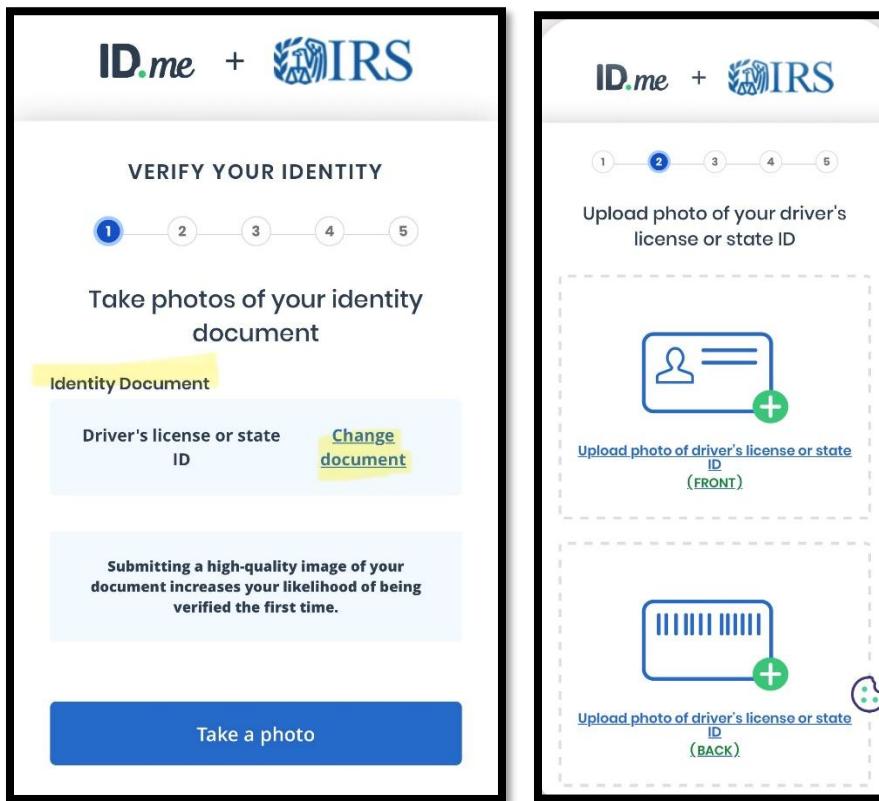
Self Service:

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.

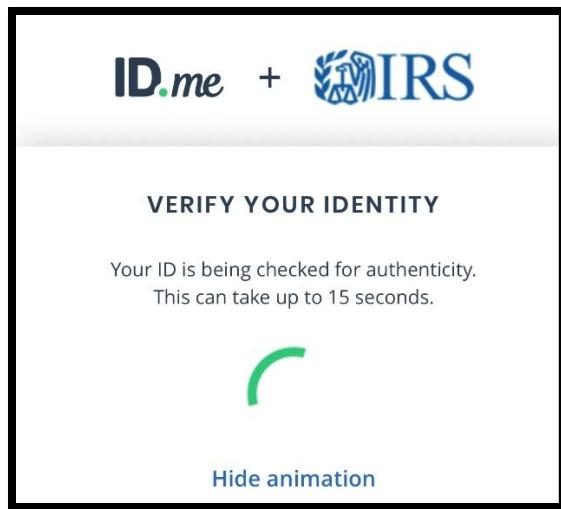


STEP 6 – Verify your identity via document upload

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.

VERIFY YOUR IDENTITY

Ready to begin video selfie with liveness detection?

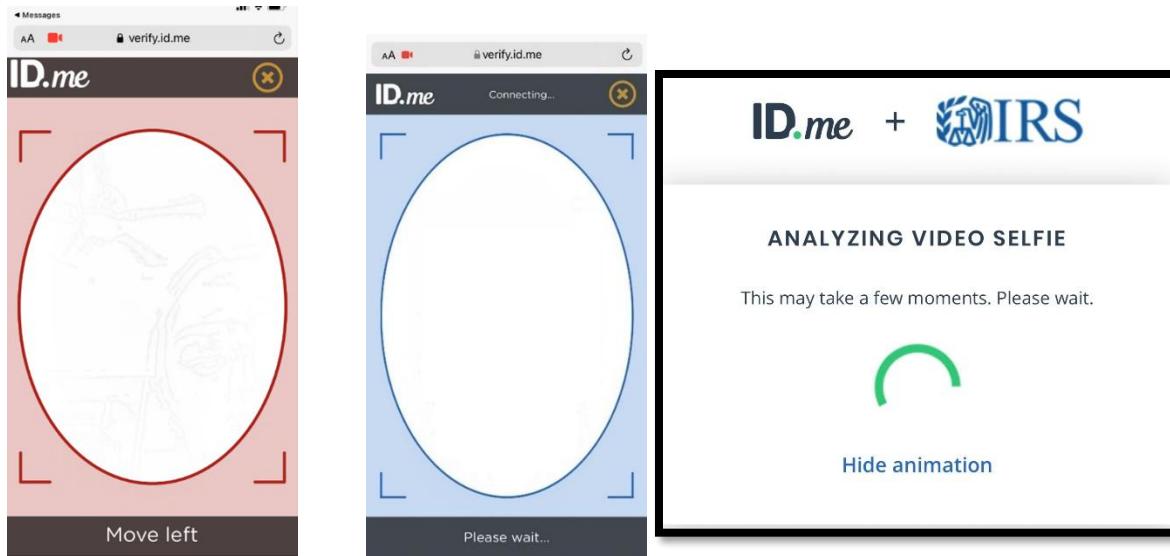
Tips for a successful video selfie:

- ✓ Ensure you are in a well-lit area
- ✓ Remove anything that covers your face (e.g., glasses, hats, or masks)
- ✓ Avoid having bright lights directly behind you
- ✓ Hold your device straight in front of your face (avoid angles)

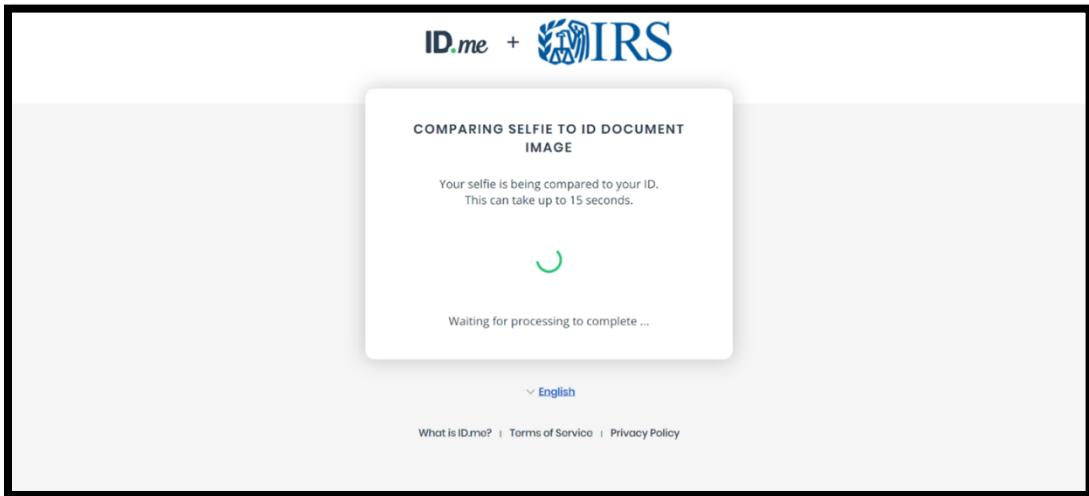
Note: This technology is compliant with W3C accessibility standards for users with photosensitive considerations (photosensitive epilepsy).

Start liveness detection

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.

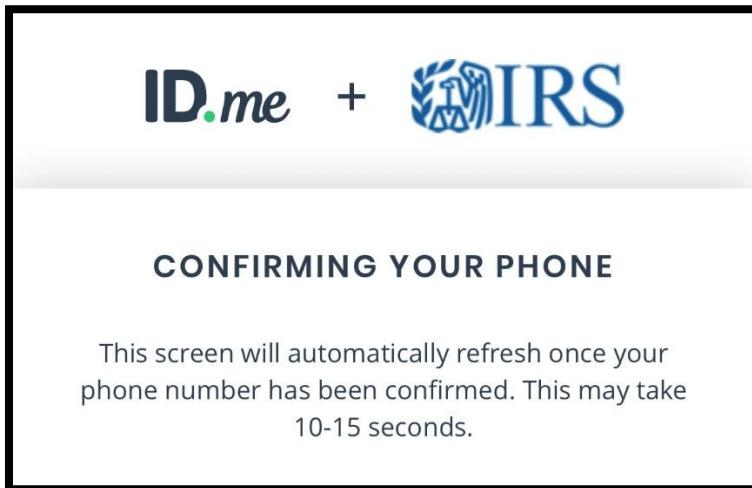


Once you have successfully completed the video selfie, you will be taken to this page:



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.

1 2 3 4 5

Confirm your information

We will securely use the following information to verify your identity against trusted sources.

What does this mean?

Personal information

First Name [REDACTED]
Middle Name
Last Name [REDACTED]
Gender female
Date of Birth [REDACTED]

Home address EDIT

Street [REDACTED]
City [REDACTED]
State [REDACTED]
Zip Code [REDACTED]

Phone number

Mobile Phone [REDACTED]

The information I've provided is correct, and I accept the use of Fair Credit Reporting Act data to verify my identity.

ID.me + IRS

VERIFY YOUR IDENTITY

Your information is being checked for authenticity.
This can take up to 10 seconds.

Waiting for processing to complete ...

▼ English

STEP 11b – Troubleshoot Identity Verification Failure

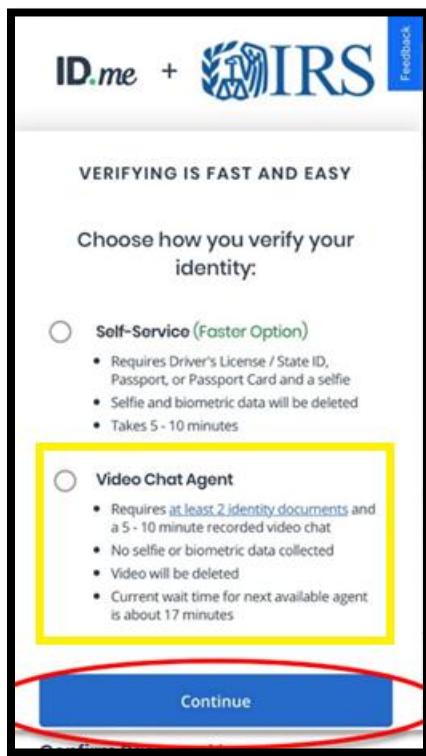
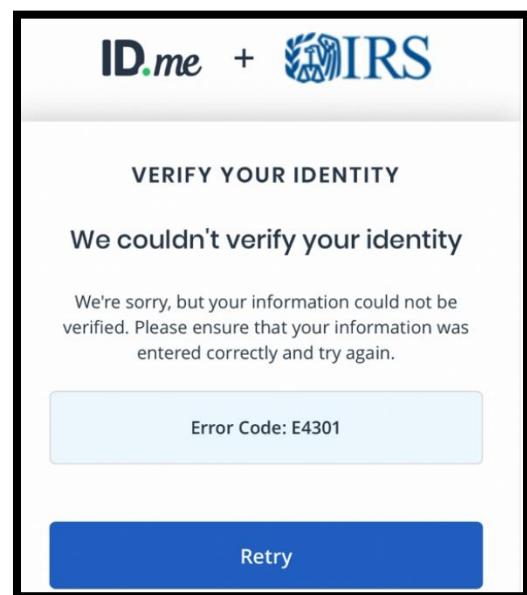
If you see the message below that says, “*We couldn’t verify your identity*”, that’s okay.

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

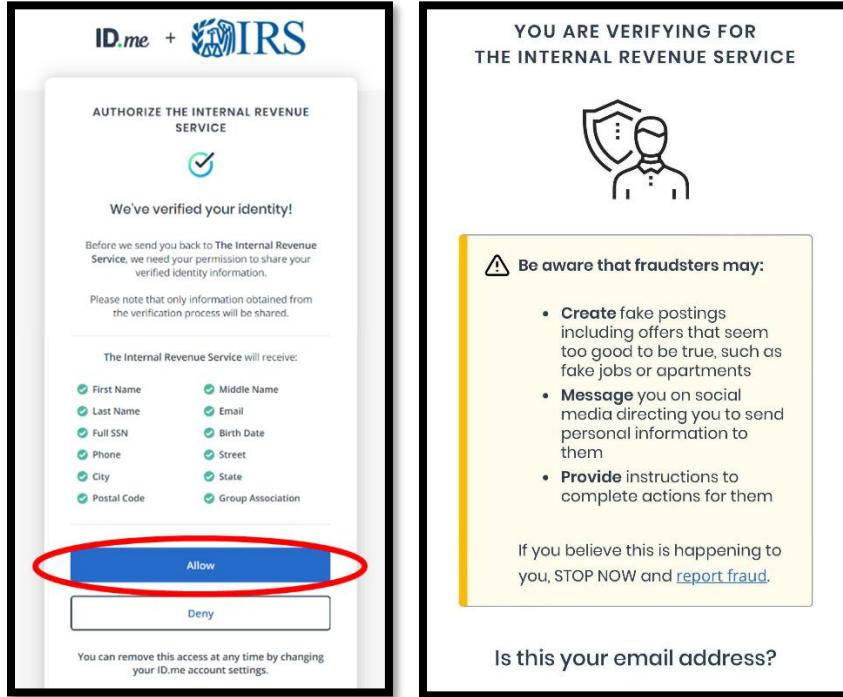
You may see:

“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.

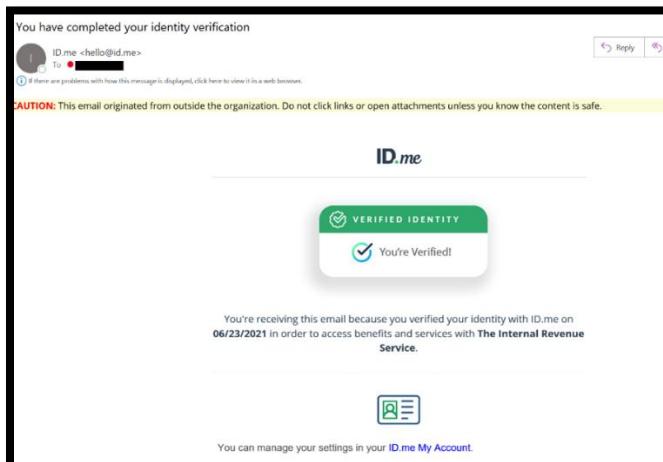


After hitting the “Allow” button, you will see a notice asking you to confirm that you want to continue. It provides a warning about some of the things people who pretend that they work with the IRS may do. After you’ve read the fraud awareness notice, enter your email address again to finish the verification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

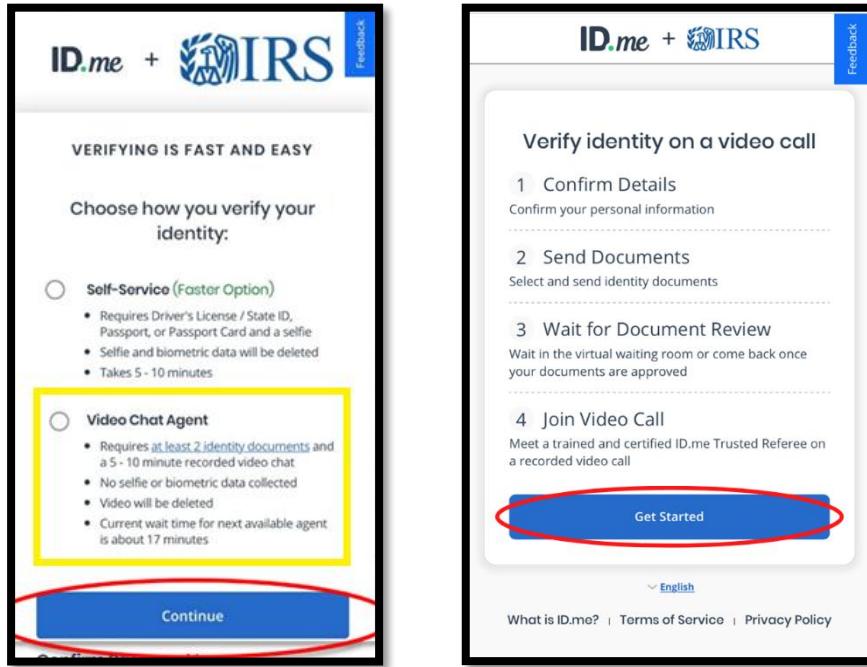
STEP 13: Receive confirmation of your completed identity verification process!

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/>

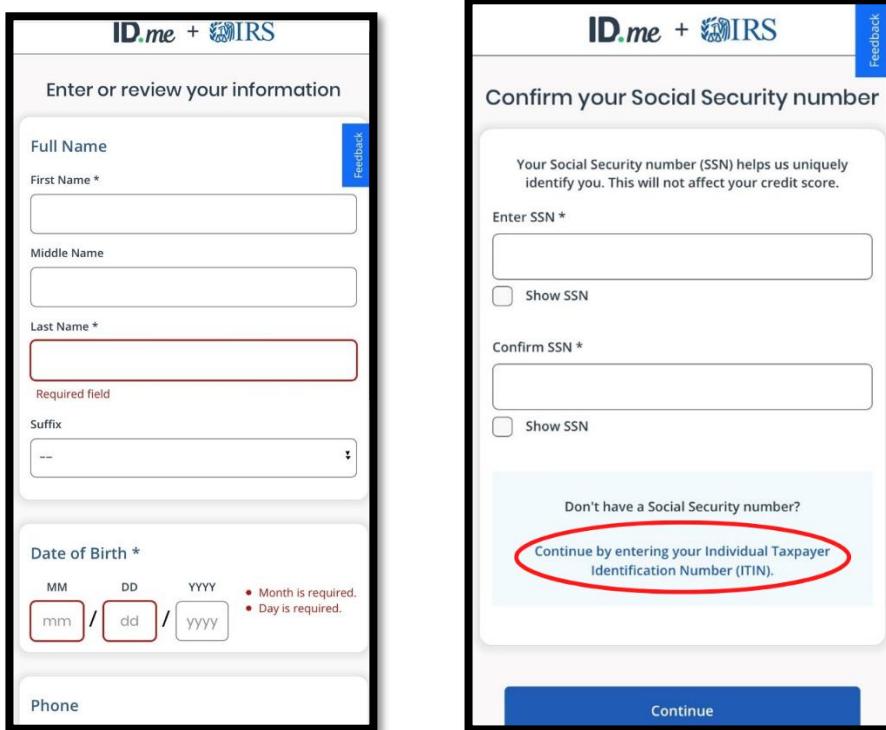


APPENDIX – How to verify our identity via Video Agent Chat



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.



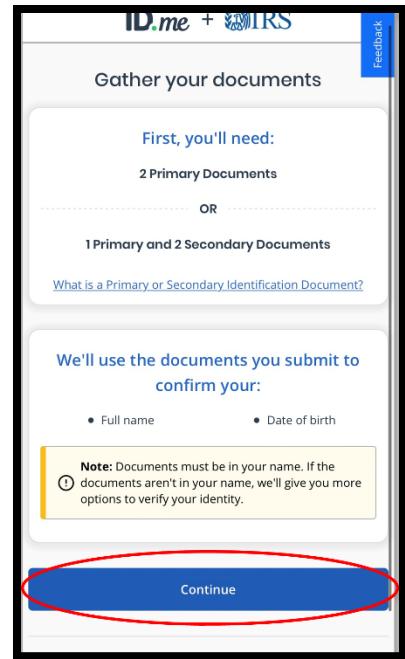
Appendix Step 2: Gather your identity documents

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.

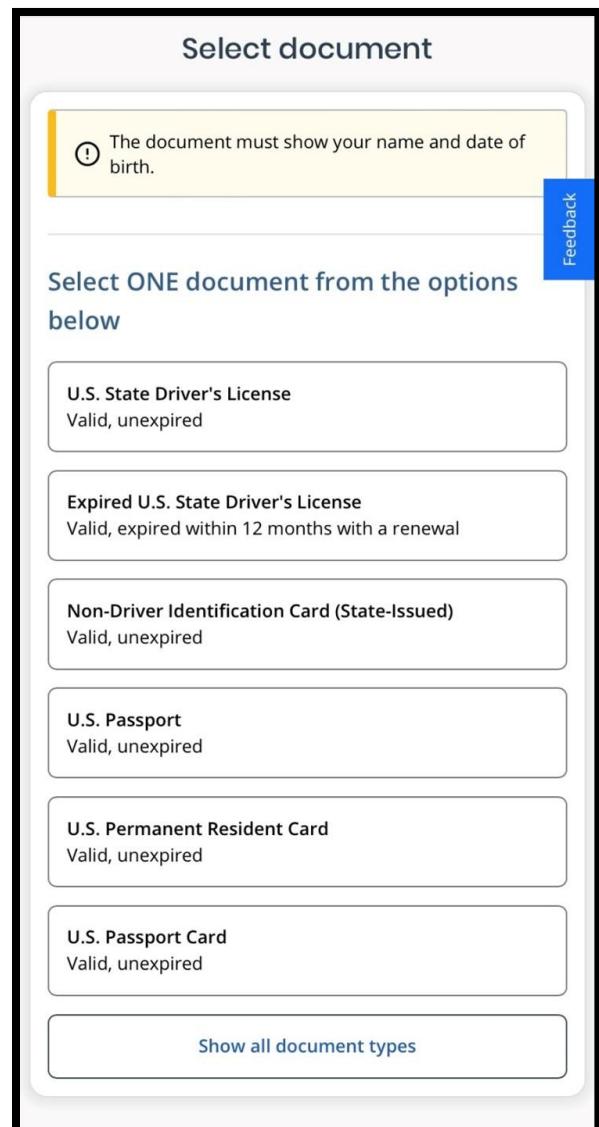
Here is the list of acceptable primary and secondary documents that you can use. If you use a secondary document, make sure that you have the document scanned in the correct color.

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



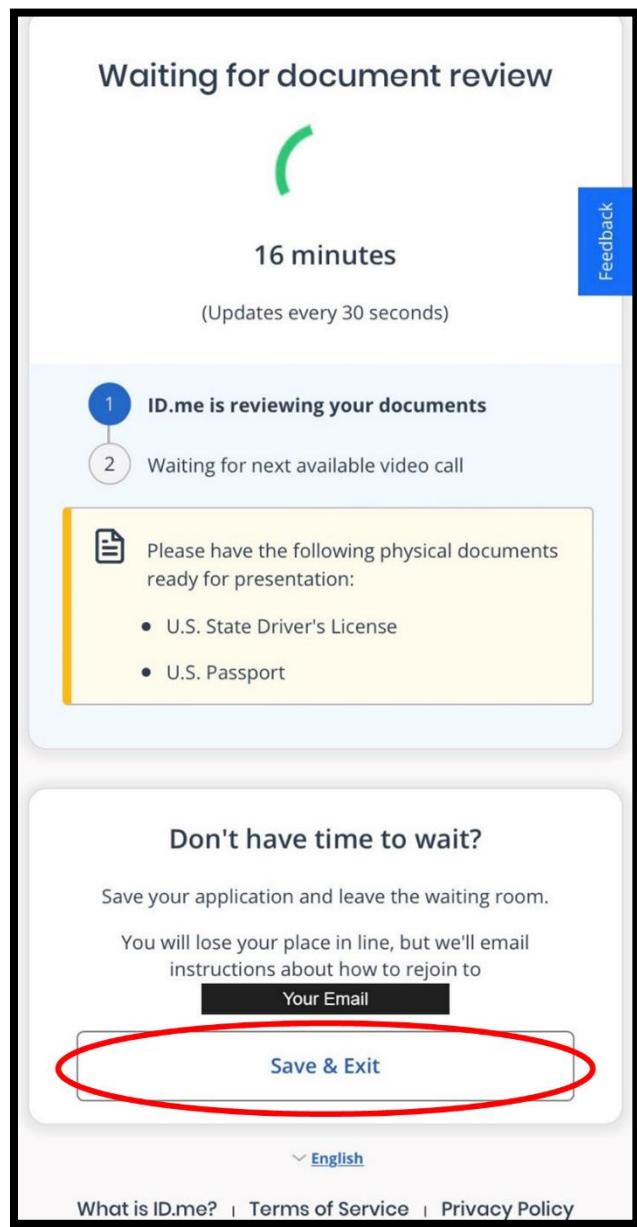
Appendix Step 3: Upload your documents for review

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.



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

Waiting for a video call

2 minutes
(Updates every 120 seconds)

1 Your documents have been reviewed

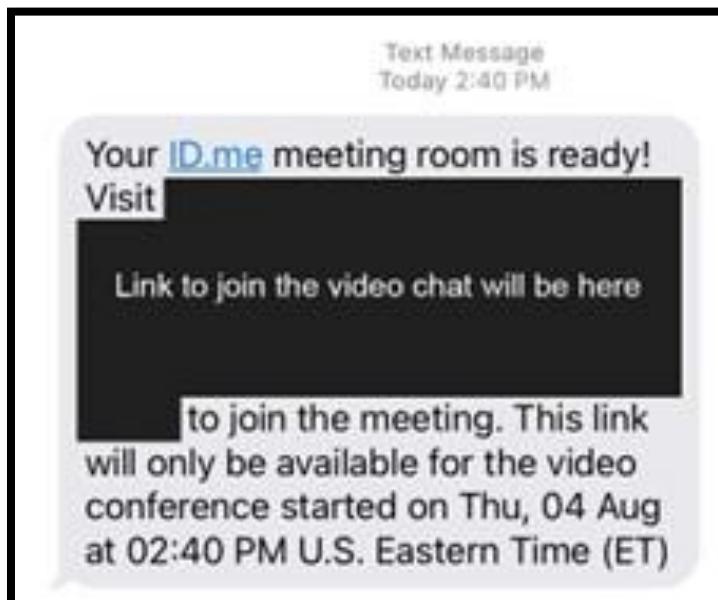
2 Waiting for next available video call

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:



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.

The image consists of two side-by-side screenshots. The left screenshot shows an email inbox with an email from 'ID.me' with the subject 'Action required to complete verification'. The 'Continue' button at the bottom of the email is circled in red. The right screenshot shows a confirmation page from ID.me with the heading 'VERIFY IDENTITY ON A VIDEO CALL' and the message 'Your identity verification is now complete'. It also includes a note: 'Please return to The Internal Revenue Service and log in with your ID.me account to make sure you are able to successfully log in.' At the bottom, it says 'You may now close this page.' and provides links to 'What is ID.me?', 'Terms of Service', and 'Privacy Policy'.