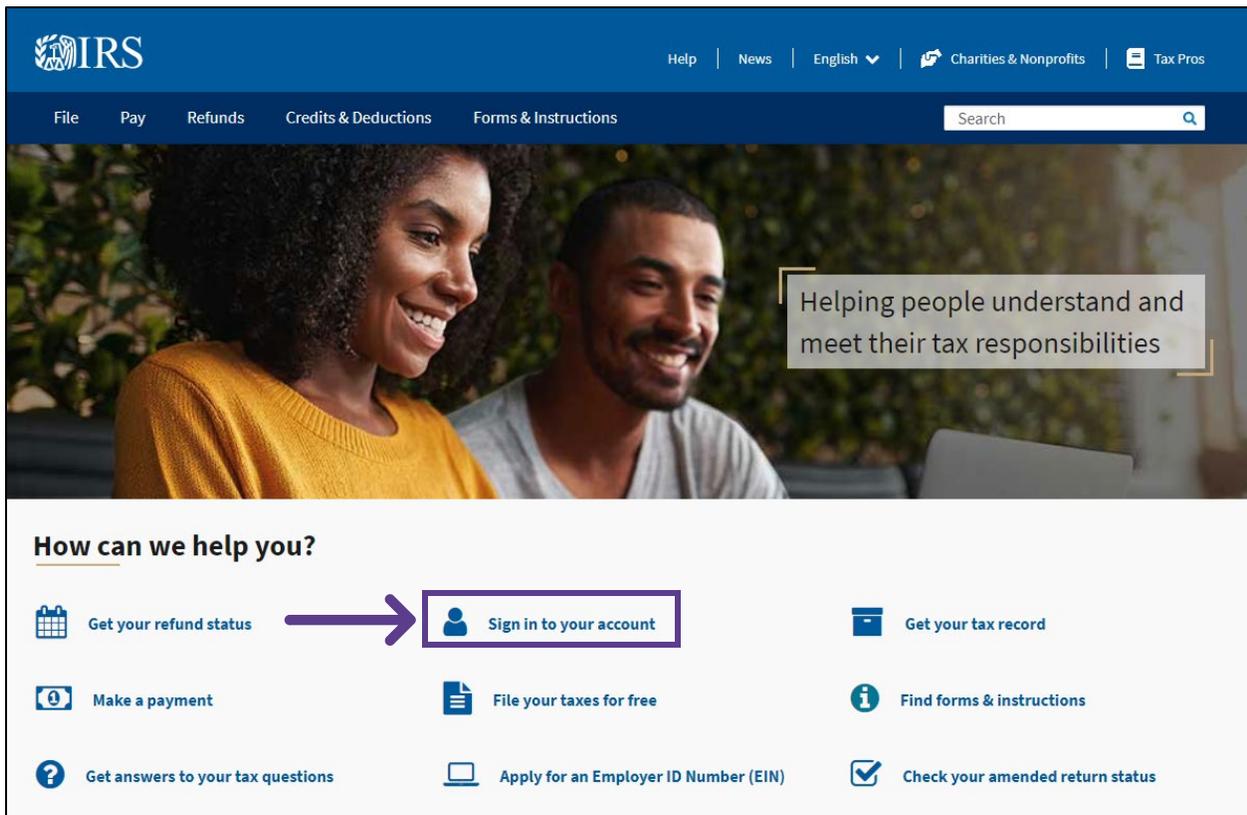1. It is recommended that the borrower have an account with the IRS prior to submitting the order for the fastest turnaround time. If the borrower does not have an account, one can be setup prior to your order by clicking the link on the left-hand side under Resources.

Resources
8821 Form
Set Borrower up with IRS account

2. This link will take you to irs.gov to begin the sign-in process. Click 'Sign in to your account'.

3. Select 'New to online account? Get started'.

Your account

Interactive Tax Assistant

Tools

Document Upload Tool

Report phishing

Fraud and scams

Notices and letters

Appeals

Frequently asked questions

Accessibility

Contact your local IRS office

Contact an international IRS

You can use an IRS account to check and manage your tax information.

Learn more or sign in

Use the same sign-in for 3 types of accounts. If you're a new user, have your photo identification ready.

Individual

Access your personal tax information, make payments and more.

Sign in to online account

New to online account? Get started

Business

View your business tax information, transcripts, balance due and more.

Sign in to business tax account

New to business tax account? Get started

Tax professional

Manage your authorizations and view your client information.

Sign in to tax pro account

New to tax pro account? Get started

For TDS, TIN matching and more, use e-Services.

4. Then, select 'Sign in to your online account'.

Online account for individuals

Individuals

Who should file

How to file

When to file

Access your individual account information including balance, payments, tax records and more.

Sign in to your online account

If you're a new user, have your photo identification ready. More information about identity verification is available on the sign-in page.

07/22/2024

5. Choose 'Create an account'.

Sign In or Create a New Account

ⓘ You only need one ID.me account

If you already have an account, don't create a new one. You can use the same ID.me account to sign in to different IRS online services.

IRS now offers a sign-in option with ID.me, which offers access to IRS online services with a secure account that protects your privacy.

ID.me is an account created, maintained, and secured by a technology provider.

If you don't have an ID.me account, you must create a new account.

Sign in with an existing account

Sign in with **ID**.me

———— OR ————

Create a new account

ID.me **Create an account**

6. Enter your email address and password, then check the box to accept the ID.me Terms of Service. When all is complete, click 'Create account'.

7. Click 'Continue'.

CONTINUING TO THE INTERNAL REVENUE SERVICE

To protect your identity and information from fraudulent actors, your authentication and transaction-related data (the information related to your ID.me account and identity verification) will be shared with the IRS. This helps ensure that it is really you interacting with the website and not someone pretending to be you.

This information includes transaction-related data like the following:

- Prior sign-ins using your ID.me account (but the names of the websites you access would not be disclosed)

- Multi-factor authentication methods (e.g., text message or push notification)

- The status of your verification (e.g., what steps you have or have not completed; partially entered information)

If you choose not to continue, you will not be able to use your ID.me account to access IRS.

Continue

8. Check your email for a 6-digit confirmation code. Enter the code and click 'Confirm code'.

CONFIRM YOUR EMAIL ADDRESS

We sent an email to

Click the link in our email

Check your inbox for an email from **hello@id.me** and click the link inside to confirm your email address.

If you do not receive an email within 10 minutes, check your spam folder and verify it hasn't been blocked.

Why do I need to confirm my email?

—————— OR ——————

Enter the 6-digit code from the email

Confirmation Code

000000

Confirm code

Didn't receive the email?

Resend my verification

9. Choose a multi-factor authentication (MFA) option and authenticate yourself using the option you chose. Upon completion, continue to the next step.

SECURE YOUR ACCOUNT

1 — 2 — 3

Choose a multi-factor authentication (MFA) option

With MFA, even if someone guesses your password, they won't be able to sign in as you.

Text Message or Phone Call
Get a 6-digit code by text message or phone call.

Push Notification
Approve sign-ins via push notifications sent to the ID.me Authenticator mobile app.

Code Generator Application
Generate verification codes via code generator apps like ID.me Authenticator.

Security Key
Use a physical security key (insert or tap) with your device.

NFC-Enabled Mobile Security Key
Tap a YubiKey™ security key to your phone using the ID.me Authenticator mobile app.

10. Next, select a method to verify your identity and click 'Continue'.

VERIFYING IS FAST AND EASY

Choose how to verify your identity from the options below

Self-Service

Takes 5–10 minutes

Upload a driver's license or state ID, passport or passport card, and capture a selfie.

Video Call

Takes 10 - 15 minutes

Upload a driver's license, state ID, passport, or passport card and join a quick video call.

Continue

I don't have a driver's license, state ID, passport, or passport card.

11. Read the consent information and check the acknowledgement box. Then, click 'Continue'.

Consent for ID.me to collect Biometric Data and Sensitive Personal Information

CONSENT FOR ID.ME TO COLLECT BIOMETRIC INFORMATION AND SENSITIVE PERSONAL INFORMATION

In the event of any discrepancy between a non-English version of this document and the English version of this document, the English version shall prevail in all respects.

BIOMETRIC INFORMATION PRIVACY STATEMENT

ID.me will not sell, rent, or trade your Biometric Information, and after verification you may request we delete your Biometric Information. Your Biometric Information will only be used by ID.me to verify your identity in accordance with the guidelines published by the National Institute for Standards and Technology or as required for the prevention of fraud. ID.me will transfer your Biometric Information to our third party partners only when required by a subpoena, warrant, or other court ordered legal action.

Notice and Consent

This Notice and Consent for the collection of Biometric Information, Personal Information and Sensitive Personal Information ("Consent") describes how ID.me

☑ I acknowledge that I have received, read, and agreed to these terms

Continue

Cancel

12. Follow the steps to verify your identity.
    a. Take a photo of your document
    b. Upload a picture of your document
    c. Use your phone camera to take a video selfie
    d. Enter your Social Security Number
    e. Review your information

13. Click 'Allow'.

AUTHORIZE THE INTERNAL REVENUE SERVICE

Before we send you back to **The Internal Revenue Service**, we need your permission to share your verified identity information.

Please note that only information obtained from the verification process will be shared.

The Internal Revenue Service will receive:

✓ First Name   ✓ Middle Name

✓ Last Name   ✓ Email

✓ SSN   ✓ Birth Date

✓ Phone   ✓ Street
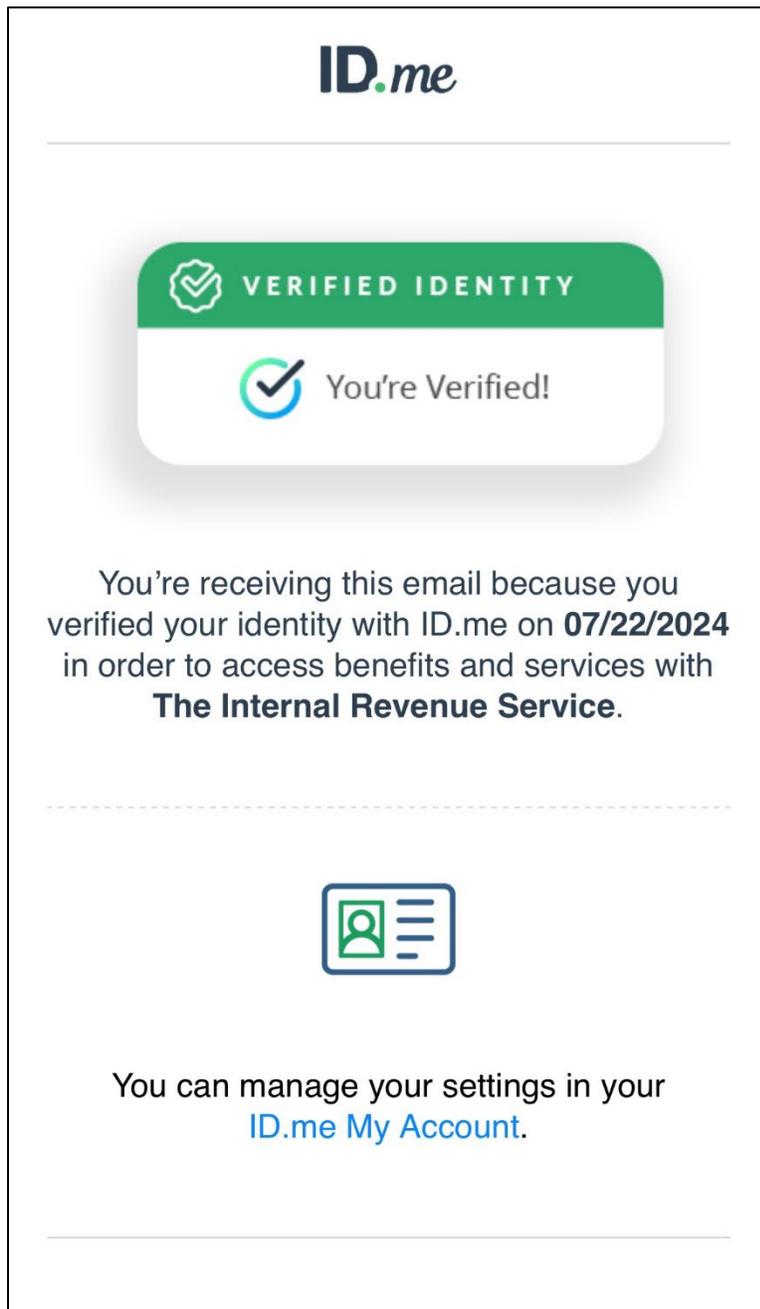
✓ City   ✓ State

✓ Postal Code

You can remove this access at any time by changing your **ID.me** account settings.

Allow

Deny

14. You will receive confirmation of your complete identity verification process and you are not ready to login through the IRS Sign-In page.

ID.me

VERIFIED IDENTITY

You're Verified!

You're receiving this email because you verified your identity with ID.me on **07/22/2024** in order to access benefits and services with **The Internal Revenue Service**.

You can manage your settings in your ID.me My Account.

15. If you need any additional information or assistance, please refer to the ID.me help guide for verifying for the IRS - https://help.id.me/hc/en-us/articles/4402761436823-Verifying-for-the-IRS

PLEASE LET US KNOW IF YOU HAVE ANY QUESTIONS OR CONCERNS AND WE WILL BE HAPPY TO HELP.

07/22/2024