

## **Create an IRS Account Online:**

We encourage clients to log into IRS.gov and create an account. Once set up you will be able access your tax information, including balance, payments, tax records, as well as all transcript types.

Use the following link to get started:

<https://www.irs.gov/payments/your-online-account>

### **What You Need**

If you don't have an existing IRS username or ID.me account, have your photo identification ready. Be sure to save your username and password. Log into your online account to:

- ✓ **Access Tax Records & Requests Transcripts online**
  - a. View key data from your most recent tax return and access additional records and transcripts
  - b. View your economic impact payment amounts
  - c. View Advance Child Tax Credit payment amounts
  - d. View digital copies of certain notices from the IRS
  
- ✓ **View Your Balance**
- ✓ **View or Create Payment Plans**
- ✓ **Make and View Payments**
- ✓ **Manage Communication Preferences**
- ✓ **View Tax Pro Authorizations**