

CREATING AN INDIVIDUAL IRS ACCOUNT

Creating a personal IRS account gives you immediate access to your tax information. You can view balances due to the IRS, make payments, see tax records, view adjusted gross income figures, and see lists of refunds, payments, and economic stimulus payment amounts.

***If your filing status is **married filing jointly**, both you and your spouse should create an account, as some figures are allocated to one or the other.**

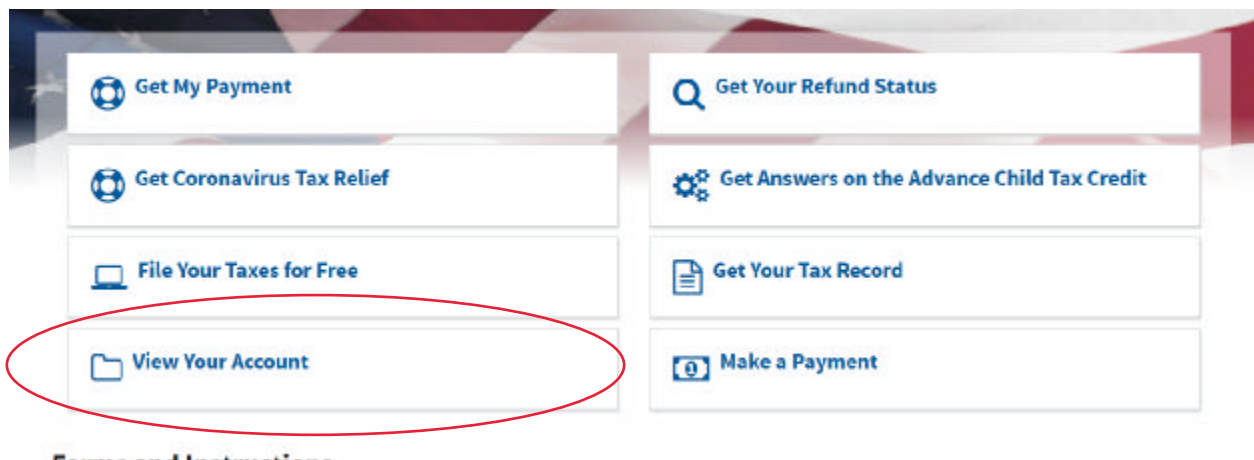
This account also gives you access to the Child Tax Credit Portal, where you can unenroll from the advance payments of the credit (2021), update pertinent information, and see payment history.

YOU WILL NEED THE FOLLOWING:

- Email Address
- Social Security Number
- Tax Filing Status
- One of the following to verify identity:
 - Last 8 digits of Visa, Mastercard, or Discover **credit** card
 - A debit card will **NOT** work.
 - Student Loan information
 - Mortgage/Home Equity Loan/Line of Credit information
 - Auto Loan information
 - ***If you cannot provide information about ONE of these, you will be unable to create an IRS account.**
- They will also want to send a code through text message to verify your identity. For some reason, not everyone's phone number qualifies for this method. If yours doesn't, they will mail an activation code via USPS to complete registration.

I HAVE THE INFORMATION, WHAT'S NEXT?

Once you have this information, go to IRS.gov and click "View Your Account"



Then click “Create or view your account” and follow the prompts to sign up.

Individuals

- How to File
- When to File
- Where to File
- Your Information

Online Account is an online system that allows you to securely access individual account information.

Create or view your account

You can view:

- The amount you owe, updated for the current calendar day
- Your balance details by year
- Your payment history and any scheduled or pending payments

If your identity cannot be verified via phone number, you may have to wait for a letter to arrive in the mail containing an authorization code. Once you receive the letter, use the log-in information you created to log into your account. The system will automatically prompt you to enter this code, completing your registration.

I'M IN. NOW WHAT?

Your homepage should contain all the links you may need to navigate this site. If you are here to update your information for the CTC advance payments, click the link at the top of the page to visit the Child Tax Credit Update Portal.

Important Message from the IRS

The [Child Tax Credit Update Portal](#) is now available. You can see whether you qualify for the [advance child tax credit](#) or unenroll from receiving payments. For other information and up-to-date status, see [IRS operations and services](#) and [Coronavirus Tax Relief](#).

Account Status

Total Amount Owed
as of July 1, 2021:

\$0.00

[View Balance Details](#)

Records

[View Tax Records](#) for:

- Key information from your most recent tax return
- Economic Impact Payment Information
- Downloadable tax records

[View Notices and Letters](#) for correspondence from the IRS

TO UNENROLL:

Click the “Unenroll from Payments” button at the bottom of the page. (If married filing jointly, both you AND your spouse MUST unenroll.)

UNENROLL FROM PAYMENTS

TO VIEW/CHANGE INFORMATION ON FILE:

If you would like to view your profile, click the “Profile” link next to your name, in the top right corner of the screen.



To change your payment method, click “Edit” next to Payment Info and enter your bank account information.

Payment Info

[Edit](#)

To change your payment method to direct deposit, select Edit.

Payment Method
Payment by Mail Sent to mailing address on file.

After entering your information, you will see a green box confirming when your update will take effect.

We will use your direct deposit information for your advance payments beginning in August. Until then, your profile will show the payment details for your July payment.

You do not need to submit another update or call us. Your account will show your updated payment information beginning August 2.