



MOORMAN, HARTING & COMPANY

CERTIFIED PUBLIC ACCOUNTANTS

moormanharting.com

Coldwater 815 West Main St. | P.O. Box 86 | P: 419.678.4814 | F: 419.678.2752

Celina 531 East Market St. | P: 419.586.6618 | F: 419.586.8812

How do I sign up for an ID.me account?

Before you get started with ID.me, you'll need the following:

1. Your Social Security number (you do not need the physical card)
2. A driver's license, US passport, or US passport card
3. A smartphone or computer with a camera

1. From the IRS website (www.irs.gov) click on the icon for Sign In to Your Account, and then click the button marked **Sign into your online account**. You'll be given the option of creating a new ID.me account or signing in to an existing account. Click the white **ID.me Create an account** button to start the registration process.
2. Next, **enter your email address and choose a strong password**. ID.me requires that passwords be eight characters or longer with at least one capital letter, one lowercase letter and a number. Confirm your password, click the check box to accept ID.me's terms and conditions and then click **Create account**.
3. ID.me will then send you a message to confirm your email address. Check your inbox for an email from ID.me, then click on the blue **Confirm your email** button in the message. Return to your browser.
4. Next you'll need to enable **multifactor authentication** -- a second step to prove it's actually you each time you sign in with your ID.me password. Most people will probably opt for a text message or phone call to their mobile phones. After selecting your MFA option, enter the six-digit code sent to you by ID.me and click **Continue**. You'll need to use this step every time you log in to your online IRS account.
5. Now you'll need to **add pictures of your photo ID**. You can upload photos or take pictures with your phone. You'll need to choose one of three acceptable ID options: US passport book, state driver's license, or US passport card. Upload pictures of both the front and back of your driver's license or passport. If you'd like to take new pictures of your document with your phone, enter your phone number and ID.me will send you a link.
6. After uploading your document, you'll need to **take and upload a video selfie** with your phone or computer camera. If you want to use your webcam, click the white **Take a selfie with my webcam** button. If you want to use your phone, click the blue **Take a selfie with my phone** button and enter your phone number and ID.me will text you a message with a link.
7. When taking your video selfie, be sure to position your phone in portrait mode and move your head very close to the camera. The background will flash different colors as it scans your face. When you see a green checkmark, your video selfie is complete. Click **Continue** and return to your original browser window.
8. Next **confirm your Social Security number** by entering it and clicking Continue.
9. ID.me will now present a summary of your personal information, including name, address and phone number. Confirm that everything is correct, check the "Fair Credit Reporting Act" check box and click **Continue**.
10. After confirming your identity, ID.me will send you a text message asking you to explicitly allow the IRS access. Although you won't need to register with ID.me again, you will need to "allow" every service you want to use it with, such as Social Security or VA.
11. Click **Allow and continue** on the ID.me message to send verification to the IRS.

12. Your IRS online account is now complete and active. The IRS logs you out of your account fairly quickly, so you'll likely need to visit the [Your Online Account](#) page to log in (with MFA) each time you want to use your IRS online account.

Please note, married taxpayers will need both the husband and wife to sign up through ID.me to have access to all of their tax records.

Moorman, Harting and Company cannot assist with the setup of ID.me accounts.

How to Access your Advance Child Tax Credit and EIP 3 Payment Information from your IRS Online Account

Advanced Child Tax Credit Payment Information

- Once logged into your IRS Online Account, select Tax Records from the menu at the top of the screen.
- You will see a section on this screen labeled Advance Child Tax Credit Payments with a link to the Update Portal. Click on this link
- Toward the bottom of the screen under the Payments Section, click on the plus sign next to Processed Payments. All payments that you received should be listed here. Please print a copy of this screen to provide to us.

Economic Impact Payment 3 (EIP 3) Payment Information

- Once logged into your IRS Online Account, select Tax Records from the menu at the top of the screen.
- Toward the bottom of the screen under the Economic Impact Payment Information section, click on the plus sign next to 2021. All payments that you received should be listed here. Please print a copy of this screen to provide to us.

If you disagree with any of the information provided on these screens, we recommend printing a 2021 account transcript. This can be done via the following steps:

- From your online account homepage, select Tax Records from the top menu
- Click on the blue box labeled Get Transcript
- Select reason for needing a transcript. You can choose any of these that you like,
- On the next screen, choose the 2021 Account Transcript at the bottom left of the screen. This will have the details on any payments made to you for the 2021 tax year.

Can't create or login to an IRS Online account? You can still have a transcript mailed to you.

- From the IRS website (irs.gov) select the icon for Get Your Tax Record
- On the next screen, Scroll down to the area discussing Alternative to Requesting a Transcript Online.
- There is a link here to Get a Transcript by Mail. Once clicking on this link, you will need to provide your Name, Social Security #, Address and Zip Code used on your most recent tax return. You will also need to select that you would like a 2021 Account Transcript. Once this information is entered, it takes 5-10 days to receive the transcript.
- You can also request a transcript by calling the IRS automated transcript request line at 1-800-908-9946. You will need the same information as listed above(Name, Social Security #, Address and Zip Code to request the transcript using this method.