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# TAX WALLET GUIDE

**2024**

Intuitive. Practical. Trusted.



# WELCOME

## Taxpayer Guide

This Guide will assist Taxpayers in the setup of ID.me on the IRS website as well as how to approve an Authorization Request.



### Recommendation: Create an IRS Account for Fastest Processing

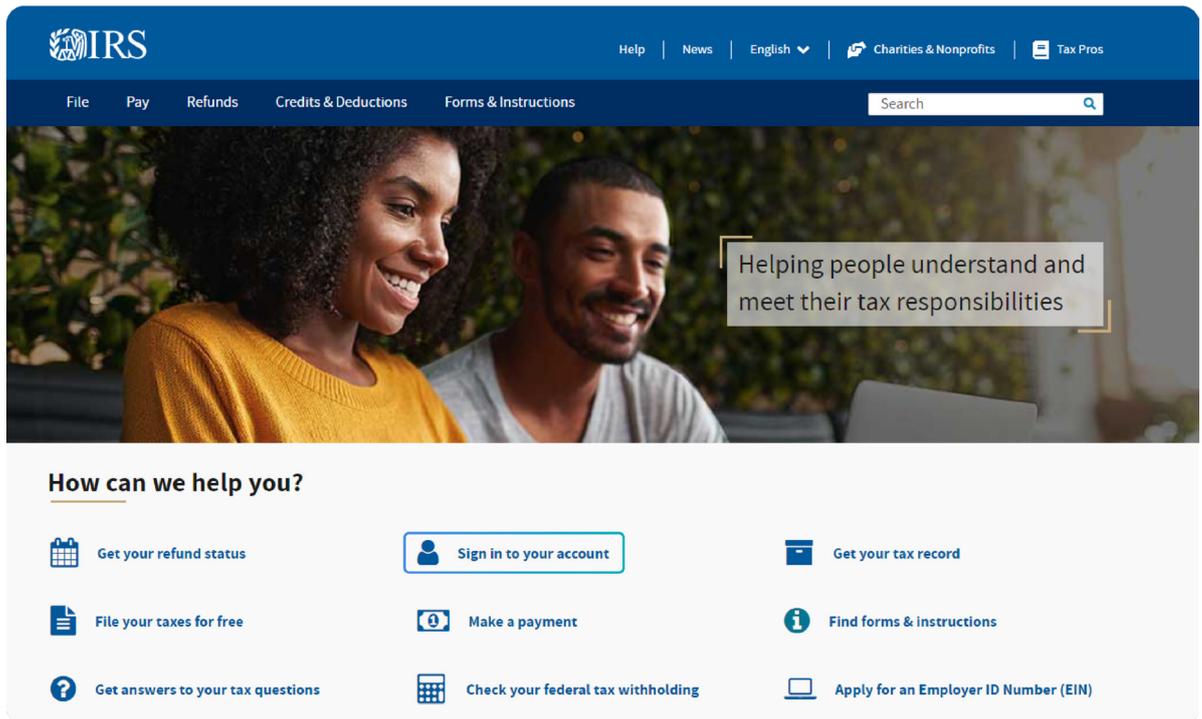
Improve your time by setting up your IRS account. With this account, you'll receive requested forms almost instantly, bypassing the potential multi-day delay of manual IRS processing. If you prefer not to use ID.me, alternative instructions are available on page 21

# GETTING STARTED

## Creating an IRS ID.me Account

The following will guide you through setting up your ID.me account on the IRS website. This is the preferred method for quickest results.

1) Go to: <https://www.irs.gov> and click **Sign in to your account**



2) Determine which type of account you need and then click **Sign in to online account**

### 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](#).

# GETTING STARTED

3) Click **Create an account**

## Sign In or Create a New Account

IRS now offers a sign-in option with ID.me, which offers access to IRS online services

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

4) Enter your **email** and create a **password**. Also **accept the Terms of Service and Privacy Policy**. Click **Create account**.

ID.me + 

### Create an ID.me account

Multiple ID.me accounts are not allowed.  
[If you have an ID.me account, use it to sign in.](#)

Need to use ID.me for work?  
[Follow these steps.](#)

\* Indicates a required field

Email \*

myemail@myemail.com

Password \*

Password

Confirm Password \*

.....

- Remember me  
For your security, select only on your devices.
- I accept the ID.me [Terms of Service](#) and [Privacy Policy](#) \*

Create account

# GETTING STARTED

## 5) Read the disclosures and 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**

## 6) You will receive an email with a **link** and a **6-digit code**. Click **confirm** from within the email or enter the code and click **Confirm Code** on your computer.

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 your email**

**Please note:** This link will expire in 15 minutes.

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Can't click the button in this email?

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

021463

**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

021463

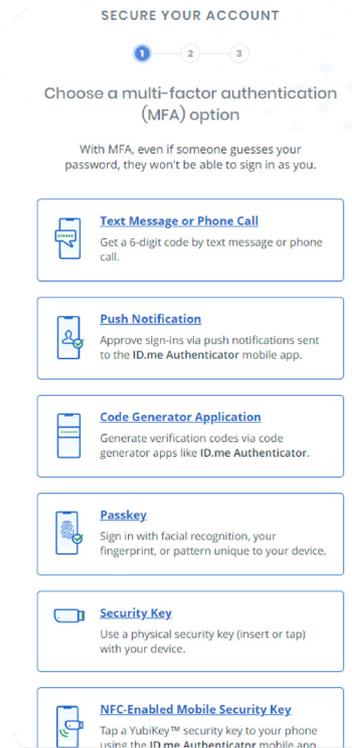
**Confirm code**

**Didn't receive the email?**

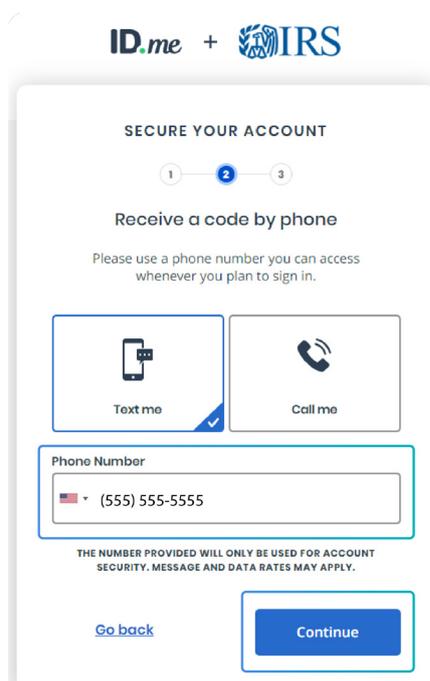
**Resend my verification**

# GETTING STARTED

## 7) Set up **Multi-factor Authentication** by choosing your preferred method



## 8) For example, **text message or phone call**. Choose **Text me or Call me** and add a Phone Number. Click **Continue**.



# GETTING STARTED

9) Confirm with **6-digit code** from text. Click **Continue**.

**ID.me** + 

**SECURE YOUR ACCOUNT**

1 — 2 — **3**

**Confirm your phone number**

Please pick up the phone and follow the instructions to receive your 6-digit code.

Enter the 6-digit code \*

Didn't receive it? [Resend my verification code](#)

[Go back](#)

10) Your account is now secure. Click **Continue**.

**YOUR ACCOUNT IS NOW SECURE**

Your phone number can now be used for multi-factor authentication.



Visit [ID.me My Account](#) to view and manage multi-factor authentication settings.

**Recovery code**

A recovery code can be used in the event you lose access to your multi-factor authentication device.

# GETTING STARTED

11) Select **Self-Service**. 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.](#)

12) Consent to collect **Biometric Data and Sensitive Personal Information**. 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](#)

# GETTING STARTED

13) Verify your **Phone Number**. Click **Continue**.

VERIFY YOUR IDENTITY

1 2 3 4 5

Take photos of your identity document

Enter a mobile phone number, then we'll text you a link to take photos of your identity document.

Identity Document

Driver's license or state ID [Change document](#)

Mobile Phone Number \*

Your smartphone must have a camera and a web browser.

By entering your phone number, you agree to receive notifications through text message or voice calls during sign-in attempts in order to protect your account.

[Continue](#)

[I don't have a smartphone](#)

14) A text message is sent to your smart phone. Click the **link** in the text message.

WAITING FOR YOUR PHOTOS...

1 2 3 4 5

Text sent to +15555555555



Please tap the link to upload photos.

Didn't receive the text message?

[Send it again](#)

This message is from [ID.me](#). Your identity is being used to log in to The Internal Revenue Service. Please click this link to upload a picture or to report unauthorized use of your identity: <https://verify.id.me/en/phones/5b004c1afc474b10a5e-b0cd28cdfdb05/authorize?vfp=Dbd5MJAP>

# GETTING STARTED

15) Click **Yes** to verify your email address.



**⚠ Be aware that fraudsters may:**

- **Create** fake postings including offers that seem too good to be true, such as fake jobs or apartments
- **Message** you on social media directing you to send personal information to them
- **Provide** instructions to complete actions for them

If you believe this is happening to you, STOP NOW and [report fraud](#).

Is this your email address?

myemail@myemail.com

Yes

16) Prepare your document and click **Start document upload**



## PREPARE YOUR DOCUMENT

Your document should be placed on a **well-lit** surface with a **dark background**.

Ensure that all 4 corners are visible.

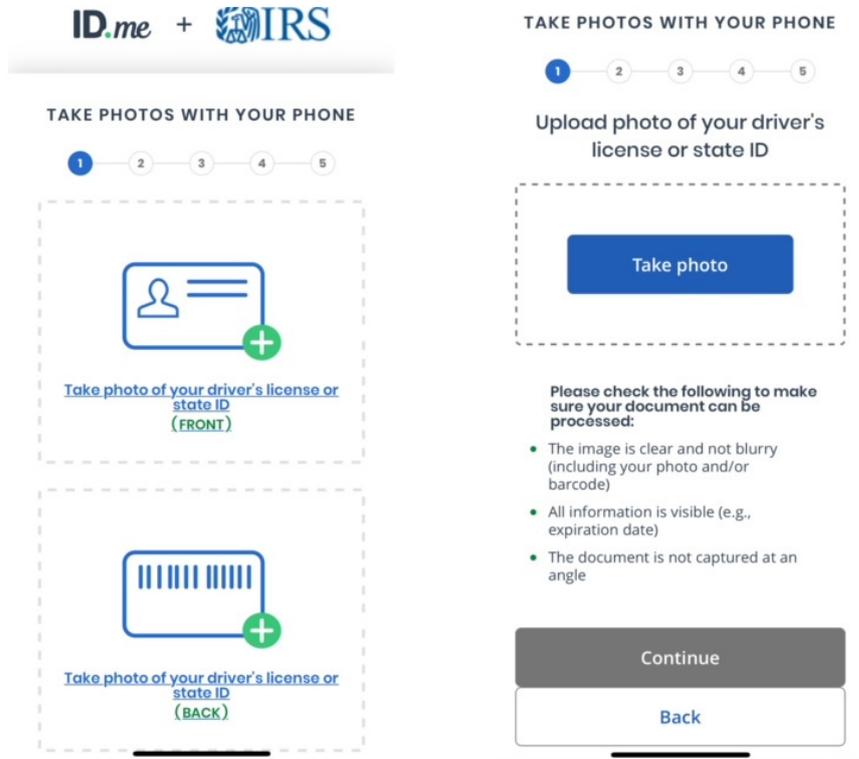
Your document should be:

- ✓ Valid and unexpired
- ✓ Clear and readable

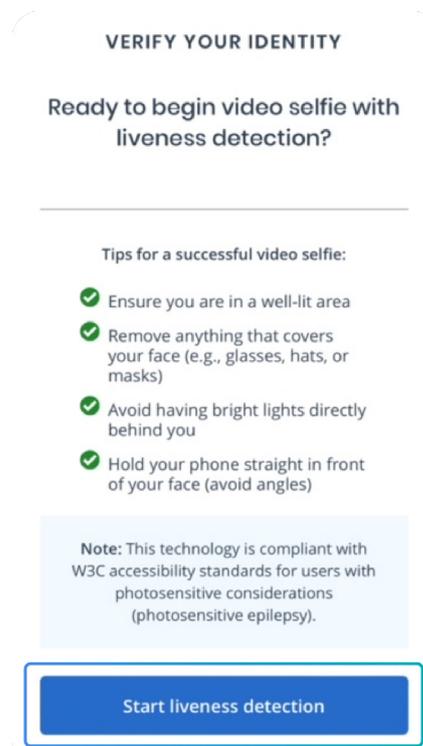
Start document upload

# GETTING STARTED

17) For **driver's license or state ID**, take a photo from your smart phone of front and back to upload.



18) Verify your identity by clicking **Start liveness detection**. Your smart phone will take a biometric picture of your face.



# GETTING STARTED

19) Enter **Social Security Number** and click **Continue**.

**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.

[Back](#) Continue

[I don't have a Social Security Number](#)

20) Verify **information** and **accept the use of Fair Credit Reporting Act data** to verify your identity. Click **Yes**.

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

What does this mean? ^

Personal information
First Name
Middle Name
Last Name
Date of Birth

Home address
Street
City
State
Zip Code

Phone number
Mobile Phone

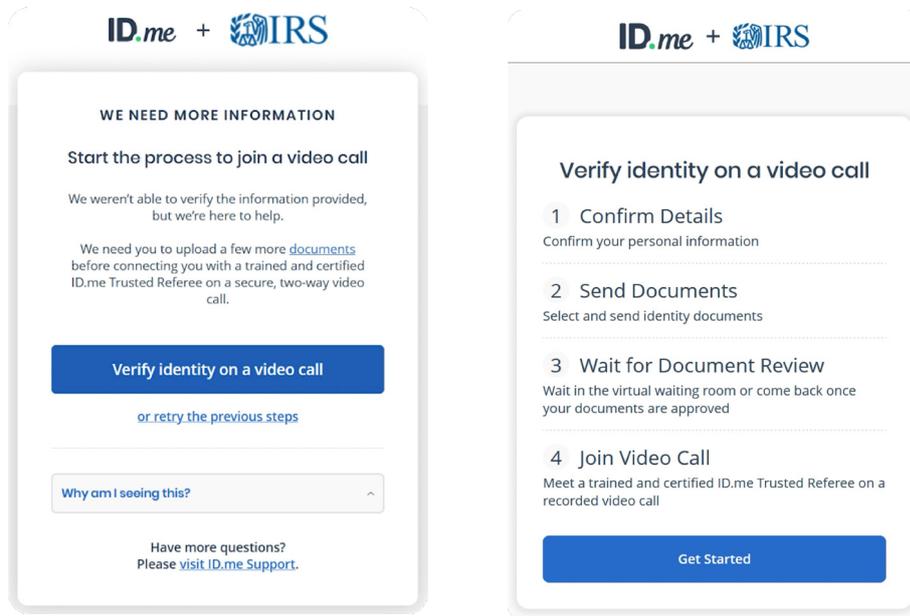
The information I've provided is correct, and I accept the use of [Fair Credit Reporting Act](#) data to verify my identity.

What is The Federal Fair Credit Reporting Act? ^

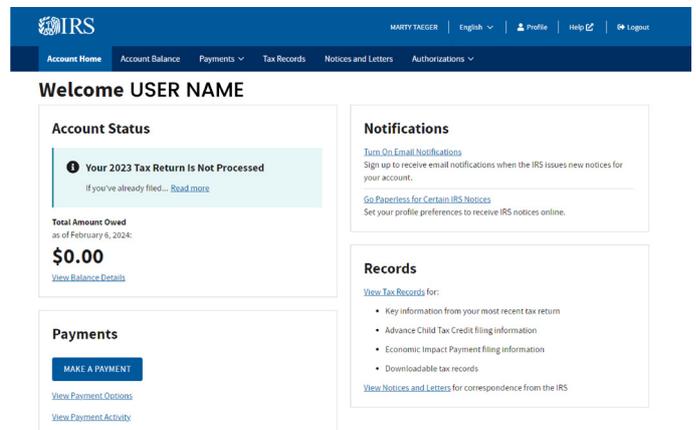
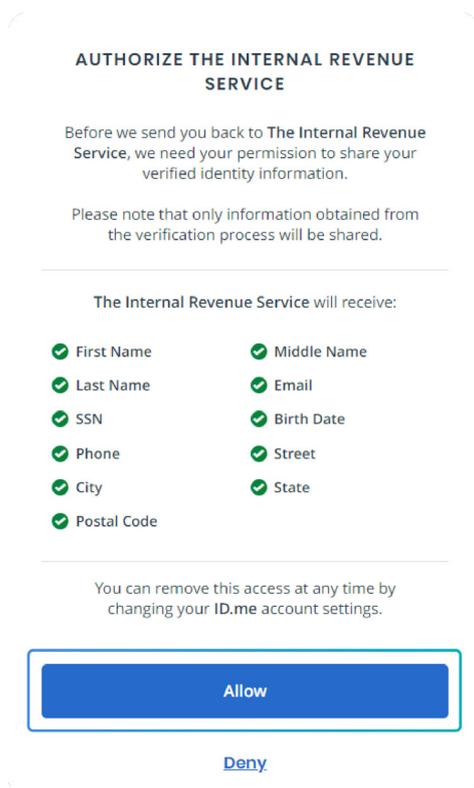
No Yes

# GETTING STARTED

\*\*\*Please note: If the IRS is unable to verify your identity, you will be directed to set up a video call to verify your identity through a video chat agent.\*\*\*

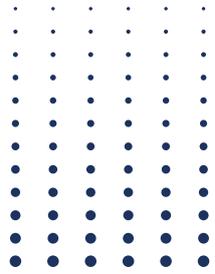


21) Click **Allow** to Finish. You will be taken to your **IRS dashboard**.



# Approving Authorization

Online Authorization  
Request *with*  
IRS Account



# APPROVAL AUTHORIZATION

1) Borrower will receive an email to let them know the IRS Account Authorization is needed.



## Provide Your Tax Documents

Hello [firstName] [lastName],

**A request for IRS tax transcripts was generated on your behalf. You will need to provide authorization on your IRS account in order for the request to be processed on this link: <https://www.irs.gov/>**

Steps to provide approval:

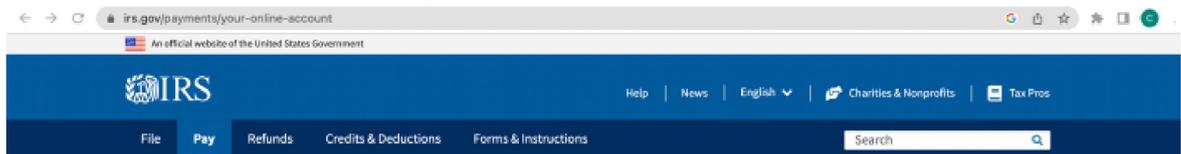
1. [Sign In \(irs.gov\)](#) Select "Sign into your Online Account".
2. Select the "Authorizations tab" then the "Power of Attorney and Tax Information Authorizations" option.
3. Scroll down to "Online Authorization Requests" section.
4. Select "Approve/Reject" option for the pending Online Authorization Request.
5. Scroll down and check both boxes under the "Sign and Submit" section of the request and click "Approve Request".

To see the detailed steps please click on this [Link](#)

From,  
The Halcyon Team

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2) Sign into <https://www.irs.gov/payments/your-online-account>. Click **Sign in to your Online Account**.



## Your Online Account

English | [Español](#) | [中文\(简体\)](#) | [中文\(繁體\)](#) | [한국어](#) | [Русский](#) | [Tiếng Việt](#) | [Kreyòl Ayisyen](#)

### 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 don't have an existing IRS username or ID.me account, have your photo identification ready. More information about identity verification is available on the sign-in page.

### Related Information

- [Frequently Asked Questions About Your Online Account](#)
- [Appeals](#)
- [Topic No. 653 IRS Notices and Bills, Penalties, and Interest Charges](#)

# APPROVAL AUTHORIZATION

3) Click **Sign in with ID.me**. Note: If you don't currently have an IRS account, you can choose **Create a New Account** and follow the above steps.



## Sign In or Create a New Account

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

4) Enter your **IRS credentials** and click **Sign In**

## Sign in to ID.me

New to ID.me?

[Create an ID.me account](#)

Email

johnsmith123@gmail.com

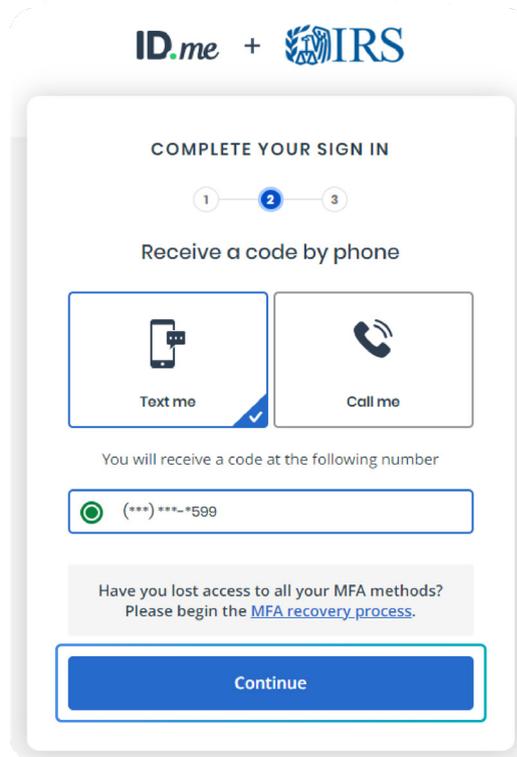
Password

.....

Sign in

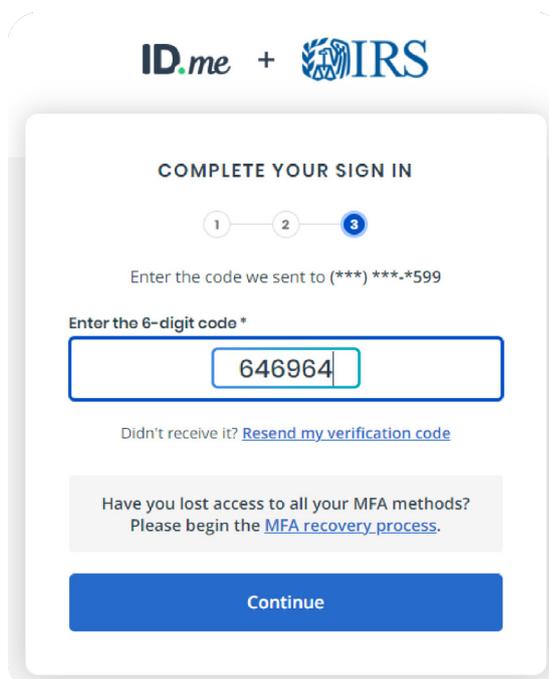
# APPROVAL AUTHORIZATION

5) Click **Continue** to receive a code by phone.



The screenshot shows the ID.me + IRS sign-in interface. At the top, it says "COMPLETE YOUR SIGN IN" with a progress indicator showing three steps, with the second step (2) highlighted. Below this, it says "Receive a code by phone". There are two buttons: "Text me" (with a checkmark) and "Call me". Below these buttons, it says "You will receive a code at the following number" followed by a text input field containing "(\*\*\*).\*\*\*-599". At the bottom, there is a "Continue" button.

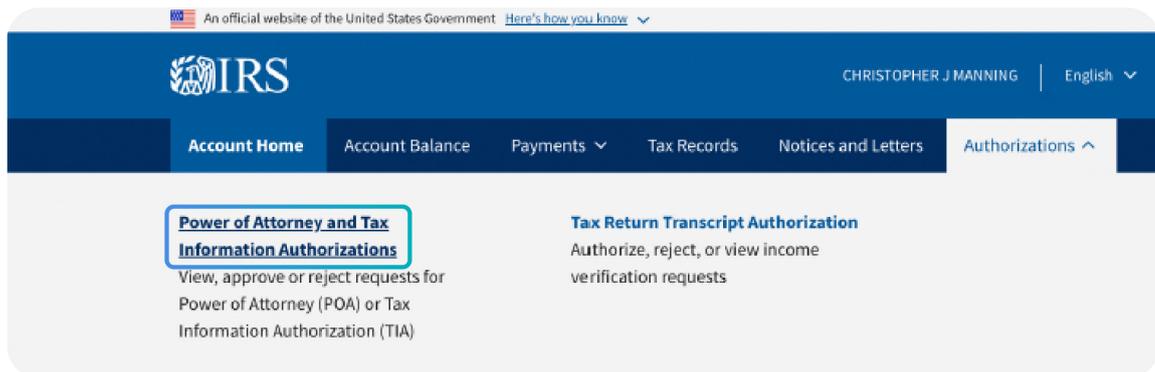
6) Enter **6-digit code** you received. Click **Continue**.



The screenshot shows the ID.me + IRS sign-in interface. At the top, it says "COMPLETE YOUR SIGN IN" with a progress indicator showing three steps, with the third step (3) highlighted. Below this, it says "Enter the code we sent to (\*\*\*) \*\*\*-599". There is a text input field labeled "Enter the 6-digit code\*" containing the code "646964". Below the input field, there is a link "Didn't receive it? Resend my verification code". At the bottom, there is a "Continue" button.

# APPROVAL AUTHORIZATION

7) Select the **Authorizations** tab, then click the **Power of Attorney and Tax Information Authorizations** option.



8) Scroll down to the **Online Authorization Request** section. Select **Approve/Reject** for the pending Online Authorization Request.

## Online Authorization Requests

Requests pending your action are deleted after 120 days. If a request is deleted, ask the requestor to send a new one to your account.

Requestor	Date Requested	Type	Status	Actions
Boonin, Elizabeth	08/31/2022	TIA	Approved	<a href="#">View</a>
Boonin, Elizabeth	11/28/2022	TIA	Approved	<a href="#">View</a>
Boonin, Elizabeth	11/30/2022	TIA	Approved	<a href="#">View</a>
Mcgowan, James	11/16/2022	TIA	Pending	<a href="#">Approve/Reject</a>
Mcgowan, James	11/28/2022	TIA	Pending	<a href="#">Approve/Reject</a>

# APPROVAL AUTHORIZATION

9) Check **both boxes** under the **Sign and Submit** section of the request. Click **Approve Request**.

Designee Information	
CAF Number <sup>?</sup>	0315-23889
Name	James Mcgowan
Address	203 Low Court, Flemington, NJ, 08822
Date Requested	November 16, 2022

Tax Information	
Tax matter	Form 1040 Income Tax
Tax Period(s)	2018 - 2025

**Sign and Submit**

If you want to approve the request, check both boxes and then select Approve Request.

By checking this box, I authorize the designated individual to receive confidential information described in this tax information authorization.

By checking this box, under penalties of perjury, I declare that, to the best of my knowledge and belief, all the entered information is true, correct, and complete.

10) Your Request is **Approved**.

## Power of Attorney and Tax Information Authorizations

### Tax Information Authorization Approved



#### Request Approved

James Mcgowan is authorized to receive your confidential tax information described in this authorization.