

Setting up EFTPS (Electronic Federal Tax Payment System)

EFTPS is the U.S. Treasury's secure system to pay federal taxes electronically.

Step-by-Step Setup:

Step 1: Enroll

- Go to: <https://www.eftps.gov/>
- Click **"Enroll"** (top menu bar)
- Choose your entity type: **Individual, Business, or Tax Professional**
- Enter the following:
 - **Taxpayer Identification Number (TIN)** (SSN or EIN)
 - **Bank account info** (routing number, account number)
 - Contact information

Step 2: Wait for PIN by Mail

- You'll receive a **PIN** and **Enrollment Confirmation Number** in the mail (typically within 5–7 business days).

Step 3: Log In and Set Password

- Return to EFTPS.gov, select **"Login"**
- Enter:
 - EIN/SSN
 - PIN (from mail)
 - Internet Password (create this during first login)

Step 4: Schedule Payments

- Once logged in, you can schedule:
 - **Estimated tax payments**
 - **Payroll deposits**
 - **Excise, corporate, or trust taxes**

Creating an IRS Online Account

This gives individuals access to their tax records, balances, payment history, and more.

Step-by-Step Setup:

Step 1: Go to IRS Online Account Portal

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

Step 2: Sign in or Create ID.me Account

- The IRS uses **ID.me** for identity verification.
- You'll need:
 - **Photo ID** (driver's license, passport, or state ID)
 - **Smartphone or webcam** for selfie match
 - **Social Security Number**

Step 3: Verify Identity

- Follow prompts to:
 - Uploading ID photo
 - Take a live selfie
 - Answer security questions (sometimes required)

Step 4: Access Account

- After verification, log in to:
 - View balance
 - Make or manage payments
 - Access transcripts
 - Get tax records

Managing Exceptions or Issues

Lost EFTPS PIN

- Call **EFTPS Customer Service**:
 - **Business**: 1-800-555-4477
 - **Individual**: 1-800-316-6541
- You'll need to verify identity and wait for a new PIN to be mailed.

Didn't Receive EFTPS PIN in Mail

- Wait **at least 7–10 business days**
- Check for address errors or call EFTPS

IRS Online Account Locked or Error

- If locked out of ID.me or IRS, go to ID.me help
- Resetting ID verification may be needed

Can't Access IRS Account with ID.me

- Call IRS Identity Verification Line: **800-908-4490**
- Or use IRS's "Get Transcript by Mail" as a workaround

Name or Address Doesn't Match IRS Records

- Fix this by:
 - Filing IRS Form **8822** (change of address)
 - Updating Social Security records (for name changes)