



### **Creating an IRS Account using EFTPS (Electronic Federal Tax Payment System)**

#### **IRS (<https://www.eftps.gov/eftps/>)**

- Choose Enroll
- Accept Privacy and Paperwork Reduction Act and select “Individual” or “Business”
- Enter demographic information: Social Security Number, name, address, bank account and routing numbers
- Review and Complete
  - At this point, EFTPS will mail you a unique PIN via USPS within 5-10 business days
- Once the PIN is received via mail, follow instructions on the letter to complete setup
  - Visit <https://www.eftps.gov/eftps/>
  - Choose My Profile
  - Select Need a Password
  - Enter SSN (EIN), PIN, and bank information and select Next
  - Set password and complete

### **Making a Payment via EFTPS**

#### **IRS (<https://www.eftps.gov/eftps/>)**

- Choose “Payments”
- Enter Tax Form number (1040, 1041, etc.) or select from drop down menu
- Select tax type (Estimated payment, payment with return, extension, amended return)
- Enter payment amount, period (tax year), and payment date
- Verify payment information and select “Make Payment”
- Email a copy of payment confirmation to your tax professional at WellsColeman

### **General EFTPS Information**

- EFTPS allows you to setup multiple payments in advance or make same-day payments
- You can cancel any pre-set payments, so long as you do so prior to two business days before the existing payment date
  - To do so, login to your account and select “Payments”

## **Creating a Virginia Department of Taxation Account**

VA ( <https://www.individual.tax.virginia.gov/IOP/#/login> )

- Choose Sign Up
- Enter SSN, AGI and tax year
- VA will send a security code to a phone number or mailing address on file within 5-10 business days.
- Once you receive the letter, go back to individual.tax.virginia.gov and choose Sign Up
- Enter SSN, AGI, and tax year
- Enter security code and complete account setup

## **Making a Payment via VA Department of Taxation**

Virginia ( <https://www.individual.tax.virginia.gov/IOP/#/payments/overview> )

- Once you have created an account, you may make estimated payments (now or schedule for a future date), extension payments, or balance due payments
- You can edit or cancel any scheduled payment at any point but must do so within 24 hours of the selected date
- Choose “Make a Payment” under the correct type of payment
- Estimated payments
  - Select Payment method
  - All upcoming estimated payment due dates will populate.
  - Enter the amount of the payment you wish to make and the payment date.
- Extension payments
  - Select Payment method
  - Enter payment amount and payment date
- Tax due
  - Select Payment method
  - Select appropriate tax year, enter payment amount and payment date
- Email a copy of your confirmation to your tax professional at WellsColeman