



FEDERAL ELECTRONIC PAYMENT INSTRUCTIONS

- Use the following link to access the IRS Payments section. <https://www.irs.gov/payments>
 - The link will lead you to a webpage that should look like this.

The screenshot shows the IRS website's 'Make a payment' page. At the top, there is a navigation bar with the IRS logo, a search bar, and links for Help, News, English, Tax Pros, and Sign in. Below the navigation bar, there is a breadcrumb trail: Home / Payments. The main heading is 'Make a payment'. To the right of the heading are language options: English, Español, 中文(简体), 中文(繁體), 한국어, Русский, Tiếng Việt, and Kreyòl ayisyen. On the left side, there is a vertical menu with the following items: Bank account (Direct Pay), Debit or credit card, Your online account, Business tax payment (EFTPS), Payment plan, Tax debt help, Penalties, Interest, Tax withholding, Foreign electronic payments, and User fees. The 'Bank account (Direct Pay)' item is highlighted. To the right of the menu, there are two yellow callout boxes. The first is titled 'Processing delays' and contains a warning icon and text: 'IRS is timely negotiating checks and payments with financial institutions. There is a delay in processing payments that need additional handling to ensure they post to the taxpayers account correctly. See [IRS statement on delay in processing some electronic payments](#).' The second is titled 'Separate assessment payment' and contains a warning icon and text: 'To make a separate assessment payment, you must make that payment through IRS [individual online account](#) or by check.' Below these callouts, there is a section titled 'Pay from your bank account' with the text: 'Pay now or schedule payments up to a year in advance.' At the bottom of this section is a blue button labeled 'Direct Pay with bank account'.

- Please choose your preferred payment method.
 - Pay from your bank account
 - Debit card, credit card or digital wallet
 - For individuals and businesses: Processing fees apply.
 - Pay from your IRS account
 - Note that an IRS account is not required in order to submit payment.
 - An IRS account could be used to view payment history associated with the online account.

If you have any questions, please contact the Client Success Team at support@yhbcpa.com or 1-800-495-4910.



Paying from your bank account

Pay from your bank account

Pay now or schedule payments up to a year in advance.

Direct Pay with bank account

1. Click Direct Pay with bank account.
2. Choose what kind of tax payments you would like to submit (i.e. Personal or Business.)

The screenshot shows the IRS website interface. At the top is a navigation bar with 'File', 'Pay', 'Refunds', 'Credits & Deductions', and 'Forms & Instructions'. Below this is the main heading 'Direct Pay with bank account' and a search bar. A left-hand menu lists various options: Bank account (Direct Pay), Debit or credit card, Your online account, Business tax payment (EFTPS), Payment plan, Tax debt help, Penalties, Interest, Tax withholding, Foreign electronic payments, and User fees. The 'Bank account (Direct Pay)' option is selected. The main content area includes a 'Processing delays' warning, 'Personal tax payments' section with a 'Make a payment' button, and a 'Business tax payments' section with a 'Look up a personal tax payment' button. Language options are listed at the top right of the page.

3. Follow the appropriate *link which should lead you to a webpage that should look like this.*

Pay personal taxes from your bank account

This screenshot shows the 'Pay personal taxes from your bank account' page on the IRS website. It features a similar layout to the previous screenshot, with a left-hand menu and a main content area. The 'Bank account (Direct Pay)' option is selected. The main content area includes a 'Pay personal taxes' section with a 'Make a payment' button, and a 'Look up a payment' section with a 'Look up a personal tax payment' button. The 'System availability' section at the bottom states 'Direct Pay is available:'. Language options are listed at the top right of the page.

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The following steps will be very similar between Personal & Business Payments.

The screenshots provided will showcase personal payments specifically estimated payments.

4. Click *make a payment (it will bring you to the following screen.)*

The screenshot shows the IRS Direct Pay interface. At the top is the IRS logo and the text 'Direct Pay' with a link for 'Have questions or need additional information? | Español'. Below this is a progress bar indicating 'Step 1 of 5'. The main heading is 'Tax Information'. A sub-heading reads: 'Select the appropriate payment type and reason for your payment. Information about payment types can be found by clicking the help icon (?). If you are making more than one type of payment or making payments for more than one tax year, submit each of them separately.' To the right, a box titled 'Business Taxes?' states: 'All business tax payments should be made through the IRS Direct Pay Business Payments Portal.' The form contains three sections: 'Reason for Payment' with a dropdown menu currently set to 'Select Reason'; 'Apply Payment To' with a dropdown menu set to 'Select Type'; and 'Tax Period for Payment' with an empty text input field. A 'CONTINUE >' button is at the bottom. At the very bottom, there are links for 'Acceptable Use and Privacy Policy | Privacy Notice | Accessibility | IRS.gov | USA.gov | Treasury.gov'.

5. Using the drop-down menu please select the reason for your payment
 - a. Example: if choosing Estimated Tax, the "Apply Payment To" & "Tax Period for Payment" sections will autofill if making personal payments.
 - b. You may be asked to confirm your selections are correct & accurate. Verify Identity (the screenshot below shows the information that would need to be filled out and verified prior to making a payment.

The screenshot shows the IRS Direct Pay 'Verify Identity' screen, Step 2 of 5. It features the IRS logo and 'Direct Pay' text with a link for 'Have questions or need additional information?'. A progress bar shows 'Step 2 of 5'. A note states: 'All fields with * are required.' The heading is 'Verify Identity'. Below this, it says: 'Direct Pay verifies your identity using information from your 1040 filing history. Please provide the following information from a 1040 tax return you filed for one of the years listed in the Tax Year for Verification drop down menu.' A note follows: 'Note: the Tax Year for Verification you enter here does not have to match the tax year for your payment.' The form includes: 'Tax Year for Verification *' with a dropdown menu; a note: 'The information you enter must match the information from your tax return for the tax year you selected above.'; 'Filing Status *' with a dropdown menu; 'First Name *' with a text input field; 'Last Name *' with a text input field; 'Confirm Last Name *' with a text input field; and 'SSN or ITIN *' with a text input field.

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*Notes to keep in mind.

- a. Tax Year for Verification will not be the same as the tax year being paid.
- b. Please ensure the identifying information entered matches the information provided in that tax year. *If your filing status was Single in 2023, note that your filing status was Single to help verify your identity.*
- c. Enter your name, SSN, and address exactly as it appears on the selected prior year's tax return — *Do not include any dashes (-), spaces () or periods (.) when inputting SSN or ITIN*
- d. Ensure to check off the Privacy Act & Paperwork Reduction Act prior to continuing.

[Privacy Act and Paperwork Reduction Act](#)

I accept the Privacy Act and Paperwork Reduction Act.*

< PREVIOUS

CONTINUE >

7. Enter Payment Info:

- a. Input your bank account or card details.
- b. Confirm the amount and email address for receipt.

8. Review and Submit:

- a. Review all details.
- b. Provide an electronic signature (by entering your SSN or ITIN).
Do not include any dashes (-), spaces () or periods (.) when inputting SSN or ITIN
- c. Click Submit to authorize the payment.

If you need further assistance with Direct Pay.

Follow this link: <https://www.irs.gov/payments/direct-pay-help>

Or

Contact the Client Success Team at support@yhbcpa.com or 1-800-495-4910