IRS Outreach Resources

You may add these messages to your agency's website or digital and hard-copy communications.

Where's My Refund?

- Where's My Refund? allows you to check the status of your tax refund online within 24 hours after the IRS receives your e-filed return or 4 weeks after you mail a paper return. Updates are made daily, usually overnight.
- The IRS issues more than 9 out of 10 tax refunds in less than 21 days. However, it's possible your tax return may require additional review and take longer to process.

Social media tweets:

Use #IRS online #tax tools. Get Transcript, Where's My Refund, Payment Options and more. Visit IRS.gov/help/tools #IRSonlinetools

Check the status of your refund with the #IRS "Where's My Refund?" tool or download the IRS2Go app. Learn more at https://www.irs.gov/newsroom/irs2goapp



IRS <u>YouTube Video</u>:

• When Will I Get My Refund? English

Interactive Tax Assistant

- If you have tax law questions, start with the <u>Interactive Tax Assistant (ITA)</u> on IRS.gov.
- The ITA provides answers to a number of tax law questions. It can determine if a type of income is taxable, if you're eligible to claim certain credits, and if you can deduct expenses on your tax return.
- The ITA also provides answers for general questions, such as determining your filing status, if you can claim dependents, if you have to file a tax return, etc.

Social media tweets:

Tax law questions? Start with the #IRS Interactive Tax Assistant on IRS.gov irs.gov/ita

It's easy to get answers to your tax questions by using #IRS online tools. Go to irs.gov/ita to use the Interactive Tax Assistant

IRS YouTube Video:

Interactive Tax Assistant – English | ASL

IRS PSAs & Podcasts:

• Got Tax Questions? – 30 second PSA – English | Spanish



Online Account

- Online Account allows individual taxpayers to access certain account information and tools via self-service online at IRS.gov/account, including:
 - o The amount you owe, updated for the current calendar day
 - Your balance details by year
 - Your payment history and any scheduled or pending payments
 - Key information from your most recent tax return, including your Adjusted Gross Income
 - o Payment plan details, if you have one

IRS Social Media Messages & Products: IRS Online Tools

- Digital copies of select notices from the IRS
- o Your Economic Impact Payments (EIP 1 and EIP 2), if any
- From Online Account you can also:
 - Make a payment online
 - o See payment plan options and request a plan via Online Payment Agreement
 - o Access your tax records via Get Transcript

Social media tweets:

DYK there's an easy way for you to access your tax account information online? Learn how with this #IRS video: IRS.gov/Account

Learn how to access your own tax account information online by watching this #IRS video: IRS.gov/Account

Do you need information from your most recent tax records? #IRS offers you access to your tax account information online. Learn more with this video tip: IRS.gov/Account

Need a record of an estimated tax payments you made? Learn how to access your personal tax records online with this #IRS video tip: IRS.gov/Account

You can now view your Economic Impact Payment amounts, if any, within your online account.

www.irs.gov/account

Use the #IRS online tool to review the status of your federal tax account. http://www.irs.gov/account

IRS YouTube Video:

Your Account on IRS.gov – <u>English</u>

Get Transcript

- It's important to keep a copy of the return once filed with the IRS. You may need it to electronically sign your return next year. You may also need it to apply for a student loan or a home mortgage. If you don't have a copy, you may be able to get a copy from the software you used to prepare your return, or you may ask your tax preparer for a copy if you had your return prepared professionally or at a free tax prep site. If those are not good options, you may use the Get Transcript self-help tool on IRS.gov.
- <u>Get Transcript</u> allows you to get various <u>transcript types</u> online or by mail. You may register to use <u>Get Transcript Online</u> to view, print or download all transcript types.
- The quickest way to get a copy of your tax transcript is to use the <u>Get Transcript</u> application on <u>IRS.gov</u>.
- Transcripts partially mask the personally identifiable information of everyone listed on the tax return. All financial entries will remain fully visible to assist with tax preparation, tax representation and income verification.
- If necessary for return preparation, a taxpayer or their authorized representative may also order a complete (not redacted) wage and income transcript through the IRS.
- If income verification is needed (for example, from a lender or a college financial office), the taxpayer can manually enter a Customer File Number which will appear on the transcript.
- For more information on Get Transcript, read the Get Transcript Frequently Asked Questions on IRS.gov

IRS Social Media Messages & Products: IRS Online Tools

Social media tweets:

With Get Transcript, you can access your tax records when you view your online account. http://www.irs.gov/transcripts #IRSonlinetools

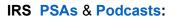
No need to wait. Get your tax transcript at http://www.irs.gov/transcripts #IRSonlinetools

View and print your tax transcript online. Visit http://www.irs.gov/transcripts#IRSonlinetools

Need a copy of your tax transcript mailed? It'll arrive

in 5 to 10 calendar days at the address #IRS has on file for you http://www.irs.gov/transcripts

Need your tax transcript for a home or student loan? Get a copy online from #IRS. http://www.irs.gov/transcripts #IRSGetTranscript #IRSonlinetools



• Transcripts – 30 second PSA – English | Spanish

Electronic Payment Options

- The IRS offers several payment options to pay tax bills. You can pay online, by phone or from your mobile device. Visit IRS.gov/payments on IRS.gov today.
- You can use <u>IRS Direct Pay</u> anytime to pay your taxes directly from your checking or savings accounts at no
 cost to you. You will receive confirmation after you submit your payment, and you can schedule your
 payment up to 365 days in advance. You can opt in to receive email notifications about your payments each
 time you use Direct Pay.
- When you're electronically filing your taxes, you can use the <u>electronic funds withdrawal</u> to pay your tax bill
 from your bank account. You can schedule your payment any time before your taxes are due. You may also
 pay with your <u>debit or credit card</u> when you e-file.
- You can pay your taxes by phone, mobile device, online through any of the secure <u>debit and credit</u> payment processors. You can also pay through these payment processors using digital wallet options. Though the IRS does not charge a fee for this service, the card processors do.
- The quickest, easiest way to make a tax payment is <u>online</u>. If you prefer to pay in cash, the IRS offers a way
 for you to pay your taxes at a <u>participating retail store</u>. It generally takes two business days to process your
 payment so planning ahead is important.

• If you can't pay in full, you can check on applying online for a payment plan. If you are a qualified taxpayer

or authorized representative (Power of Attorney) you can apply for a payment plan (including installment agreement) online to pay off your balance over time.

Social media tweets:

Need to make a tax payment? IRS #DirectPay is the easiest way for individuals to make federal #tax payments. http://www.irs.gov/payments #IRSonlinetools

Can't pay a tax bill? Check the #IRS Online Payment Agreement tool on http://www.irs.gov/payments

IRS YouTube Videos:

- Easy Ways to Pay My IRS Taxes English | Spanish | ASL
- Need a Payment Plan? <u>English</u> | <u>Spanish</u> | <u>ASL</u>



WIRS



IRS PSAs & Podcasts:

Payment Options – 30 second PSA – English | Spanish

Tax Withholding Estimator

- Use the <u>Tax Withholding Estimator</u> to perform a Paycheck Checkup to help you decide if you need to adjust your withholding or make estimated or additional tax payments.
- Having too little tax withheld can mean an unexpected tax bill or even a penalty at tax time. You can use the Tax Withholding Estimator to estimate your 2021 income tax.
- The fastest and easiest way to determine your proper withholding is to start with the Tax Withholding Estimator on IRS.gov. When you enter the information requested by the estimator, it will tell you if you should change your withholding and provide instructions for completing a new Form W-4.

Social media tweets:

Online tool makes it easy to do a #PaycheckCheckup. Try the Tax Withholding Estimator today: www.irs.gov/withholding

The Tax Withholding Estimator makes specific withholding recommendations for each job and each spouse and clearly explains what steps to take next. www.irs.gov/withholding

IRS YouTube Videos:

- IRS Tax Withholding Estimator English | Spanish | ASL
- Tax Withholding Estimator (webinar) <u>English</u>



IP PIN

- Taxpayers can enroll in the IRS's <u>Identity Protection PIN program (IP PIN)</u> to protect their identities from tax filing identity theft. It is an opt-in program available to all taxpayers who can verify their identities. An IP PIN is a six-digit code known only to the taxpayer and the IRS. The IRS will reject electronic returns not having the correct IP PIN, and paper returns will go through added scrutiny for fraud.
- IP PINs help prevent identity thieves from filing fraudulent tax returns using a taxpayers' personally identifiable information.
- You must enter the correct IP PIN on electronic and paper tax returns to avoid rejections and delays. An
 incorrect or missing IP PIN will result in the rejection of your e-filed return or a delay of your paper return
 until the IRS can verify it.
- Don't reveal your IP PIN to anyone. It should be known only to your tax professional and only when you are ready to sign and submit your return. The IRS will never ask for your IP PIN. Phone calls, email or texts asking for your IP PIN are scams.
- Taxpayers who receive Forms 1099-G for unemployment benefits they did not actually get because of
 identity theft should request a corrected form from their appropriate state agency. Taxpayers should file an
 accurate return including the income they actually received.

Social media tweets:

#IRS has expanded the IP PIN Opt-In Program to all taxpayers who can verify their identities. To learn more visit: www.irs.gov/ippin

An IP PIN is a six-digit code that helps prevent identity thieves from filing fraudulent tax returns using your personally identifiable information. Sign up with #IRS at: www.irs.gov/ippin

An IP PIN helps you lock your tax account from identity thieves trying to file fraudulent tax returns using your information. To learn more about this #IRS program visit: www.irs.gov/ippin

The #IRS IP PIN can help protect you from tax-related fraud. To learn more or to sign up visit: www.irs.gov/ippin

IRS YouTube Videos:

- Get an Identity Protection PIN: English | Spanish
- IRS Phone Scams: English | Spanish | ASL
- W-2 Scam: English | ASL

IRS publications and other links:

- Publication 5367, Identity Protection PIN Opt-In Program for Taxpayers <u>English and Spanish</u>
- Publication 5477, All taxpayers now eligible for Identity Protection PINs <u>English</u> | <u>Spanish</u>
- Data Theft Information for Tax Professionals: <u>English</u>: Steps you can take to avoid becoming a target of cybercriminals.
- Protect Your Clients; Protect Yourself: Tax Security 101:
 English | Spanish: Provides basic information to better protect taxpayer data and help prevent the filing of fraudulent tax returns.

Economic Impact Payments and Recovery Rebate Credit

- Economic Impact Payments are being sent in large batches to millions of Americans.
 - Batches and payments will be sent in the coming weeks by direct deposit and through the mail as a check or debit card.
 - o The vast majority of Economic Impact Payments will be issued by direct deposit.
 - Eligible families will get \$1,400 per person, including all of their qualifying dependents claimed on their return, including older relatives like college students, adults with disabilities, parents and grandparents.
- If you're <u>eligible</u> and either didn't receive Economic Impact Payments or if you think you qualify for more than you received you'll need to file a 2020 tax return and claim the <u>Recovery Rebate Credit</u> even if you otherwise are not <u>required to file a tax return</u>.
- When people file their 2020 returns and claim the 2020 <u>Recovery Rebate Credit (RRC)</u>, they may
 receive a notice from the IRS adjusting their credit amount. These IRS letters explain why some 2020
 Recovery Rebate Credits are different than expected. The IRS urges people to read the notice, then
 review their return, and RRC worksheet/eligibility requirements in <u>Forms 1040 and 1040-SR</u>
 <u>instructions</u>.







IRS YouTube Video:

 IRS Economic Impact Payments and the Recovery Rebate Credit <u>English</u> | <u>Chinese</u>

IRS publications and other links:

- <u>Publication 5494</u>, IRS Toolkit for Partners: Helping Individuals with the 2021 Tax Filing Season and the 2020 Recovery Rebate Credit
- Publication 5478, IRS Free File available now. Claim the Recovery Rebate Credit & other tax credits
 English | Spanish

Filing a tax return to claim the Recovery Rebate Credit?

Using IRS Free File to

file electronically for free can be the cherry on top.

www.irs.gov/freefile MIRS

- Publication 5486, Claiming the Recovery Rebate Credit on a 2020 Tax Return <u>English | Spanish | Chinese-Simplified | Korean | Russian | Vietnamese | Haitian Creole</u>
- Publication 5486-A, Claiming the Recovery Rebate Credit When You Don't Normally File a Tax return English | Spanish

American Rescue Plan Act of 2021

Third Economic Impact Payment

https://www.irs.gov/coronavirus/third-economic-impact-payment

2021 Advance Child Tax Credit on IRS.gov:

• https://www.irs.gov/credits-deductions/advance-child-tax-credit-payments-in-2021

Tax Treatment of Unemployment Benefits:

• https://www.irs.gov/newsroom/tax-treatment-of-unemployment-benefits

More information

There are many <u>online tools</u> available on IRS.gov that taxpayers may find useful such as the <u>Volunteer Income</u> <u>Tax Assistance Locator</u>, <u>Free File</u>, the <u>Directory of Federal Tax Return Preparers</u> and more.

Social media tweets:

Use #IRS online #tax tools. Get Transcript, Where's My Refund, Payment Options and more. Visit IRS.gov/help/tools #IRSonlinetools

Getting ready to file your 2020 tax return? Read these important #IRS reminders: https://go.usa.gov/xAtk5

It's been an unpredictable year with many changes and challenges. #IRS has a few reminders to help you file your 2020 tax return. Read: https://go.usa.gov/xAtk5

#IRS has important reminders for taxpayers who are about to file their 2020 federal tax returns. See: https://go.usa.gov/xAtk5

Your 2020 federal tax return may look different from previous years' returns. Review these #IRS reminders before filing: https://go.usa.gov/xAtk5

IRS PSAs & Podcasts:

Self-Help Options – 30 second PSA – English

IRS publication:

Publication 5136, IRS Services Guide English | Spanish