Instructions for Making Tax Payments Online

The IRS & Arizona offer online payment options. Making payments in this manner creates an electronic record of your payment and gives you a confirmation number that you can record or print for your records. This eliminates the potential for payments to be lost in the mail. It also causes your payments to be recorded on your record faster, which can reduce the likelihood of your receiving correspondence asking for payments they simply have not yet processed.

If you would like to make payments online please visit the payment websites below. While detailed prompt instructions are provided below based on current information, you may see slight changes made after these instructions were created. Most clients have told us they found the process simple enough to follow the prompts.

<u>Federal Tax:</u>
1. Visit https://www.irs.gov/payments
2. Choose to pay by:
    a. Direct Pay with bank account – No fees (our favorite), or
    b. Pay by card or digital wallet – Fees will apply, you will be given the option to choose a payment processor from a list on the next screen that includes their fees.
3. You will choose to "Pay individual tax"
4. Choose the button titled "Make a Payment"
5. From the "Reason for Payment", "Apply Payment To", and "Tax Period for Payment" drop down menus, select as follows, then choose Continue at the bottom:
    a. If your tax returns have been finalized and you are paying the balance owed from Form 1040-V, select "Balance Due", "Income tax – Form 1040", and the tax year for your payment (Most payments made currently are for tax year 2024).
    b. If your tax returns have not yet been finalized and you:
        i. Are making an estimated payment to be applied to your extension request select "Extension". It should auto-fill "Apply Payment to = 4868" and "Tax Period for Payment = 2024".
        ii. Are making an estimated payment not shown on your extension request (either before asking for an extension with payment amount, or payment after the April 15th deadline) select "Estimated Tax". It should auto-fill Apply Payment to = 1040ES" and "Tax Period for Payment = *2025*".
            1. *Beware* If this is an estimated payment for tax year 2024 please change the Tax Period for Payment to **2024**.
6. Choose your most recent "Tax Year for Verification" and provide the following information from your copy of that year's return:
    a. Select your filing status from the "Filing Status" drop down menu (Single, Married Filing Joint, Head of Household, or Married Filing Separate). See just below your name and address on page 1 the federal return (Form 1040) or Arizona return (Form 140) for the prior year return,
    b. Complete your identity information from the prior year return and Continue
7. Follow remaining prompts to complete your payment
8. Record the information from the confirmation screen or print it for your records.

<u>Arizona Tax:</u>
1. Visit https://www.aztaxes.gov/Home/PaymentIndividual/
2. Choose the circle next to "Individual"
3. From the "Payment Type" drop down menu, select the type of payment being made:
   a. If your tax returns have been finalized and you are paying the balance owed from Form 140-V, select "140V: Individual Payment Voucher",
   b. If your tax returns have not yet been finalized and you:
      i. Are making an estimated payment to be applied to your extension request select "204: Individual Extension Payment"
      ii. Are making an estimated payment not shown on your extension request (either before asking for an extension with payment amount, or payment after the April 15th deadline) select "140ES: Individual Estimated Payment".
4. From the "Filing Status" drop down menu, select your filing status (Single, Married Filing Joint, Head of Household, or Married Filing Separate). If you are unsure you can check your return (or prior year return assuming your status has not changed) just below your name and address on page 1 the federal return (Form 1040) or Arizona return (Form 140).
5. Click the "I'm not a robot" box and hit "Continue".
6. Choose the "Tax Year" for the payment you are making. Most payments made currently are for tax year 2024 for example. Then complete the rest of the form and hit "Continue".
7. Choose your "Payment Method".
   a. ECheck if paying from bank account (routing & account numbers will be collected on the next screen). Or,
   b. Credit Card.
8. Record the information from the confirmation screen or choose "Click here to print" near the top.

If you are making an estimated payment prior to your returns being completed Please be sure to tell us about your payment. You can call, email, or come to the office with your confirmation information or printout so your preparer can include your payment when preparing your tax return.

If you run into challenges, please don't hesitate to give us a call. If all else fails, we can assist by preparing paper vouchers and offering to mail your payments by check instead.