IRS e-Services Registration

For Form 8947 and Form 8963

What is e-Services?

- e-Services is a suite of products designed for tax professionals and taxpayers to do business with IRS electronically.
- e-Services includes:
 - Registration
 - IRS e-file Application
 - Tax Identification Number (TIN) Matching Application
- e-Services is accessed through a secured environment known as the "Registered User Portal (RUP)".

Why do I have to register?

- All ACA report filers and tax professionals who wish to e-file reports must register online to create an individual electronic account with e-Services.
- The registration process is a one-time automated process where the user selects a username, password and PIN.

What do I need for my e-Services Registration?

- You are registering as an individual representing your organization.
- IRS needs to authenticate you.
- Authentication is achieved by:
 - Providing "shared secrets" to corroborate your identity (combination of name, Social Security Number, Date of Birth and Adjusted Gross Income from current or one previous tax year)
 - Further authentication by mailing a registration confirmation number to your official IRS address of record (from your latest return filed)

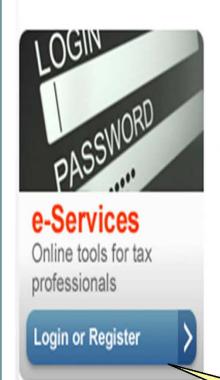
How do I register?

 Access the application via e-Services at www.irs.gov/eservices

OR

- Go to IRS.gov
- Search for "eservices"
- Select "e-Services Online Tools for Tax Professionals"
- Select "Login or Register" on the left side of the screen

e-Services – Online Tools for Tax Professionals



e-Services - Online Tools for Tax Professionals

e-Services is a suite of web-based tools that allow tax professionals and payers to complete certain transactions online with the IRS. The tools include Registration Services, e-file Application, Transcript Delivery and TIN Matching. These services are only available to approved IRS business partners as noted below and not to the public.

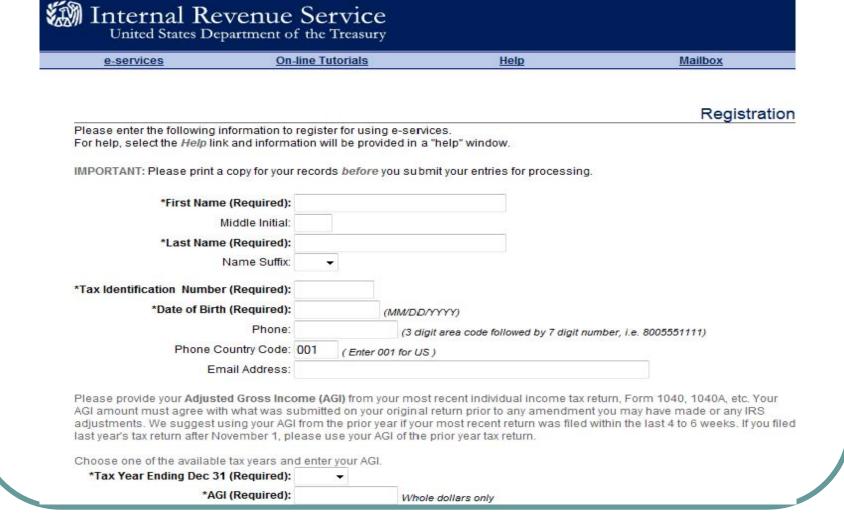
Authorized business partners who need assistance using the online tools can contact the e-help Desk at 1-866-255-0654. International callers must dial 512-416-7750.

Select "Login or Register"

Registration



Provide the Registration Information



Provide the Registration Information

Please select your preferred Username, Password and Persona (You must type password and PIN twice)	Ildentification Number (PIN).
Rules governing the creation of the Username, Password, and P The most commonly encountered rules are identified below. <u>Sek</u>	IN have been created to further enhance the security of e-services. ect this link to see the full set of password and PIN rules.
*Username (Required):	Username must be at least 8 characters long, may contain letters and numbers only, case insensitive (read as upper- case only).
*Password (Required):	Password must be at least 8 characters long, must contain both letters and numbers, case sensitive, cannot be the
*Re-Enter Password (Required):	same as the username.
*PIN (Required):	PIN must be 5 digits only, cannot be all the same digits.
*Re-Enter PIN (Required):	
Please select one question to be answered by you if you forget question and answer should be unlikely to be known by other is currently live or the car you own today. *Question to Recover Username (Required): What is your mother's	ndividuals. For example, do not select your street where you
*Answer (Required):	
The last address you provided the IRS on your individual tax reused to send you a registration confirmation number. You in Upon confirmation of your registration, we will update your secondary taxpayer on a joint return, we will not update the Has your taxpayer address changed as explained above If yes, you must enter your new address in the fields below Warning! Completing these fields will change your address Address Line: City:	Follow the rules provided to construct your Username and Password. Your Password is case sensitive. Write down your Username, Password, Recovery Question and PIN and keep them in a secure location – Never share your information with others or allow them to use your information.
State (USA Only): Zip Code:	Your password expires every 180 days. Your
Country:	PIN does not expire but it is a good idea to change it periodically.

Provide the Registration Information

Please select your preferred Username, Password and Personal Identification Number (PIN). (You must type password and PIN twice)		
Rules governing the creation of the Username, Password, and The most commonly encountered rules are identified below *Username (Required): *Password (Required): *Re-Enter Password (Required): *PIN (Required):	With e-Services Registration, you are able to change your official address of record with IRS. If you have moved since your last filing with IRS and have not notified us of the changes,	
*Re-Enter PIN (Required):	select "Yes" here and complete your new address. Note: Your confirmation code letter	
Please select one question to be answered by you if you f question and answer should be unlikely to be known by or currently live or the car you own today. *Question to Recover Username (Required): What is your motors.	should be forwarded by the Post Office to your	
*Answer (Required):	new address.	
The last address you provided the IRS on your individual tax return, Form 10 used to send you a registration confirmation number. You must provide us Upon confirmation of your registration, we will update your taxpayer home secondary taxpayer on a joint return, we will not update the address info under the primary SSN on the account Has your taxpayer address changed as explained above? Yes O No O If yes, you must enter your new address in the fields below. If no, proceed to terms and conditions.		
Warning! Completing these fields will change your address of record with the IRS.		
Address Line:		
City:		
State (USA Only):		
Country:	•	

Terms and Conditions

Terms and Conditions

Please read the following Privacy Act and conditions of use that explain why we are requesting the registration information, how it will be used, and your responsibilities as a registered user of e-services. After reading, please select the *Accept* button to continue your registration.

If you do not accept the presented Terms and Conditions, you will not be granted access to e-services.

The registration information you entered will then be deleted and you will be returned to the e-services welcome page.

Privacy Act Notice:

The Privacy Act of 1974 requires that when we ask individuals for information about themselves, we state our legal right to ask for the information, why we are asking for the information, and how it will be used. We must also tell you what could happen if we do not receive all or part of the information, and whether your response is voluntary, required to obtain a benefit, or mandatory.

Our legal right to ask for information is 5 U.S.C. 301 and the Internal Revenue Code Sections 6001, 6011, 6012 and applicable regulations. The registration information we are requesting is used to create an e-services account for you and authenticate your identity, in other words, to ensure you are who you say you are. The information may not be disclosed except as provided by Section 6103 of the Internal Revenue Code. We may give the information to the Department of Justice and to other Federal agencies, as provided by law. We may also give it to cities, states, the District of Columbia and U.S. commonwealths or possessions to carry out their tax laws. We may give it to foreign governments because of tax treaties they have with the United States. Your participation in the e-services program is voluntary. As such, your responses to any of the registration questions are entirely voluntary. However, if you do not provide all or part of the information required to create your account and authenticate your identity, you will not be eligible for access to e-services.

Paperwork Reduction Act Notice:

The collection of information contained in e-services has been reviewed and approved by the Office of Management and Budget in accordance with the Paperwork Reduction Act (44 U.S.C. 3507) under control number 1545-1823. An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless the collection of information displays a valid control number. Books or records relating to a collection of information must be retained as long as their contents may become material in the administration of any internal revenue law. Generally, tax returns and return information are confidential, as required by 26 U.S.C. §6103. The following table identifies the estimated length of time to complete the various e-services processes. This includes the time it will take to read the instructions, gather the necessary facts and enter the required information.

Read and understand the Terms and Conditions of Registration.

Submit Your Registration

to hear from you. You can write the Internal Revenue Service Tax Forms Committee, Western Area Distribution Center, Rancho Cordova, California 95743-0001.

Your Registration Obligations:

As an e-services user, you agree to provide true, accurate, current and complete information about yourself as prompted by the registration process and that you will maintain and promptly update this data to keep it true, accurate, current and complete. If you provide any information that is untrue, inaccurate, obsolete or incomplete, or there are reasonable grounds to suspect that such information is untrue, inaccurate, obsolete or incomplete, the IRS has the right to suspend or terminate your account and refuse any and all current or future use of e-services.

Member Account, Password and Security:

As part of the registration process, you selected a username, password and PIN. You are responsible for maintaining the confidentiality of this information. While it may be necessary to disclose your username or PIN to an IRS employee or other individual, you agree not to disclose your password to anyone. You are fully responsible for all activities that occur under your password. IRS personnel do not have access to your password and should never ask you for it.

You agree to immediately notify the IRS at 1-866-255-0654 (international callers use 512-416-7750) of any unauthorized use of your password or account, or any other breach of security and ensure that you exit from your account at the end of each session.

Limited Usage Agreement:

I agree that the IRS may deny me access to any or all electronic services, products and/or applications, at both the individual or business entity level, in the event IRS becomes aware of any activity that constitutes or appears to constitute misuse or abuse of any electronic services, products or applications.

If you do not accept the presented Terms and Conditions, you will not be granted access to e-services.

The registration information you entered will then be deleted and you will be returned to the e-services welcome page.

You may do either of the following:

- Select Accept to submit all your entries.
- Select Decline to discard all your entries.

Accept Decline Click "Accept" to submit your registration.

e-services Privacy Policy

Next Step

- For security and authentication, the next step will be to confirm your registration.
- Within 14 days, you will receive a letter containing a confirmation code from the IRS via U.S. Postal Mail. This will be sent to your official address of record.
- Confirmation code must be entered within 28 days of submitting e-Services registration or password will expire. You must then use the Forgotten password option to set a new password and a new confirmation code will be mailed.

How do I confirm my registration?

 Use the same link you used to register: www.irs.gov/eservices.

OR

- Follow the instructions in the e-Services Letter you received.
- You will need the Confirmation Code located in the upper right corner of the letter.

Welcome to e-services!

Thank you for your interest in IRS e-services.

You must complete the registration confirmation process within 28 days of this letter; otherwise, the confirmation code will expire and you will be required to create a new password by accessing the "Forgotten Password" link.

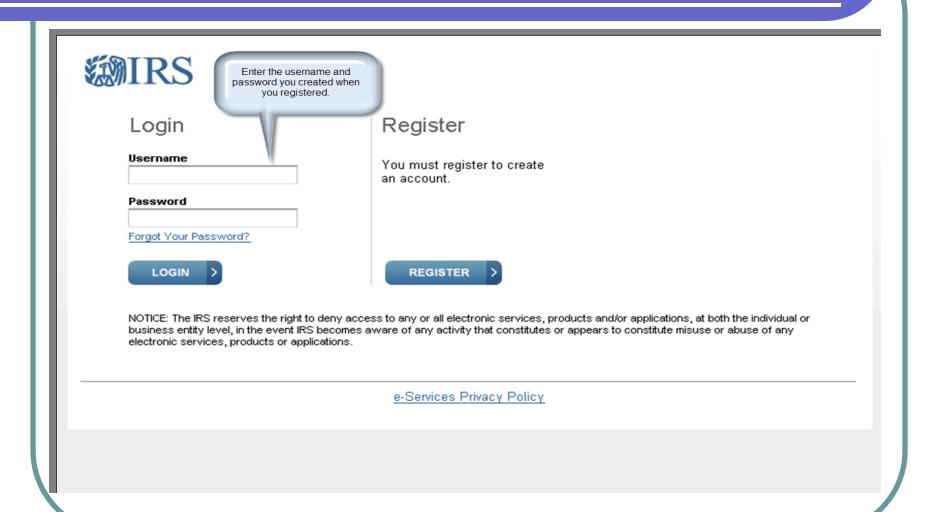
Follow the steps below to complete the registration process. You will need the username and password you created to confirm your registration.

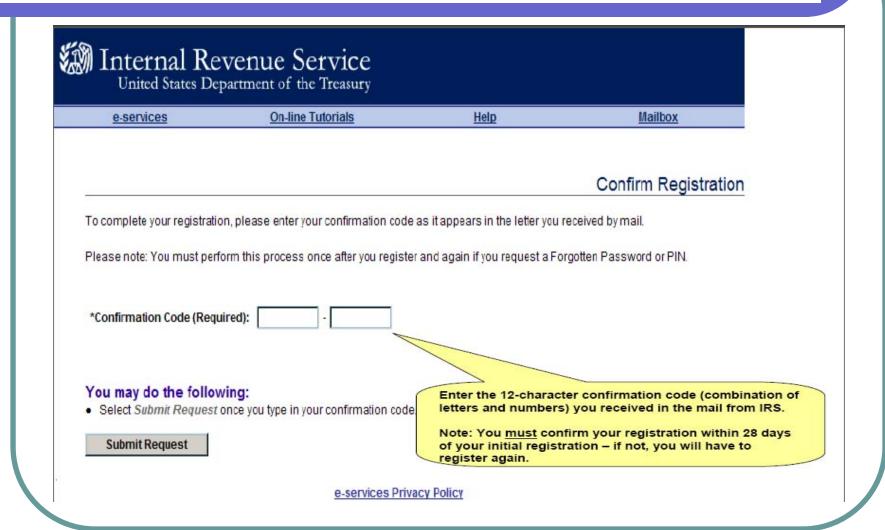
- Access www.irs.gov.
- 2. Select Tax Professionals Tab.
- 3. Select e-services for TaxPros.
- 4. Select Registration Services.
- 5. Select Confirm Registration.
- 6. Enter Username and Password.
- 7. Enter the Confirmation Code shown above.
- 8. Click Submit.

Follow the steps listed on your letter to confirm your registration.

For additional assistance, on-line tutorials are available when you select "Registration Services" in step four above. However, if you still need assistance after reviewing the on-line help information, please contact the e-help Desk at 1-866-255-0654 (1-512-416-7750 for international callers).



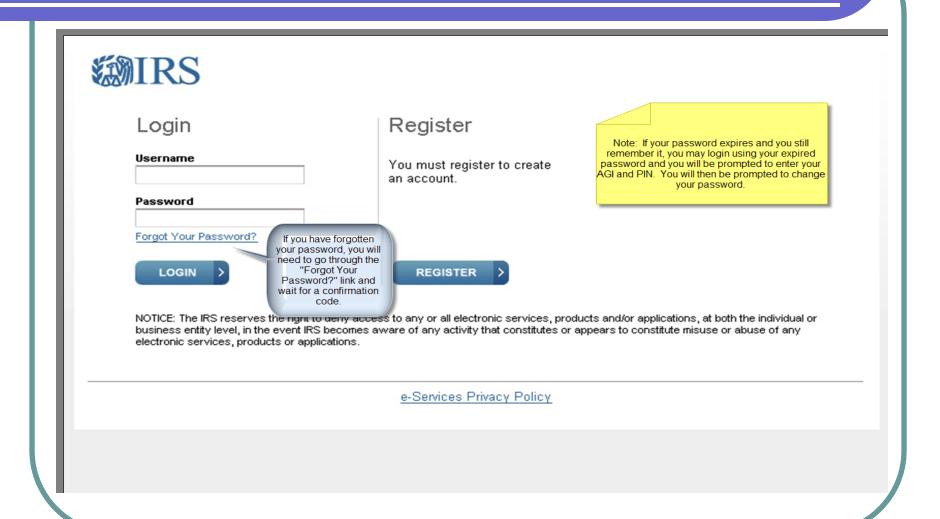




Secure your password

- For security reasons, e-Services passwords expire every 180 days.
- 15 days prior to expiration of your e-Services password, the system will advise you when you log in.
- 10 days prior to expiration of your e-Services password, the IRS will send you an email (if provided).
- Set your own reminder to log in to e-Services and change your password if you did not provide an email address during registration.

Forgot Your Password?



Registration Summary

- Registration is a one-time authentication of you as an individual that allows you to do business with IRS electronically.
- Confirm your registration within 28 days of the initial registration.
- Reset your password when prompted by the system when you log in or by an e-Services e-mail (or set a reminder if you don't have e-mail).
- Keep your Username, Password, Recovery Question and PIN in a secure location and do not share this information.

Do you have any questions?

The IRS e-Help Desk is available to answer any questions you may have on the e-Services Registration Process.

1-866-937-4130

Monday - Friday 6:30 am to 6:00 pm CST