

# 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](http://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

Login or Register

## 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



## Login

Username

Password

[Forgot Your Password?](#)

LOGIN



## Register

You must register to create an account.

REGISTER



Select "Register"

# Provide the Registration Information



Internal Revenue Service  
United States Department of the Treasury

[e-services](#)

[On-line Tutorials](#)

[Help](#)

[Mailbox](#)

## Registration

Please enter the following information to register for using e-services.  
For help, select the [Help](#) link and information will be provided in a "help" window.

**IMPORTANT:** Please print a copy for your records *before* you submit your entries for processing.

\*First Name (Required):

Middle Initial:

\*Last Name (Required):

Name Suffix:

\*Tax Identification Number (Required):

\*Date of Birth (Required):  (MM/DD/YYYY)

Phone:  (3 digit area code followed by 7 digit number, i.e. 8005551111)

Phone Country Code:  001 (Enter 001 for US)

Email Address:

Please provide your **Adjusted Gross Income (AGI)** from your most recent individual income tax return, Form 1040, 1040A, etc. Your AGI amount must agree with what was submitted on your original return prior to any amendment you may have made or any IRS adjustments. We suggest using your AGI from the prior year if your most recent return was filed within the last 4 to 6 weeks. If you filed last year's tax return after November 1, please use your AGI of the prior year tax return.

Choose one of the available tax years and enter your AGI.

\*Tax Year Ending Dec 31 (Required):

\*AGI (Required):  Whole dollars only



# 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 PIN have been created to further enhance the security of e-services. The most commonly encountered rules are identified below. [Select this link to see the full set of password and PIN rules.](#)

*Username (Required):	<input type="text"/>	<i>Username must be at least 8 characters long, may contain letters and numbers only, case insensitive (read as upper-case only).</i>
*Password (Required):	<input type="password"/>	<i>Password must be at least 8 characters long, must contain both letters and numbers, case sensitive, cannot be the same as the username.</i>
*Re-Enter Password (Required):	<input type="password"/>	
*PIN (Required):	<input type="text"/>	<i>PIN must be 5 digits only, cannot be all the same digits.</i>
*Re-Enter PIN (Required):	<input type="text"/>	

Please select one question to be answered by you if you forget your username and you attempt to re-register with IRS. The question and answer should be unlikely to be known by other individuals. For example, do not select your street where you currently live or the car you own today.

*Question to Recover Username (Required):	What is your mother's date of birth?
*Answer (Required):	<input type="text"/>

The last address you provided the IRS on your individual tax return was used to send you a registration confirmation number. You may update your address. Upon confirmation of your registration, we will update your address. If you are a secondary taxpayer on a joint return, we will not update the address.

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:	<input type="text"/>
City:	<input type="text"/>
State (USA Only):	<input type="text"/>
Zip Code:	<input type="text"/>
Country:	<input type="text"/>

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.

Your password expires every 180 days. Your 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 PIN have been created to further enhance the security of e-services.  
The most commonly encountered rules are identified below. [Select](#)

\*Username (Required):

\*Password (Required):

\*Re-Enter Password (Required):

\*PIN (Required):

\*Re-Enter PIN (Required):

Please select one question to be answered by you if you file a return. The question and answer should be unlikely to be known by others.  
currently live or the car you own today.

\*Question to Recover Username (Required):

\*Answer (Required):

The last address you provided the IRS on your individual tax return, Form 1040, will be used to send you a registration confirmation number. You must provide us with your current home address if it has since changed.  
Upon confirmation of your registration, we will update your taxpayer home address under your SSN only. If you last filed as a secondary taxpayer on a joint return, we will not update the address information under the primary SSN on the account.

Has your taxpayer address changed as explained above? Yes ☐ No ☒

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):

Zip Code:

Country:

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, select "Yes" here and complete your new address. Note: Your confirmation code letter will be sent to your **OLD** address of record and should be forwarded by the Post Office to your new address.

# 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](http://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.**



# Confirm Your Registration


## 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.

1. Access [www.irs.gov](http://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).

# Confirm Your Registration

The screenshot shows the IRS e-services website. At the top is the IRS logo and the text "Internal Revenue Service United States Department of the Treasury". Below this is a navigation bar with links for "e-services", "On-line Tutorials", "Help", and "Mailbox". On the right side of the page, there is a link for "Registration Services". On the left side, under the heading "services", there are several links: "Registration", "Confirm Registration", "Revise Registration", "Change Password/PIN", and "Expired, Forgotten or Lost Password or PIN". A yellow callout bubble points to the "Confirm Registration" link with the text "Click 'Confirm Registration'". Another yellow callout bubble points to the "Confirm Registration" link with the text "Welcome to Registration Services". Below the "Confirm Registration" link, there is a section titled "Registration" with a brief description of the registration process. A large yellow callout bubble contains detailed instructions for "Confirm Registration", "Revise Registration", "Change Password/PIN", and "Forgotten or Lost Password or PIN". At the bottom of the page, there is a small line of text: "Please have this information available before you continue on to the registration process. Thank you."

Internal Revenue Service  
United States Department of the Treasury

e-services On-line Tutorials Help Mailbox

Registration Services

services

- [Registration](#)
- [Confirm Registration](#)
- [Revise Registration](#)
- [Change Password/PIN](#)
- [Expired, Forgotten or Lost Password or PIN](#)

**Click "Confirm Registration"**

**Welcome to Registration Services**

**Registration**  
Here you can register to become a user of the Internal Revenue Service's (IRS) e-services web site. Our registration process involves collecting personal and taxpayer data for the sole purpose of authenticating your identity. The IRS will compare the information you provide with the information received from the Social Security Administration (SSA) and with the tax return information you previously filed.

**Confirm Registration:** Select this option to enter the confirmation code you received from the IRS. You should only have to complete this process once (if you ever forget your password or PIN, you will need to repeat this process).

**Revise Registration:** Selecting this option will allow you to revise the information in your Registration record, such as, name, telephone number, address, and e-mail address.

**Change Password/PIN:** Use this option to change your password, PIN or both.

**Forgotten or Lost Password or PIN:** Allows you to request a new confirmation code to reset your password if you've forgotten or lost your password. If your password has expired you may login through the Login link on the e-Services home page with the expired password and you will be prompted to change it once you've entered your AGI and PIN.

Please have this information available before you continue on to the registration process. Thank you.



# Confirm Your Registration



## Login

**Username**

**Password**

[Forgot Your Password?](#)

LOGIN



Enter the username and password you created when you registered.

## Register

You must register to create an account.


REGISTER



NOTICE: The IRS reserves the right to deny 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.

[e-Services Privacy Policy](#)

# Confirm Your Registration

 **Internal Revenue Service**  
United States Department of the Treasury

[e-services](#)   [On-line Tutorials](#)   [Help](#)   [Mailbox](#)

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Confirm Registration

To complete your registration, please enter your confirmation code as it appears in the letter you received by mail.

Please note: You must perform this process once after you register and again if you request a Forgotten Password or PIN.

\*Confirmation Code (Required):  -

**You may do the following:**

- Select *Submit Request* once you type in your confirmation code.

Submit Request

Enter the 12-character confirmation code (combination of letters and numbers) you received in the mail from IRS.

Note: You must confirm your registration within 28 days of your initial registration – if not, you will have to register again.

[e-services Privacy Policy](#)

# 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?

**IRS**

**Login**

**Username**

**Password**

[Forgot Your Password?](#)

**LOGIN >**

**Register**

You must register to create an account.

**REGISTER >**

Note: If your password expires and you still remember it, you may login using your expired password and you will be prompted to enter your AGI and PIN. You will then be prompted to change your password.

If you have forgotten your password, you will need to go through the "Forgot Your Password?" link and wait for a confirmation code.

NOTICE: The IRS reserves the right to deny 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.

[e-Services Privacy Policy](#)

# 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