

# IRS e-file Application Process

For Form 8947 and  
Form 8963 ONLY

# Why do I have to create an IRS e-file Application?

- Provides authorization to e-file your corporation's return electronically.
- Assignment of an Electronic Filing Identification Number (EFIN) and an Electronic Transmitter Identification Number (ETIN).
- Establishes the form type (8963 / 8947) you will file with IRS.

# How do I get started?

- All Responsible Official(s) and Delegated User(s) within your corporation who will be responsible for e-filing your ACA related and/or creating or maintaining your corporate IRS e-file Application will need to ***individually register with e-Services.***
- Registration is a one-time, universal process that authenticates you and allows you to do business electronically with IRS.
- Once you have successfully registered and confirmed you are ready to begin the e-file application process for your corporation.

# 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)**”.

# What do I need to create my e-file application

You must determine who will perform certain functions for your corporation and gather the necessary information to complete your e-file application.

You will need to decide:

- Who will be your Responsible Official(s) (you can have up to five; recommend two for back-up purposes).

You will need:

- Each individual to be registered and confirmed for e-Services.
- The organization's Employer Identification Number (EIN).
- Each individual(s) Social Security Number and Date of Birth.

# What is a Responsible Official?

## **A Responsible Official is:**

- An individual with responsibility for and authority over your e-file operation.
- An individual who is the first point of contact with the IRS and has the authority to create, revise and sign your IRS e-file application.
- An individual who is responsible for ensuring that your corporation adheres to the provisions of all publications and notices governing IRS e-file. If one individual cannot fulfill these responsibilities, up to four additional Responsible Officials may be identified. It is a good idea to identify at least two persons to act as back-up for each other.
- An individual who is a U.S. citizen or legal resident alien (lawful permanent resident) and has attained the age of 18 as of the date of the application.

## **Note: The Responsible Official is not required to be a Principal or Corporate Officer.**

You will need the following information for each Responsible Official you want to add to your corporation's IRS e-file application: Name, Position Title, U.S. Citizen Status, Social Security Number, Date of Birth and E-mail Address.

# Where do I go to complete the e-file Application?

- **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"

# Login



## Login

Username

Password

[Forgot Your Password?](#)

LOGIN >

Enter the Username and Password you created when you registered with e-Services

Then Select Login

## Register

You must register to create an account.

REGISTER >

# Go to Application

The screenshot shows the IRS e-services website. At the top, there is a dark blue header with 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", "Mailbox", "Sign out", and "Contact Us". On the left side, there is a sidebar with the heading "services" and four links: "Application", "Reporting Agent e-Services", "Transcript Delivery System", and "Registration Services". The "Application" link is highlighted in a yellow callout box with the text "Select 'Application' from the center screen". The main content area features a large image of the American flag on the left and a welcome message "Welcome to IRS e-services" on the right. Below the welcome message, there are two input fields: "NAME Representing" and "INSURANCE COMPANY". Below these fields, there are four sections of text, each starting with a link: "Application", "Reporting Agent e-Services", "Transcript Delivery System", and "Registration Services".

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services

[Application](#)

[Reporting Agent e-Services](#)

[Transcript Delivery System](#)

[Registration Services](#)

Welcome to IRS e-services

NAME Representing INSURANCE COMPANY

[Application](#)  
Access to apply or revise an existing application on-line for participation in IRS e-file Program or Taxpayer Identification Number (TIN) Matching.

[Reporting Agent e-Services](#)  
Provides access to Transcript Delivery System and Electronic Account Resolution.

[Transcript Delivery System](#)  
Transcript Delivery System (TDS) provides self-service for return and account information requests by external customers through e-services portal. TDS automates the validation, processing, and delivery of taxpayer information to the authorized third party user, thus requiring less intervention from IRS personnel.

[Registration Services](#)  
Registration Services allows you to confirm your registration, revise your registration information, change your password or PIN and recover a lost password or PIN.

# e-Services Applications Available



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## services

### [Application](#)

[Reporting Agent e-Services](#)

[Transcript Delivery System](#)

Select "e-File Application" from the center screen

### [e-File Application](#)

The Application to participate in the IRS *e-file* Program can be submitted on-line. The IRS will review your application information and supply a written confirmation as to your acceptance or rejection into the program. You may use this either to create a new Application or to revise an existing one.

### [ACA Application for TCC](#)

The application to participate in IRS Affordable Care Act electronic filing of information returns is available on-line. The IRS will review the information submitted on your application and send an acceptance or rejection letter. You may use this link to create a new application or to revise an existing one.

### [New TIN Matching Application](#)

Payers may apply for Taxpayer Identification Number (TIN) Matching, an on-line product which allows you to submit TIN/Name combinations for verification against IRS records.

# New Application

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List of Applications

Firm Type

## e-file Application

You may select an existing application to revise or complete from the list below. You can begin a new application by clicking on [New Application](#).

[New Application](#)

[Best Services- Test, 310 LOWELL STREET, ANDOVER, MA 01810 <Completed>](#)

[Build Testing, 5000 ELLIN RD, LANHAM, MD 21086 <Completed>](#)

[Company for Testing Again, 310 Lowell St Andover, MA 01810 <Completed>](#)

Select a location to revise an existing Application

Select "New Application".

# Firm/Organization Business Type

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[List of Applications](#)

**Firm Type**

## e-file Application: Firm/Organization Business Type

Thank you for visiting our new on-line e-file application site where you will be able to complete a new "Apply for e-file Program". This is the Form 8633 on-line application process. The application process will ask you for Firm/Organization and personal information including Social Security Number, Date of Birth, U.S. Citizenship regard to each of the Principals and Responsible Officials you will be adding to your application. You will also provide the Social Security Number of all Delegated Users. The IRS will compare the information in the "Required Fields" with the Social Security Administration and the tax return information you previously filed.

You will have the opportunity to save your application, if you do not have all the information required, and you can revise the application with your information. Once you have input all the required information, you will be able to submit your application for review by the Internal Revenue Service (IRS). The IRS will process your application and send you a confirmation.

The time it takes to fill out the application can vary by organization and will usually take between 20-30 minutes.

\*Business Type (Required):

\*Does your firm have an Employer Identification Number (EIN)? (Required)

**When you have finished Firm/Organization Business Type, you may:**

- Select **Next** to go to the Corporation page.
- Select **Cancel** to exit the application.

[e-services Privacy Policy](#)

**Selection of "Corporation" will automatically default to an EIN required. Click "Next"**

# Your Role within the Organization

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If, for the purpose of IRS e-file, you or your firm use a "Doing Business As" (DBA) name(s) other than your firm's legal name, include the DBA name

Please select the appropriate role as a Principal or a Responsible Official for this firm/organization.

\*Firm/Organization Role(Required):

\*Firm/Organization Legal Name (Required):

**Doing Business As (DBA) (if other than Legal Name):**

\*Employer Identification Number(EIN)(Required):

**When you have finished Corporation, you may:**

- Select *Previous* to go back to the Firm/Organization Business Type page.
- Select *Next* to go to Firm/Organization Address.
- Select *Cancel* to exit the application.

    

Select  
"Responsible  
Official" from  
the drop down  
menu (NOT  
PRINCIPAL).

# Principal or Responsible Official?



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If your firm is a sole proprietorship, enter the name of the sole proprietor. If your firm is a partnership or corporation, enter the name shown on the firm's tax return.

If, for the purpose of IRS e-file, you or your firm use a "Doing Business As" (DBA) name, include the DBA name

Please select the appropriate role as a Principal or a Responsible Official for this firm

\*Firm/Organization Role(Required):

\*Firm/Organization Legal Name (Required):

Doing Business As (DBA) (if other than Legal Name):

\*Employer Identification Number(EIN)(Required):

### When you have finished Corporation, you may:

- Select *Previous* to go back to the Firm/Organization Business T
- Select *Next* to go to Firm/Organization Address.
- Select *Cancel* to exit the application.

### Message from webpage



You must be a Principal to select 'For Profit' e-file business activities on a new application. (25000,163)

The system will allow Responsible Officials to only apply for 'Not For Profit' e-file business activities e.g. Volunteer Income Tax Assistance VITA, Tax Counseling for the Elderly TCE, Military Base, Tax Assistance Center (TAC) or Employee/Member Benefit on a new application.

**This message box is for third party e-file providers. As a covered entity, you are filing as a "Not for Profit" e-file business. Select "OK" to continue.**

# Legal Name Required

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**e-file Application: Corporation**

If your firm is a partnership or a corporation, provide the firm's Employer Identification Number (EIN). If your Firm is a sole proprietorship, with employees, provide the business Employer Identification Number (EIN) . If you do not have employees, provide the Social Security Number (SSN).

If your firm is a sole proprietorship, enter the name of the sole proprietor. If your firm is a partnership or corporation, enter the name shown on the firm's tax return.

If, for the purpose of IRS e-file, you or your firm use a "Doing Business As" (DBA) name(s) other than your firm's legal name, include the DBA name

Please select the appropriate role as a Principal or a Responsible Official for this firm/organization.

\*Firm/Organization Role(Required):

\*Firm/Organization Legal Name (Required):

Doing Business As (DBA) (if other than Legal Name):

\*Employer Identification Number(EIN)(Required):

**When you have finished Corporation, you may:**

- Select *Previous* to go back to the Firm/Organization Business Type page.
- Select *Next* to go to Firm/Organization Address.
- Select *Cancel* to exit the application.

      

**Input your "legal Name", "Doing Business As" (if different from Legal Name) and EIN.**

**Select "Next."**

# What if my Corporation and Legal Name do not match IRS records?



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sole proprietorship, with employees, provide the business Employer Identification Number (EIN) . If you do not have employees, provide the Social Security Number (SSN).

If your firm is a sole proprietorship, enter the name of the sole proprietor. If your firm is a partnership or corporation, enter the name shown on the firm's tax return.

If, for the purpose of IRS e-file, you or your firm use a "Doing Business As" (DBA) name(s) other than your firm's legal name, include the DBA name

Please select the appropriate role as a Principal or a Responsible Official for this firm/organization.

\*Firm/Organization Role(Required):

\*Firm/Organization Legal Name

Doing Business As (DBA) (if other than legal name)

\*Employer Identification Number(Required)

### When you have finished Corporation, you

- Select *Previous* to go back to the Firm/Organization Business Type page.
- Select *Next* to go to Firm/Organization Address.
- Select *Cancel* to exit the application.

Previous

Next

Cancel

**If you receive this message box, your Corporation's Legal Name and EIN do not match IRS records. Call the e-Help Desk at 1-866-255-0654 for verification.**

Message from webpage



Please check the accuracy of the information you have entered. (25000,135)  
The information you have entered does not match current IRS records. Please try your request again.

OK

# Firm/Organization Address

**Physical Address (Required)**

\*Country(Required):

\*Address 1 (Required):

Address 2:

Address 3:

\*City (Required):

\*State (Required):  State Ab

\*Postal (Required):

**Business Phone & Fax Number**

\*Country Code (Required):

\*Telephone (Required):

Fax Country Code:

Fax Number:

Is your mailing address different than your physical address?

Yes  No

If yes, provide a mailing address.

Is your firm/organization open 12 months of the year?  Yes  No

If no, provide a year-round address and telephone number.

**When you have finished Firm/Organization Address, you may**

# Responsible Official

\*First Name (Required):

Middle Initial:

\*Last Name (Required):

Name Suffix:

\*Position Title (Required):

\*U.S. Citizen (Required):

\*Social Security Number (Required):

\*Date of Birth (Required):

Email Address:

Is this person also a primary contact?  No  Yes

- Select *Add* to add a responsible official.
- Select *Clear* to clear the form.

Complete the fields to designate your Responsible Official(s). Your Responsible Official does not have to be a Principal or Corporate Officer.

Select "Add" to create a table.

You can have up to five Responsible Officials. It is suggested to have at least two to serve as a back up.

Select "Next"

# Application Contacts

Please enter a Primary Contact who will be available on a daily basis to answer IRS questions regarding this application and any processing issues throughout the year. A Primary Contact is required for all applications. You may also enter an Alternate Contact who the IRS may talk to if the Primary Contact is unavailable.

**Primary Contact (Required)**

\*First Name (Required):   
Middle Initial:   
\*Last Name (Required):   
Name Suffix:    
Salutation:    
Title:   
\*Country Code (Required):   
\*Phone Number (Required):   
Fax Country Code:   
Fax Number:   
Email Address:

**Alternate Contact**

\*First Name (Required):   
Middle Initial:   
\*Last Name (Required):   
Name Suffix:    
Salutation:    
Title:   
\*Country Code (Required):   
\*Phone Number (Required):   
Fax Country Code:   
Fax Number:   
Email Address:

- Select *Add* to add an alternate contact.
- Select *Clear* to clear the form.

Enter the Primary Contact information. This individual would answer questions regarding your e-file Application and any e-file processing issues you may encounter during the year. Your application contact can also be the designated Responsible Official.

To add an Alternate Contact, select the arrow adjacent, complete the information and select "Add". This will create a table allowing multiple entries. Select "Next"

# Program(s) Applying For



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## e-file Application - Program(s) Applying For

Name: ROUGH AND TOUGH HILL CLIMBERS

You are required to declare all the business activities that will be performed with this application. You must select all the business activities by making appropriate entries and selections below. You may use the **Add** button as needed.

### Business Activity

\*Provider Option (Required): Affordable Care Act Provider [View Provider Options Definition](#)

\*For Profit or Not For Profit Business Activity (Required): Covered Entity

Type of Business Activity: Insurance Provider

- Select **Add** to add a provider option.
- Select **Clear** to clear the form.

Add

Clear

Select "Add"

Select "Affordable Care Act Provider" from the drop down menu. Business Activity will default to "Covered Entity".

Select "Insurance Provider" or "Pharmaceutical Company" as applicable

Do you want your firm/organization's contact information posted on the irs.gov public website? Yes  No

# What is a ACA Provider?

- **ACA Provider** – An ACA Provider is a business or entity engaged in manufacturing or importing branded prescription drugs sold to specified government programs ("covered entity") or a health insurance provider reporting net premiums written ("covered entity") that originates the electronic submission of its own information report(s), or a third party that will transmit report(s) on behalf of a covered entity.

# For Filers of ACA Information “Returns”

- **Note: The ACA Provider role is not for filers of ACA Information “returns.” Filers of the following ACA Information “returns” must apply for an ACA Transmitter Control Code (TCC) not a Provider role in efile - search “AIR” in irs.gov for more information:**

- Form 1094-B, *Transmittal of Health Coverage Information Returns*
- Form 1095-B, *Health Coverage*
- Form 1094-C, *Transmittal of Employer-Provided Health Insurance Offer and Coverage Information Returns*
- Form 1095-C, *Employer-Provided Health Insurance Offer and Coverage*

# Review Information Shown

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**e-file Application : Program(s) Applying For**

Name: ROUGH AND TOUGH HILL CLIMBERS    Employer Identification Number(EIN): 53-0000153

You are required to declare all the business activities that will be performed with *electronic filing*. Please use this page to declare all the business activities by making appropriate entries and selections below. You may declare multiple business activities by selecting the **Add** button as needed.

**You can select any of the following actions from the table below:**

- Select **Edit** to edit provider option entries. (The editable entries will appear in the section below.)
- Select **Delete** to delete a provider option.

Provider Option	For Profit	Business Activity	Status	Edit	Delete
Affordable Care Act Provider	Covered Entity	Insurance Provider	Applied	<a href="#">Edit</a>	<a href="#">Delete</a>

**Business Activity**

\*Provider Option:  No Care Act Provider    [View Provider Options Definition](#)

\*For Profit or Not For Profit:

- Select **Add** to add a provider option.
- Select **Clear** to clear the provider options.

  

Do you want your firm/organization to be a **covered entity**?  Yes  No

e-file application Menu Page

**When you have finished:**

- Select **Previous** to go back to the e-file application menu page.
- Select **Next** to go to the Form(s) page.
- Select **Save** to save all changes made.
- Select **Cancel** to exit the application.

          

The Provider Option table shows "Affordable Care Act Provider", "Covered Entity" and "Insurance Provider".

Select "Next"

# Application Form(s)

## e-file Application : Form(s)

Name: ROUGH AND TOUGH HILL CLIMBERS

Employer Identification Number(EIN): 53-0000153

You are required to select the return/form type you are planning to e-file.  
You must select at least one form type for each provider type.

\*Provider Option (Required): Affordable Care Act Provider

\*For Profit (Required): Covered Entity

\*Return/Form Type (Required)

8963 - Insurance Provider Fee

- Select *Add* to add an e-file form.
- Select *Clear* to clear the form.

Add

Clear

Select "Add"

Return/Form Type will default to:  
"8963 – Insurance Provider Fee"  
or  
"8947 – Branded Prescription Drug Fee"  
depending on the business activity.

# Responsible Official Authorities

## Responsible Official Authorities

You may delegate authorities to individuals, however, by delegating these responsibilities you will still be responsible for this person's actions and activities.

Please select one or more of the following...

- View Application Information
- Update Application Information
- Sign & Submit Revised Applications
- 
- Add, Delete & Change Responsible Officials

**All authorities will default to the Responsible Official. You must deselect any authority you do not want assigned to a Responsible Official.**

**When you have finished your editing, you may:**

- Select *OK* to apply all changes and return to Responsible Official(s).
- Select *Cancel* to discard all changes and return to the Responsible Official(s) page.

OK

Cancel

# What is a Delegated User?

- A Delegated User is an individual within your organization, other than a Responsible Official. This user is an employee, partner or other member of the organization. This user may also be someone who has a business relationship with the organization and whom you want to perform activities for your organization.
- You will need the following information for each Delegated User you want to add to your corporation's IRS e-file Application: Name, Social Security Number, Title and E-mail Address.

# Delegated User(s)

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**e-file Application : Delegated User(s)**

Name: DH ND AnotherHenry   Employer Identification Number(EIN):

You may add users to your application that you wish to delegate authorities to. Delegated users are not required to submit the application.

\*First Name (Required):   
Middle Initial:   
\*Last Name (Required):   
Name Suffix:   
Title:   
\*Social Security Number (Required):   
Email Address:

• Select **Add** to add a delegate.  
• Select **Clear** to clear the form.

 

 

**When you have finished Delegated User(s), you may do any of the following:**

- Select **Previous** to go back to the Form(s) Page.
- Select **Next** to go to the Application Summary page.
- Select **Save** to save all changes made.
- Select **Cancel** to edit the application.

       

As with the Responsible Official screens, complete the information, click "Add" and a table will be created with a list of your Delegated User(s).

# Delegated Authorities

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You may add users to your application that you wish to delegate authorities to. Delegated users are not required to submit the application.

**You can select any of the following actions from the table below:**

- Select [Authorities](#) to go to Delegate authorities page.
- Select [Edit](#) to edit delegated user entries. (The editable entries will appear in the section below.)
- Select [Delete](#) to delete a delegated user.

Name	TIN	Organization Role	Principal Consent	Title	Delegate Authorities	Edit
SMITH,TWEETY A	XXX-XX-0004	Delegated User	No		<a href="#">Delegated Authorities</a>	<a href="#">Edit</a>

**\*First Name (Required):**  
Middle Initial:  
**\*Last Name (Required):**  
Name Suffix:  
Title:  
**\*Social Security Number (Required):**  
Email Address:  
Is this person also a principal consent?    No    Yes

• Select [Add](#) to add a delegate.  
• Select [Clear](#) to clear the form.

 

[e-file application Menu Page](#)   [Add Comment\(s\)](#)   [Go to Summary Page](#)

**When you have finished Delegated User(s), you may:**

- Select [Previous](#) to go back to the e-file application Menu page.
- Select [Next](#) to go to Application Status.
- Select [Cancel](#) to exit the application.

    

**As with the Responsible Official screens, select "Delegated Authorities" for each of your Delegated Users to identify their permissions.**

# Permissions



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## Delegate Authorities

You may delegate authorities to individuals, however, by delegating these responsibilities you will still be responsible for this person's actions and activities.

**SMITH, TWEETY B**

Please select one or more of the following...

- Principal Consent
- View Application Information
- Update Application Information
- Sign & Submit Revised Applications
- Add, Delete & Change Principals
- Add, Delete & Change Responsible Officials

**When you have finished your editing, you may:**

- Select *OK* to apply all changes and return to Responsible Official(s).
- Select *Cancel* to discard all changes and return to the Responsible Official(s) page.

OK

Cancel

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**Unlike Responsible Officials, Delegated Users are not automatically assigned all permissions. You must click on the box for any authority you want to assign your Delegated User.**

**Click "OK" when finished.**

# Application Status

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**e-file Application : Application Status**

Name:       Employer Identification Number(EIN):

<u>Recin Date/Time</u>	<u>Application Status</u>
10/16/2006 1:58:43PM	Completed
10/16/2006 1:58:24PM	Submitted New
09/20/2006 12:42:07PM	Submitted Pending Document
06/07/2006 9:32:26AM	Saved

[e-file application Menu Page](#)   [Add Comment\(s\)](#)   [Go to Summary Page](#)

**When you have finished Application Status, you may do any of the following:**

- Select *Previous* to go back to the e-file application Menu Page.
- Select *Next* to go to the Service(s) Authorized For page.
- Select *Save* to save all changes made.
- Select *Cancel* to exit the application.

[Previous](#)   [Next](#)   [Save](#)   [Cancel](#)

**Application Status shows activity on your IRS e-file Application with the time and date of that activity.**

# Maintaining your e-file Application



It is important that Responsible Officials and/or Delegated Users update or delete their roles and authorities on the IRS *e-file* Application when they are no longer associated with the firm and its EFIN or their position in the firm no longer warrants the assigned authorities.

# Application Submission

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understand that noncompliance will result in the firms and/or the individuals listed on this application, being suspended from participation in the IRS e-file program. I am authorized to make and sign this statement on behalf of the firm.

Please enter your PIN to accept the terms for this application. Your PIN is your electronic signature PIN, which was selected when you registered.

\*PIN (Required):

    

**When you have finished Application Submission, you can:**

- Select *Previous* to go back to the e-file application Menu page.
- Select *Submit* to this application.
- Select *Cancel* to exit the application.

    

**Note: You cannot advance to the next screen if you leave any required fields blank. A message will be displayed. Select "OK" and complete.**

**Enter the individual "PIN"**

**Select "Submit"**

None of the following field(s) can be blank:  
\*PIN (Required) (25000,35)

# Submission Complete

The screenshot shows the IRS e-file application submission complete screen. At the top, the IRS logo and "Internal Revenue Service United States Department of the Treasury" are displayed. Below this is a navigation bar with links for "e-services", "On-line Tutorials", "Help", "Mailbox", and "Sign out". The main heading is "e-file Application : Submission Complete".

Fields for "Name:" and "Social Security Number(S)" are visible. The main text reads: "Thank you for submitting your e-file application to the IRS. If a Principal/Responsible Official listed on the e-file application is required to submit Fingerprint Card(s) or Proof of Professional Status, then they must forward this information to the following address within thirty (30) days of the submission of this application:"

The address provided is: "Andover Submission Processing Center, 310 Lowell Street Stop 983, Andover MA, 01812".

Instructions state: "Please include the tracking number below with your Fingerprint Card(s) and/or Proof of Professional status. This information must be received in order for your e-file application to be processed." and "For additional information regarding Fingerprint Cards or Proof of Professional Status, please click this link: [To Be an Authorized IRS e-file Provider](#)."

A callout box points to the tracking number, stating: "Record your 20-digit tracking number. If you have any questions about your IRS e-file Application and need to call the e-Help Desk (1-866-255-0654), you will need to provide this number to obtain assistance. They can research your Application using this tracking number."

The tracking number is: **Tracking Number 20040427093828315**

An "OK" button is located at the bottom of the page.

# Processing of Your e-file Application

- The IRS will validate your IRS e-file application. This may take several days to complete.
- You will not be able to change/modify your IRS e-file application until this validation process is completed.
- After completing the validation process, the IRS will assign you an EFIN and ETIN.
- The IRS will mail an acceptance letter welcoming you to the e-file program which will contain your EFIN and ETIN and be sent to the mailing address you provided when you created your e-file application.

# What about changes to my e-file application?

- If there are any changes that would affect your corporation's IRS e-file application, it must be revised online within thirty days. This is important for several reasons. If the IRS does not have current addresses, any communication from the IRS (letters, publications, or other materials) may not be received. If any of these items are returned to the IRS indicating that the address has changed, you will be temporarily removed from participation in IRS e-file. **This means that all returns submitted after that time will be rejected until the address information is updated.**
- The same is true for telephone numbers. If the IRS tries to call a number that has changed or has been disconnected, you will be temporarily removed from participation in IRS e-file until new telephone numbers are provided. Keep in mind that changes submitted on an IRS e-file application will not change the address of record for the tax records nor will a change to tax records automatically update information associated with your EFIN.

# Revising Your e-file Application

The screenshot shows the 'Select Organization' page from the Internal Revenue Service. The page header includes the IRS logo and the text 'Internal Revenue Service United States Department of the Treasury'. Below the header, the title 'Select Organization' is displayed. The main content area contains instructions: 'Select the organization you will represent in this session.' and 'Each item below represents an organization for which you are authorized to perform work. By selecting an organization, you are logging in as an authorized user of that organization. You will be able to perform work for only that organization.' A list of organizations follows, each with a radio button and a name: Individual (selected), D & J ACCESSORY, SDH TEST MATCH ONDRA, 4557 CIRCUS TOWN, ST CHARLES, IL, 60175, Dick Holden, Sub #11, SUITE #11, ANY, UT, 84401, ANTHEA TEST, anthea test 4, 319 IRWIN ST, LINCOLN, NE, 68504, Anthea test, 7878 IRWIN ST, FAIRFAC, VA, 71245, Anthea 998, 3934 MAIN ST, FAIRFAX, VA, 29435, and IRSH, 123 ANY, ANY, UT, 84401. A 'Submit Selected Organization' button is located below the list. At the bottom of the page, there is a link for 'e-Service Provider Portal'. A yellow callout box on the right side of the page contains the text: 'Once you are associated with an IRS e-file Application, you will select that organization to view/modify your corporation's Application.'

# IRS e-file Application Menu

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

e-services    On-line Tutorials    Help    Mailbox    Sign out    Contact Us

**e-file Application**

Name: OH NO Another Henry    Employer Identification Number(EIN): 57-0001767

You are about to revise the application for your Firm/Organization. If your application has been submitted and been accepted by the IRS you may have to re-submit your application for review based on your revisions. Not all changes will require you to re-submit the application for review.

Select the area of the application you want to enter, revise or view information about:

- [Firm Name & Business Type](#)
- [Firm/Organization Address](#)
- [Responsible Official\(s\)](#)
- [Application Contact\(s\)](#)
- [Program\(s\) Applying For](#)
- [Eom\(s\)](#)
- [EFIN Status](#)
- [Delegated User\(s\)](#)
- [Application Status](#)
- [Application Summary](#)
- [Personal Information](#)
- [Application Comments](#)
- [Application Submission](#)

**When you have finished, you may do any of the following:**

- Select **Cancel** to exit the application.
- Select **Return to Search** to return to Search e-file Application.

  

**This Menu allows you to go directly to various areas of your IRS e-file Application.**

**Click on any of the links to view/modify that area of your Application**

# Navigating the Screens

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

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

\*First Name (Required):   
Middle Initial:   
\*Last Name (Required):   
Name Suffix:   
\*Position Title (Required):   
\*U.S. Citizen (Required):   
\*Social Security Number (Required):   
\*Date of Birth (Required):   
Email Address:

Is this person also a primary contact?  No    Yes

- Select **Add** to add a responsible official.
- Select **Clear** to clear the form.

 

    

**When you have finished Responsible Official(s), you may do any of the following:**

- Select **Previous** to go back to the e-file application Menu Page.
- Select **Next** to go to the Application Center(s) page.
- Select **Save** to save all changes made.
- Select **Cancel** to exit the application.

       

**This link is available on every screen to navigate back to the main Menu Page.**

# ETIN Status

Internal Revenue Service  
United States Department of the Treasury

e-services [Sign out](#) [Contact Us](#)

**e-file Application : ETIN Status**

Name: AMTRAK CORP Employer Identification Number(EIN): 57-0300083

**Electronic Transmitter Identification Number**

	<a href="#">For Profit</a>	<a href="#">Provider Option</a>	<a href="#">ETIN</a>	<a href="#">ETIN Type</a>	<a href="#">Status</a>	<a href="#">Begin Date/Time</a>	<a href="#">EMS Login ID</a>
1	Covered Entity	ACA Provider	11362	Production	Active	05/20/2010 10:30:16AM	SEDHY6NM

[e-file application Menu Page](#) [Add Comment\(s\)](#) [Go to Summary Page](#)

**When you have finished ETIN Status, you may do any of the following:**

- Select **Previous** to go back to the Online Provider Software Info Page.
- Select **Next** to go to the EFIN Status page.
- Select **Save** to save all changes made.
- Select **Cancel** to exit the application.

[Previous](#) [Next](#) [Save](#) [Cancel](#)

# EFIN Status

Internal Revenue Service  
United States Department of the Treasury

e-services    On-line Tutorials    Help    Mailbox    Sign out

### e-file Application : EFIN Status

Name: New Out #3      Social Security Number (SSN): 100-100-1001

Listed below are the EFIN(s) Electronic Filing Identification Number(s) and their statuses that have been assigned to this application.

EFIN	EFIN Status	Expire Date/Time	
1 872709	Valid/Active	11/07/2008 11:29:43PM	[+]

**Electronic Return Originator (ERO) Activity by EFIN/Return**  
The activity shown below by EFIN and Return Type represents the total YTD counts for those who have electronically filed to the IRS.

[e-file application Main Page](#)   [Add Comments](#)   [Go to Summary Page](#)

**When you have finished EFIN Status, you may do any of the following:**

- Select **Previous** to go back to the e-file application Main Page.
- Select **Next** to go to the Firm Suitability Information page.
- Select **Save** to save all changes made.
- Select **Cancel** to edit the application.

[Previous](#)   [Next](#)   [Save](#)   [Cancel](#)

**This table will contain your 6-digit EFIN. An EFIN is required in order for you to e-file your corporation's return with the IRS.**

# e-Help Desk

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

**1-866-937-4130**

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