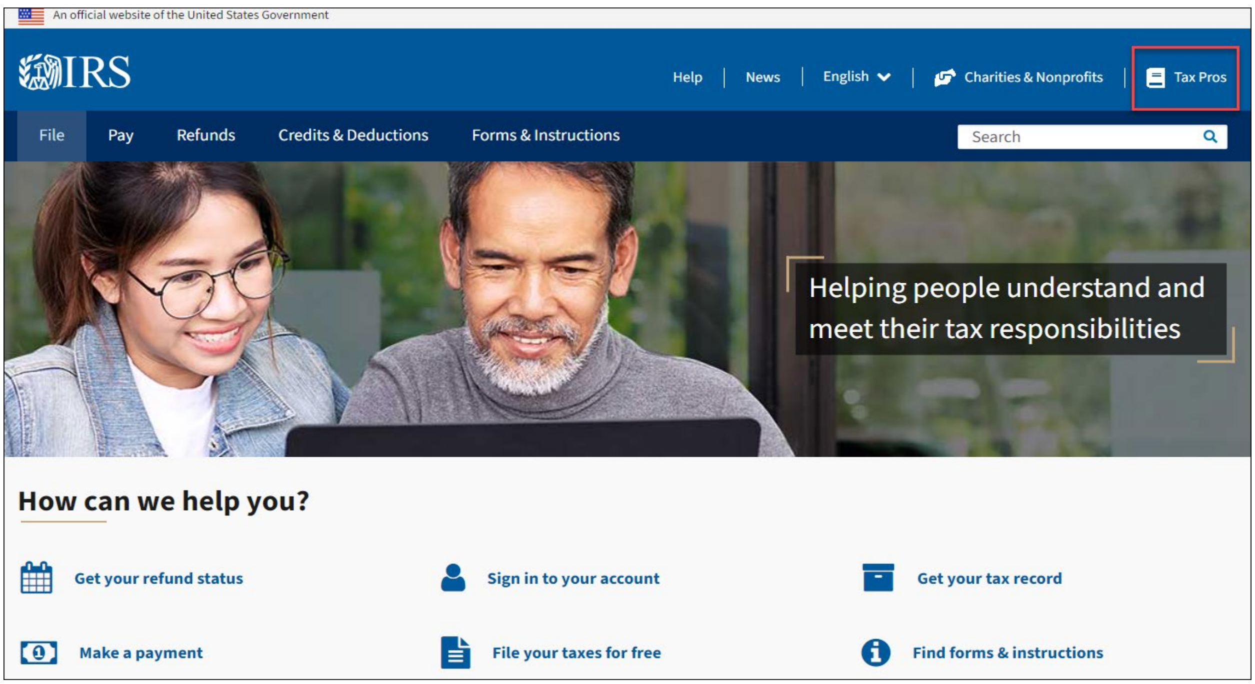
Obtaining an EFIN when the Authorized Representative of the Provider has an Individual Taxpayer Identification Number (ITIN)

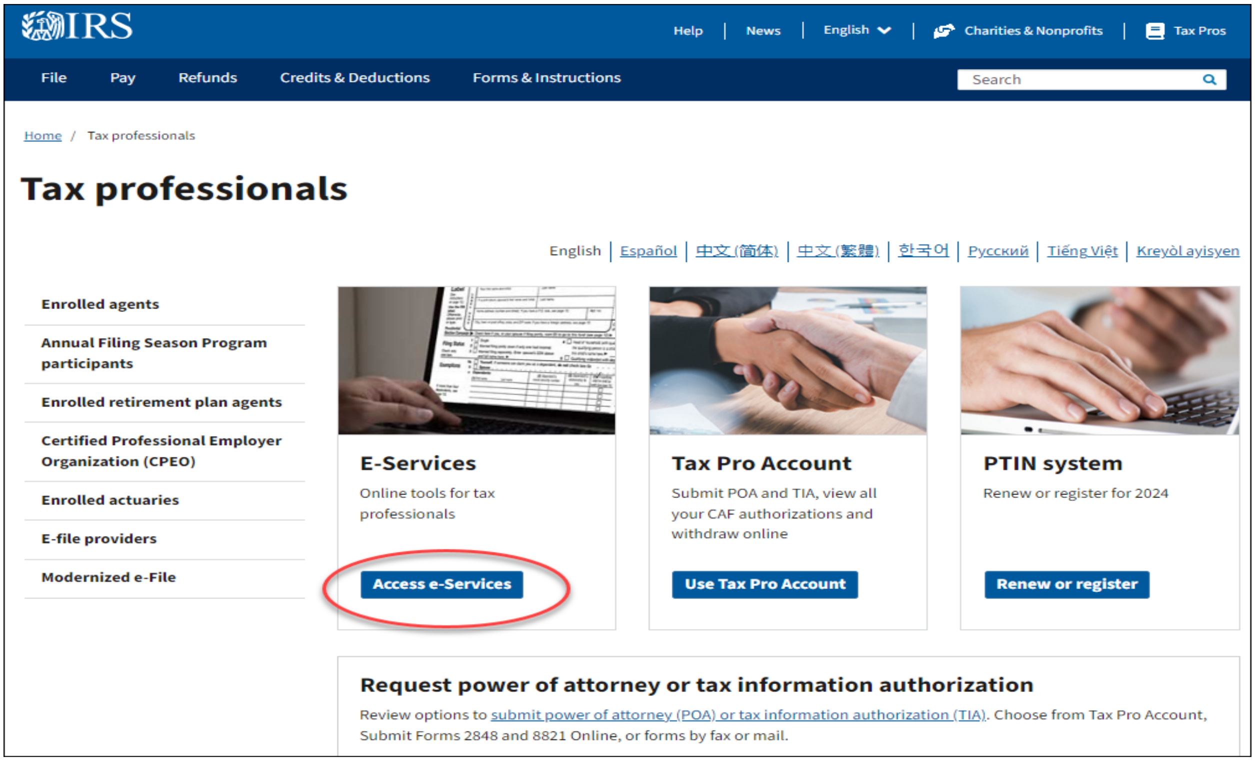
Providers may obtain an Electronic Filing Identification Number (EFIN) for use by a firm if the authorized representative (Responsible Official) has an Individual Taxpayer Identification Number (ITIN).

The Provider must submit an IRS e-file application to obtain an EFIN. The Provider must include its firm information including Employer Identification Number (EIN), address, and phone number. The provider must select "Large Taxpayer" as the Provider Option and then select Form 1042 by choosing the first radio button. The Authorized Users will be the Responsible Official(s) with an Individual Taxpayer Identification Number (ITIN). The Primary Contact may be the same as the Responsible Official. Complete the application as shown on the screenshots below.

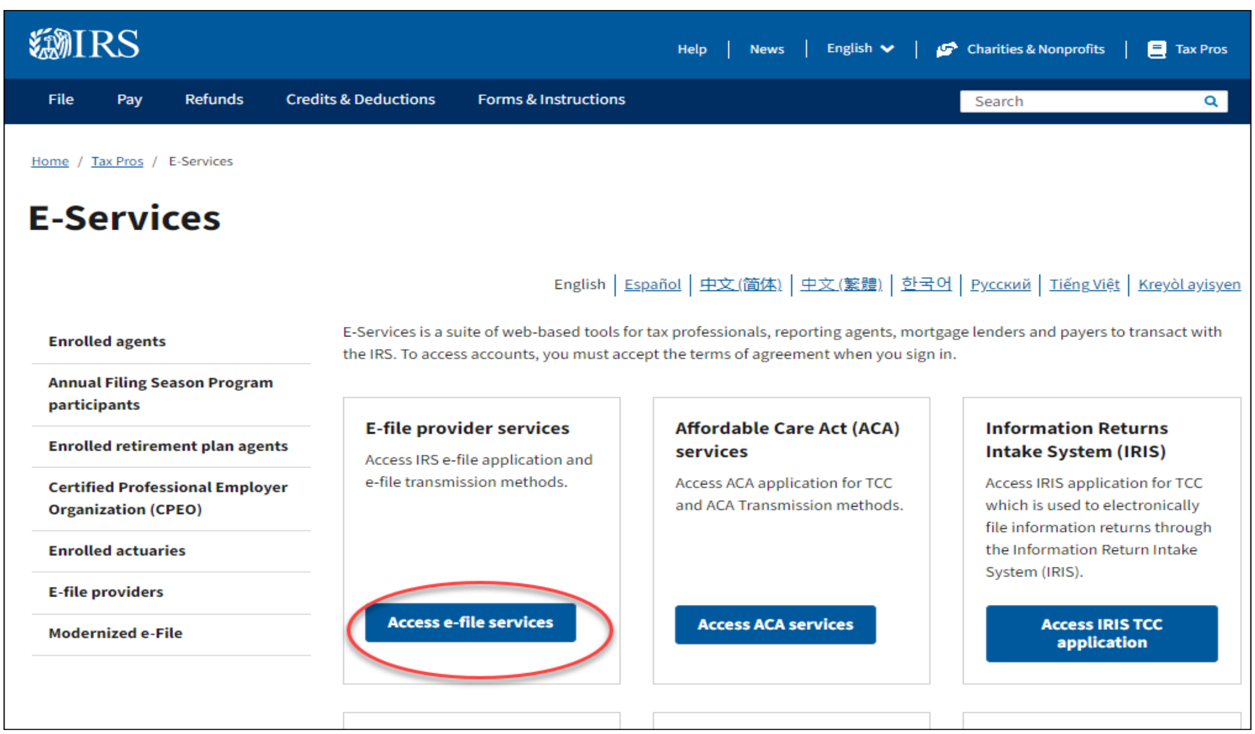
Access **Tax Pros** from irs.gov



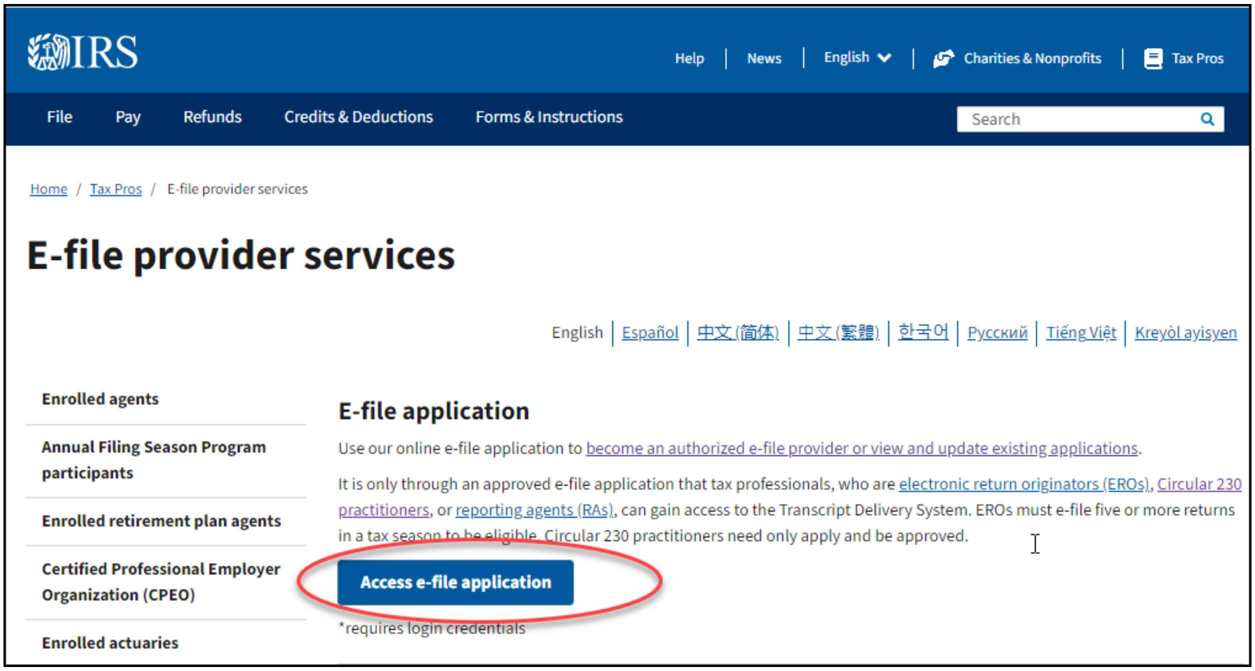
Select **Access e-Services**



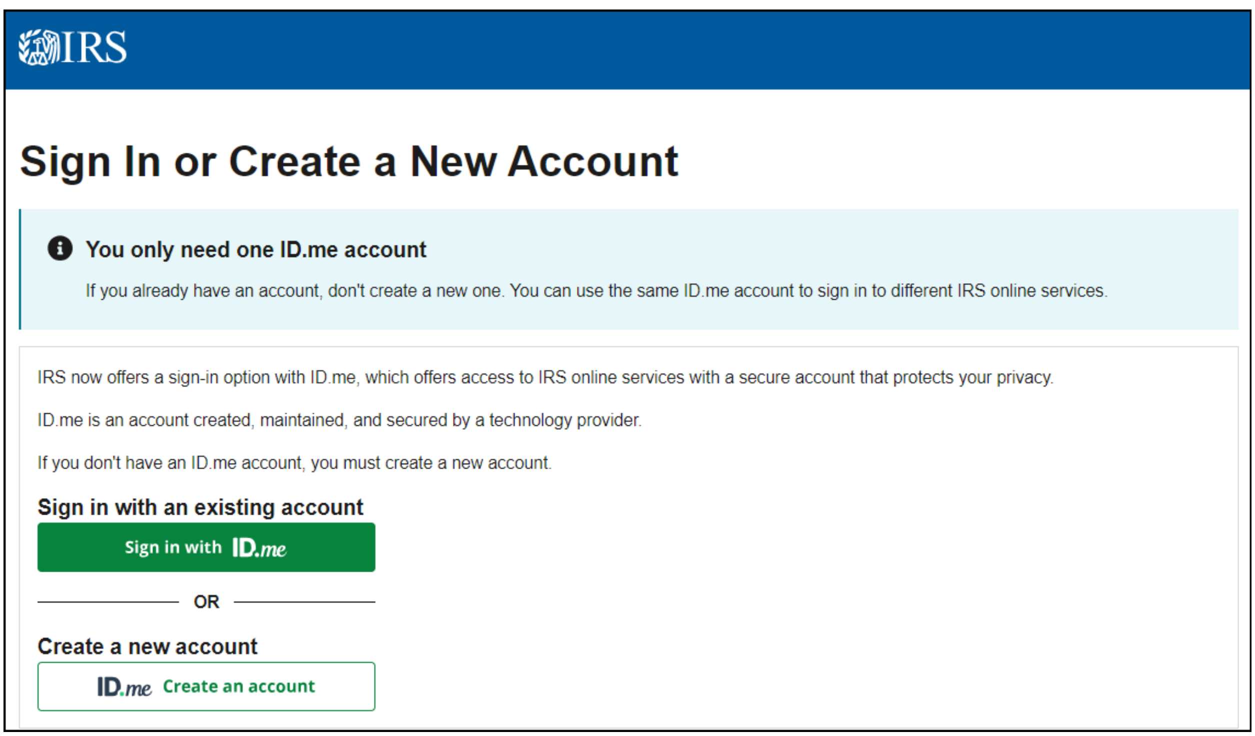
Select **Access e-file services**



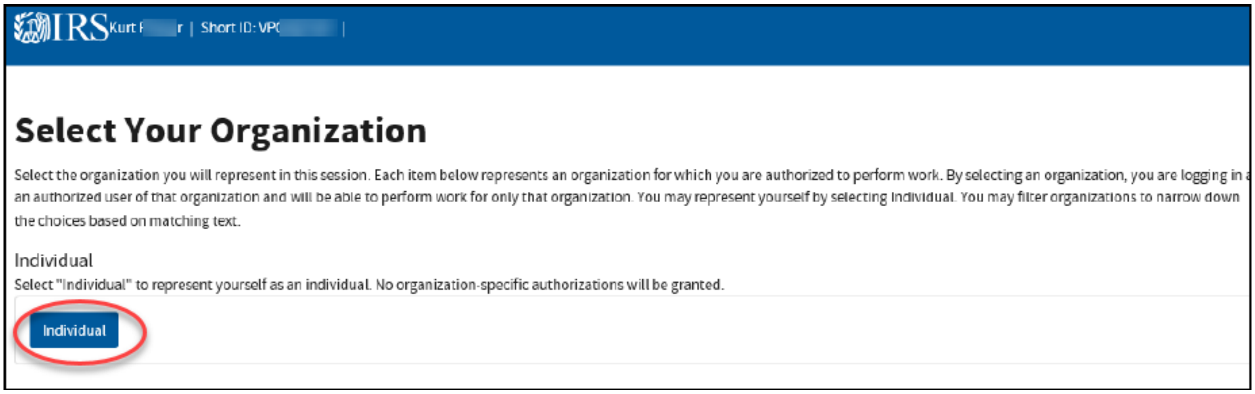
Select **Access e-file application**



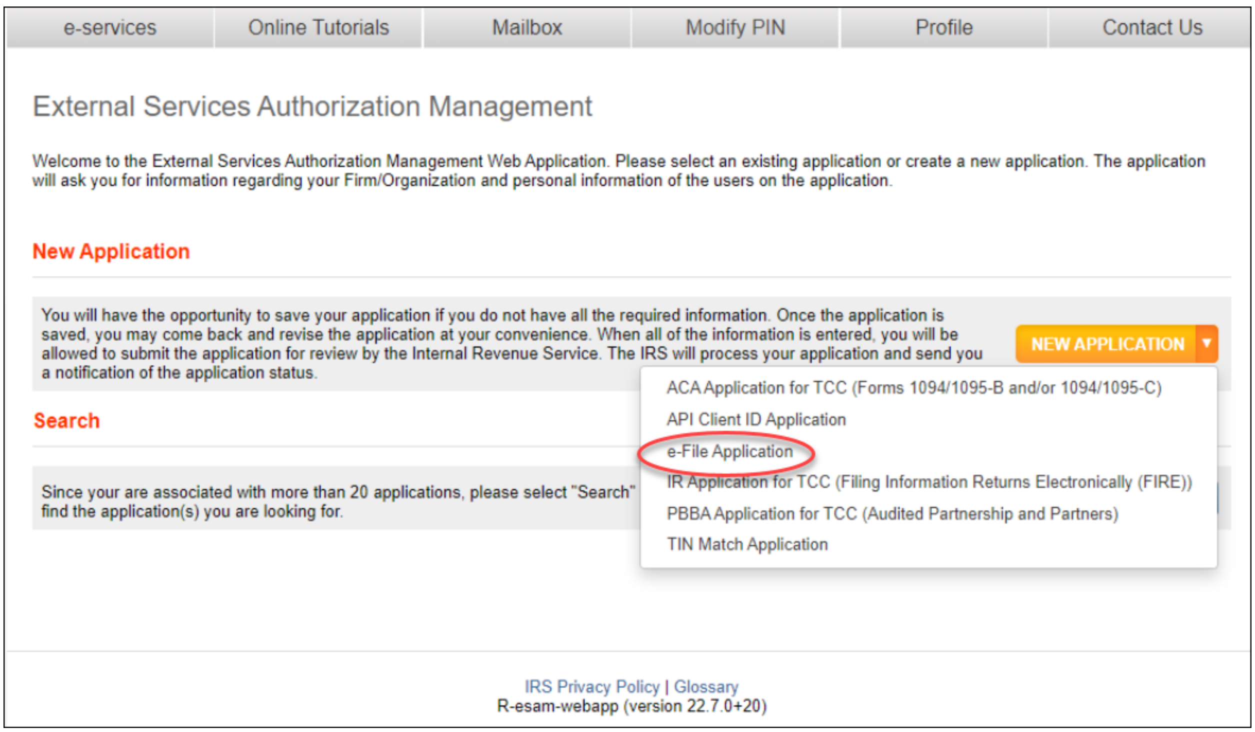
Sign In or **Create a New Account**



To create a new IRS e-file Application choose **Individual**.



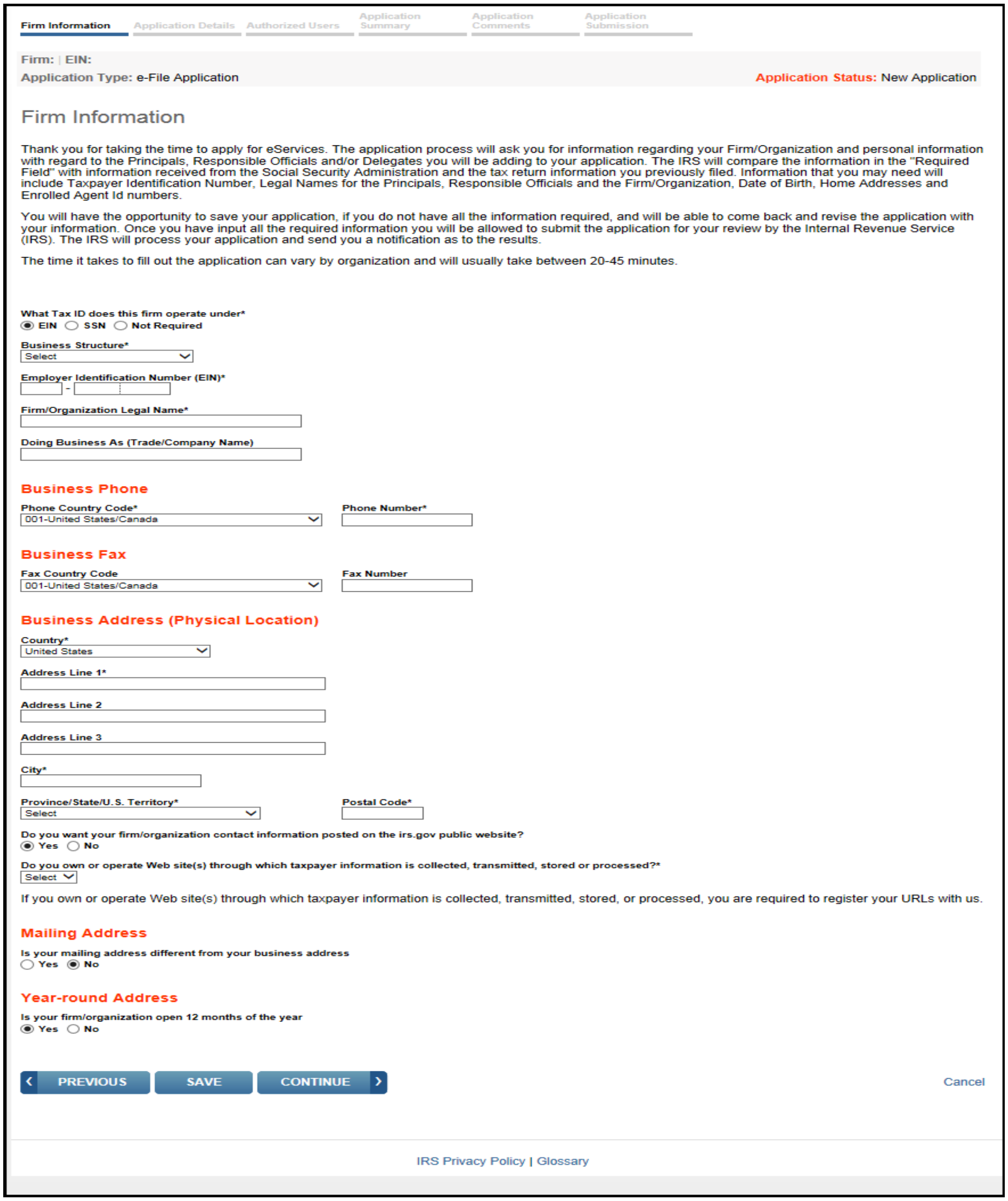
Select **e-File Application** from the drop-down.



Firm Information

Firm Information is the initial screen displayed when you select ‘e-File Application’. All information indicated with an asterisk is required. Only ‘Volunteer Organizations’ can choose ‘None Required’ for the ‘Tax ID’ selection.

The question, ‘Do you want your firm/organization contact information posted on the IRS.gov public website?’ (ERO Locator), defaults to ‘Yes’. If you do not want this posted, select ‘No’.



Firm Information | Application Details | Authorized Users | Application Summary | Application Comments | Application Submission

Firm: | EIN:

Application Type: e-File Application

Application Status: New Application

Firm Information

Thank you for taking the time to apply for eServices. The application process will ask you for information regarding your Firm/Organization and personal information with regard to the Principals, Responsible Officials and/or Delegates you will be adding to your application. The IRS will compare the information in the "Required Field" with information received from the Social Security Administration and the tax return information you previously filed. Information that you may need will include Taxpayer Identification Number, Legal Names for the Principals, Responsible Officials and the Firm/Organization, Date of Birth, Home Addresses and Enrolled Agent Id numbers.

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

The time it takes to fill out the application can vary by organization and will usually take between 20-45 minutes.

What Tax ID does this firm operate under*

EIN SSN Not Required

Business Structure*

Select

Employer Identification Number (EIN)*

Firm/Organization Legal Name*

Doing Business As (Trade/Company Name)

Business Phone

Phone Country Code* 001-United States/Canada

Phone Number*

Business Fax

Fax Country Code 001-United States/Canada

Fax Number

Business Address (Physical Location)

Country* United States

Address Line 1*

Address Line 2

Address Line 3

City*

Province/State/U.S. Territory* Select

Postal Code*

Do you want your firm/organization contact information posted on the irs.gov public website?

Yes No

Do you own or operate Web site(s) through which taxpayer information is collected, transmitted, stored or processed?*

Select

If you own or operate Web site(s) through which taxpayer information is collected, transmitted, stored, or processed, you are required to register your URLs with us.

Mailing Address

Is your mailing address different from your business address

Yes No

Year-round Address

Is your firm/organization open 12 months of the year

Yes No

PREVIOUS SAVE CONTINUE Cancel

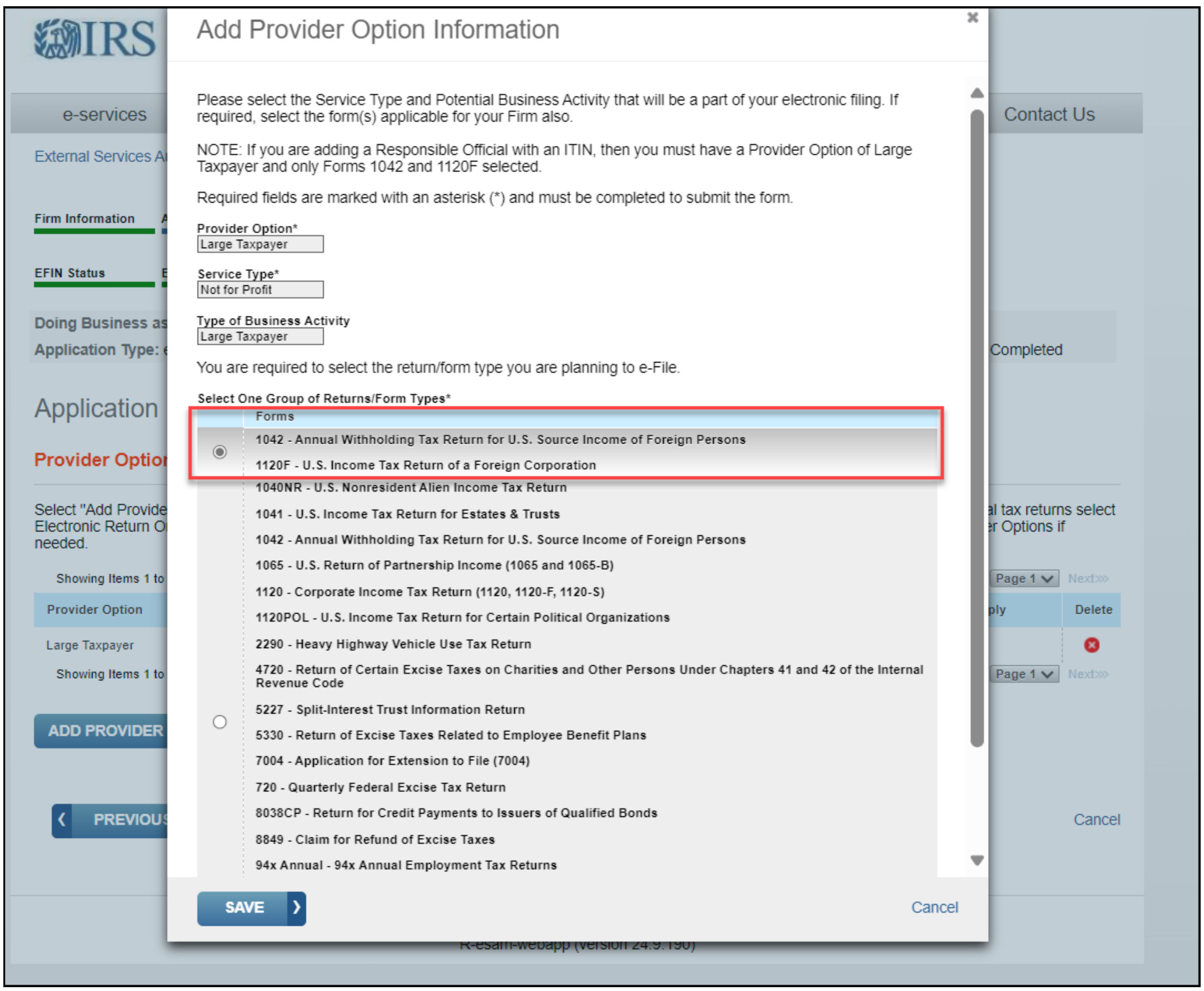
IRS Privacy Policy | Glossary

Add Provider Option Information

Provider options are added by selecting the Provider Option drop-down.

NOTE: When adding a Responsible Official with an Individual Taxpayer Identification Number (ITIN), then you must have a Provider Option of Large Taxpayer and only Forms 1042 and 1120F selected. Choose only the first radio button.

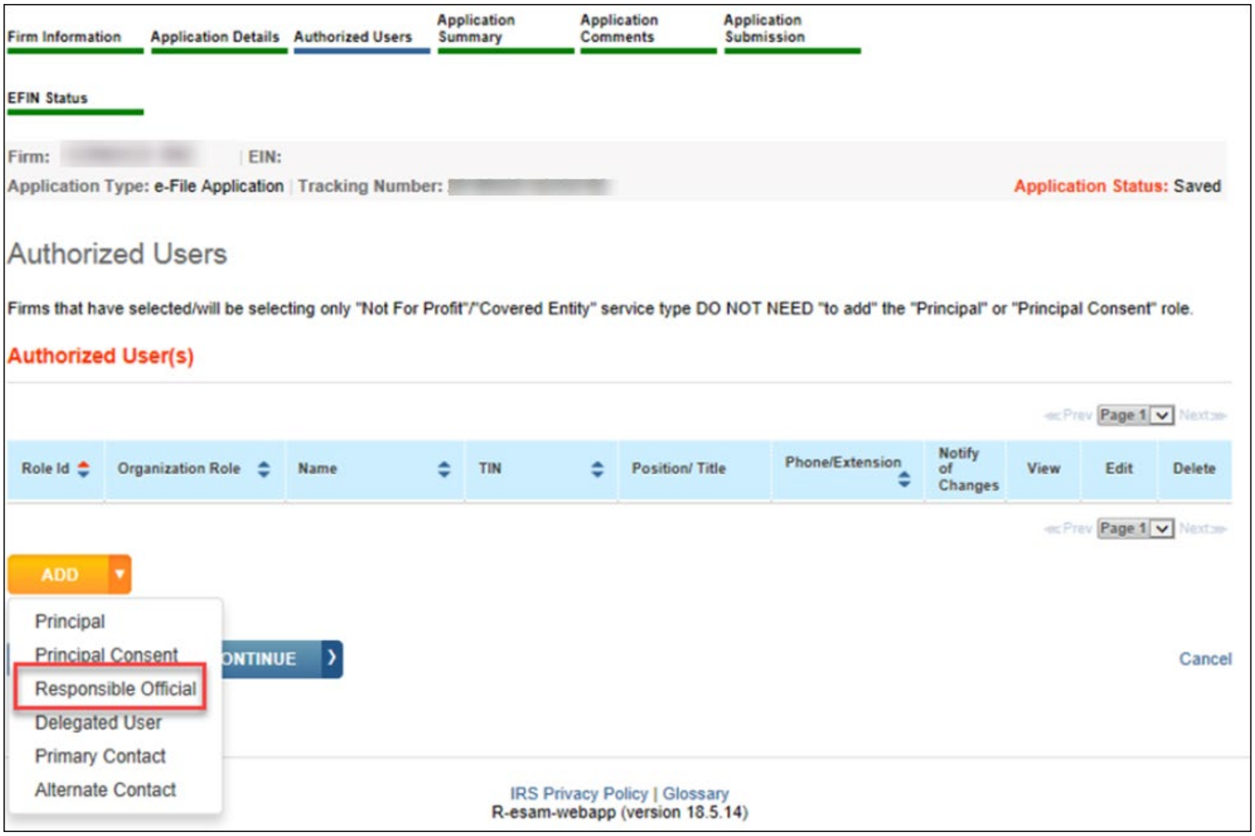
Large Taxpayer - A Large Taxpayer is a Provider Option on the IRS e-file Application, but it is not an Authorized IRS e-file Provider. A Large Taxpayer is a business or other entity with assets of $10 million or more, or a partnership with more than 100 partners, that originates the electronic submission of its own return(s).



Authorized Users

This screen displays the Authorized Users. To add select the ADD button.

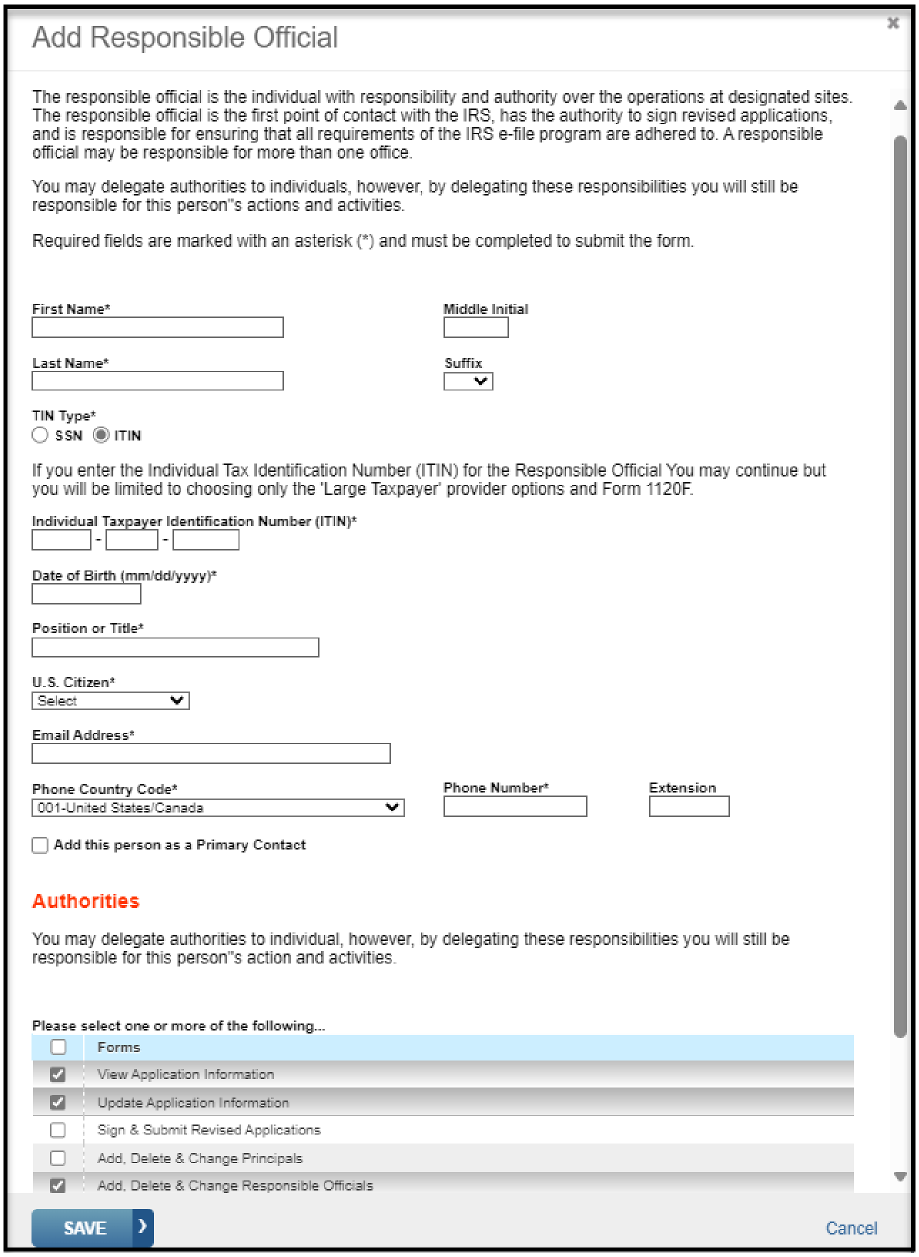
Firms that will be selecting Not for Profit do not need to add Principal or Principal Consent.



Responsible Official

A Responsible Official is an individual with responsibility for and authority over the IRS e-file operation at designated locations. The Responsible Official is the first point of contact with the IRS and has default authorities to view and update the application and add, delete, and change Responsible Officials.

To change the default or add additional authorities of a Responsible Official, select the ‘Authorities’ at the bottom of the page.



Add Responsible Official

×

The responsible official is the individual with responsibility and authority over the operations at designated sites. The responsible official is the first point of contact with the IRS, has the authority to sign revised applications, and is responsible for ensuring that all requirements of the IRS e-file program are adhered to. A responsible official may be responsible for more than one office.

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

Required fields are marked with an asterisk (*) and must be completed to submit the form.

First Name*

Middle Initial

Last Name*

Suffix

TIN Type*

SSN ITIN

If you enter the Individual Tax Identification Number (ITIN) for the Responsible Official You may continue but you will be limited to choosing only the 'Large Taxpayer' provider options and Form 1120F.

Individual Taxpayer Identification Number (ITIN)*

Date of Birth (mm/dd/yyyy)*

Position or Title*

U.S. Citizen*

Select

Email Address*

Phone Country Code*

001-United States/Canada

Phone Number*

Extension

Add this person as a Primary Contact

Authorities

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

Please select one or more of the following...

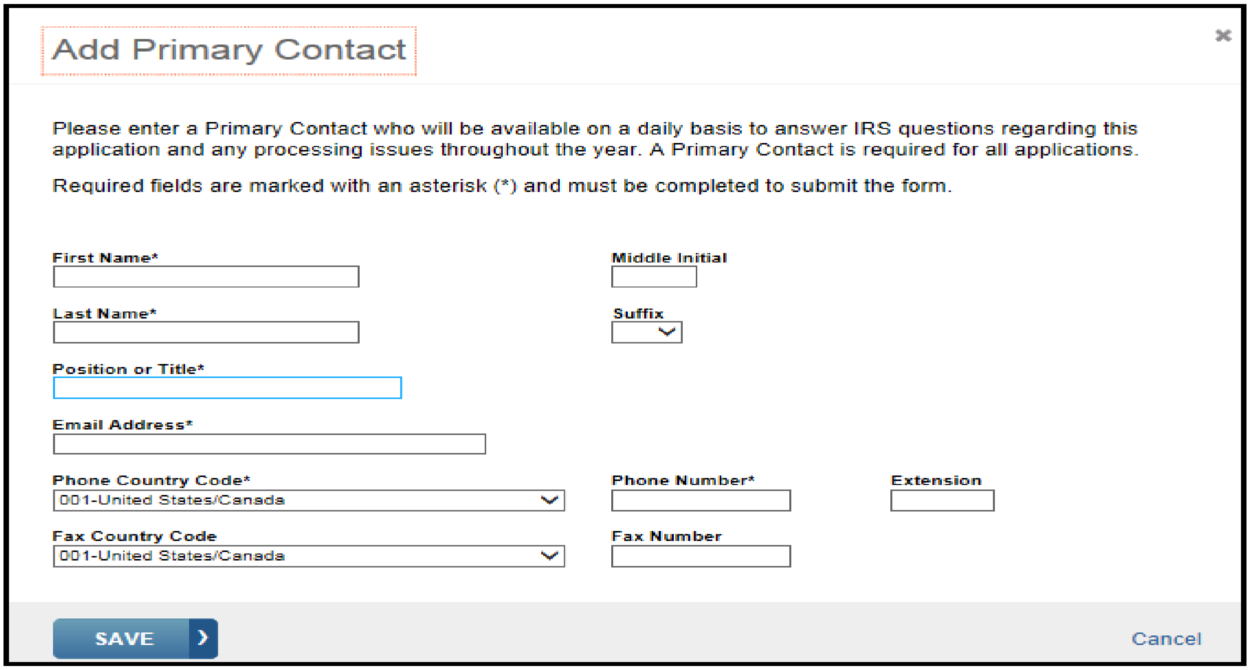
- [ ] Forms
- [x] View Application Information
- [x] Update Application Information
- [ ] Sign & Submit Revised Applications
- [ ] Add, Delete & Change Principals
- [x] Add, Delete & Change Responsible Officials

SAVE

Cancel

Primary Contact

A Primary Contact is required for the application. Complete the Primary Contact section with the required information unless you selected ‘Add this person as a Primary Contact’ on the Principal or Responsible Official page. A Primary Contact is a person who will be available daily to answer IRS questions regarding this application and any processing issues throughout the year. Complete the required information and click ‘SAVE’.



Add Primary Contact

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.

Required fields are marked with an asterisk (*) and must be completed to submit the form.

First Name*

Middle Initial

Last Name*

Suffix

Position or Title*

Email Address*

Phone Country Code*
001-United States/Canada

Phone Number*

Extension

Fax Country Code
001-United States/Canada

Fax Number

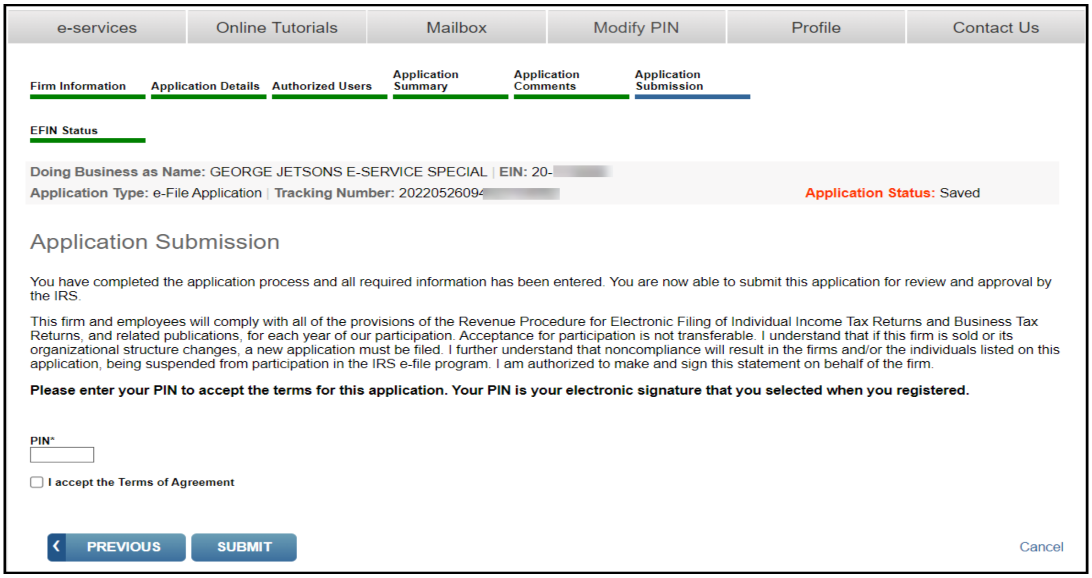
SAVE

Cancel

Application Submission

When you have completed the application process and all required information has been entered, you must SUBMIT the application for review and approval by the IRS.

Enter your five-digit Personal Identification Number (PIN) from the initial registration, check the Terms of Agreement (TOA) box, and select 'SUBMIT'. Only a Principal or designated Responsible Official can submit the application.



Modify PIN

To modify an existing e-Services Personal Identification Number (PIN), select the Modify PIN tab located at the top of the screen. Create a five-digit PIN and submit. This PIN can then be used to sign the e-file application.