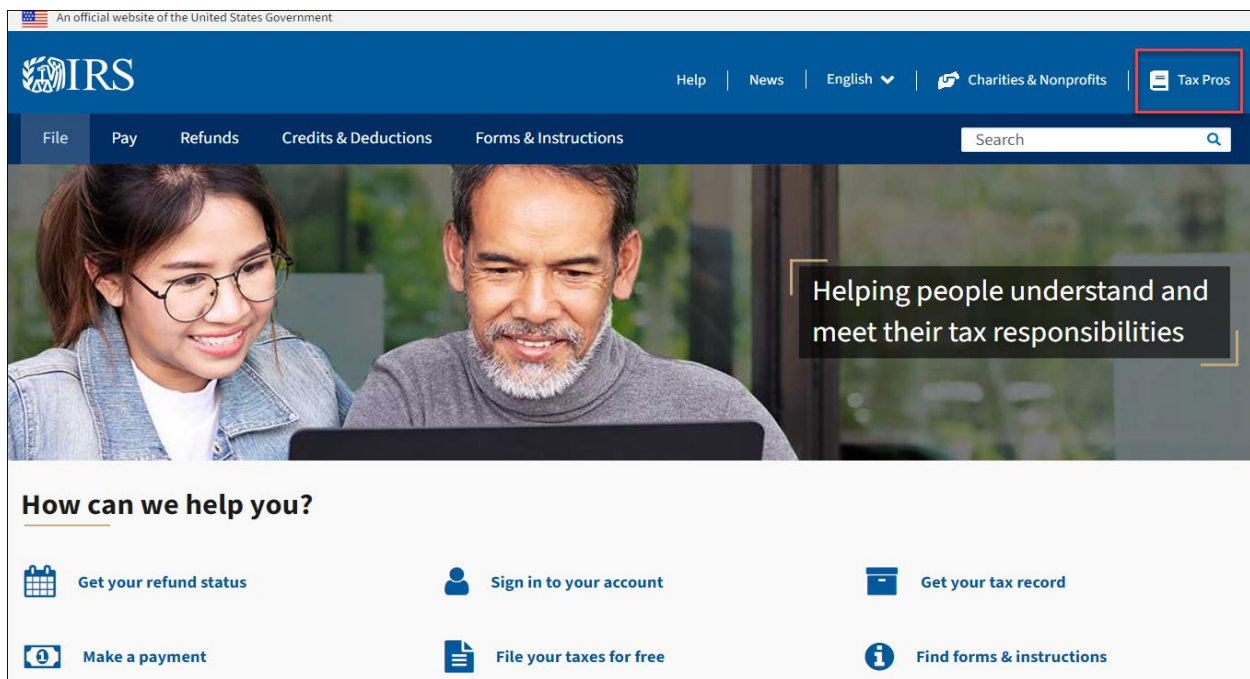


## **Obtaining an EFIN when the Authorized Representative of the Provider has an Individual Taxpayer Identification Number (ITIN)**

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



The screenshot shows the IRS website interface. At the top, there is a blue header with the IRS logo on the left and navigation links for 'Help', 'News', 'English', 'Charities & Nonprofits', and 'Tax Pros' on the right. The 'Tax Pros' link is highlighted with a red rectangular box. Below the header is a dark blue navigation bar with links for 'File', 'Pay', 'Refunds', 'Credits & Deductions', and 'Forms & Instructions', along with a search bar. The main content area features a large image of a woman and a man looking at a laptop. To the right of the image is a text box that reads: 'Helping people understand and meet their tax responsibilities'. Below this is a section titled 'How can we help you?' with six service tiles: 'Get your refund status', 'Sign in to your account', 'Get your tax record', 'Make a payment', 'File your taxes for free', and 'Find forms & instructions'.

## Select Access e-Services

The screenshot shows the IRS website's 'Tax professionals' page. At the top, there is a navigation bar with the IRS logo, 'Help', 'News', 'English', 'Charities & Nonprofits', and 'Tax Pros'. Below this is a secondary navigation bar with 'File', 'Pay', 'Refunds', 'Credits & Deductions', 'Forms & Instructions', and a search bar. The main heading is 'Tax professionals', with a breadcrumb trail 'Home / Tax professionals'. A language selection bar includes 'English', 'Español', '中文(简体)', '中文(繁體)', '한국어', 'Русский', 'Tiếng Việt', and 'Kreyòl ayisyen'. On the left, a sidebar lists categories: 'Enrolled agents', 'Annual Filing Season Program participants', 'Enrolled retirement plan agents', 'Certified Professional Employer Organization (CPEO)', 'Enrolled actuaries', 'E-file providers', and 'Modernized e-File'. The main content area features three cards: 'E-Services' (with a circled 'Access e-Services' button), 'Tax Pro Account' (with a 'Use Tax Pro Account' button), and 'PTIN system' (with a 'Renew or register' button). Below these cards is a section titled 'Request power of attorney or tax information authorization' with a brief description and links.

## Select Access e-file services

The screenshot shows the IRS website's 'E-Services' page. The navigation and secondary navigation bars are identical to the previous page. The breadcrumb trail is 'Home / Tax Pros / E-Services'. The main heading is 'E-Services', with a language selection bar. The sidebar on the left is the same as in the previous page. The main content area includes a paragraph: 'E-Services is a suite of web-based tools for tax professionals, reporting agents, mortgage lenders and payers to transact with the IRS. To access accounts, you must accept the terms of agreement when you sign in.' Below this are three cards: 'E-file provider services' (with a circled 'Access e-file services' button), 'Affordable Care Act (ACA) services' (with an 'Access ACA services' button), and 'Information Returns Intake System (IRIS)' (with an 'Access IRIS TCC application' button).

## Select Access e-file application

The screenshot shows the IRS website's 'E-file provider services' page. At the top, there is a blue navigation bar with the IRS logo, 'Help', 'News', 'English', 'Charities & Nonprofits', and 'Tax Pros'. Below this is a secondary navigation bar with 'File', 'Pay', 'Refunds', 'Credits & Deductions', and 'Forms & Instructions', along with a search bar. The main content area has a breadcrumb trail: 'Home / Tax Pros / E-file provider services'. The title 'E-file provider services' is prominently displayed. Below the title are language options: 'English', 'Español', '中文(简体)', '中文(繁體)', '한국어', 'Русский', 'Tiếng Việt', and 'Kreyòl Ayisyen'. A list of categories is on the left: 'Enrolled agents', 'Annual Filing Season Program participants', 'Enrolled retirement plan agents', 'Certified Professional Employer Organization (CPEO)', and 'Enrolled actuaries'. The 'E-file application' section contains text explaining the process and a blue button labeled 'Access e-file application', which is circled in red. A note below the button states '\*requires login credentials'.

## Sign In or Create a New Account

The screenshot shows the IRS website's 'Sign In or Create a New Account' page. It features the IRS logo at the top left. The main heading is 'Sign In or Create a New Account'. Below this is a light blue informational box with an 'i' icon and the text: 'You only need one ID.me account. If you already have an account, don't create a new one. You can use the same ID.me account to sign in to different IRS online services.' The main content area explains that IRS now offers a sign-in option with ID.me, which provides access to IRS online services with a secure account that protects privacy. It notes that ID.me is an account created, maintained, and secured by a technology provider, and that users must create a new account if they don't have one. There are two main options: 'Sign in with an existing account' with a green button labeled 'Sign in with ID.me', and 'Create a new account' with a green button labeled 'ID.me Create an account'. The two options are separated by a horizontal line with 'OR' in the center.

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

IRS Kurt F. r | Short ID: VPC

## Select Your Organization

Select the organization you will represent in this session. 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 and will be able to perform work for only that organization. You may represent yourself by selecting individual. You may filter organizations to narrow down the choices based on matching text.

**Individual**  
Select "Individual" to represent yourself as an individual. No organization-specific authorizations will be granted.

Individual

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

e-services Online Tutorials Mailbox Modify PIN Profile Contact Us

## External Services Authorization Management

Welcome to the External Services Authorization Management Web Application. Please select an existing application or create a new application. The application will ask you for information regarding your Firm/Organization and personal information of the users on the application.

**New Application**

You will have the opportunity to save your application if you do not have all the required information. Once the application is saved, you may come back and revise the application at your convenience. When all of the information is entered, you will be allowed to submit the application for review by the Internal Revenue Service. The IRS will process your application and send you a notification of the application status.

**NEW APPLICATION** ▾

- ACA Application for TCC (Forms 1094/1095-B and/or 1094/1095-C)
- API Client ID Application
- e-File Application**
- IR Application for TCC (Filing Information Returns Electronically (FIRE))
- PBBA Application for TCC (Audited Partnership and Partners)
- TIN Match Application

**Search**

Since your are associated with more than 20 applications, please select "Search" find the application(s) you are looking for.

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## 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](#)

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## 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).

The screenshot shows the 'Add Provider Option Information' dialog box in the IRS e-file application. The dialog contains the following information:

- Header:** Add Provider Option Information
- Instructions:** Please select the Service Type and Potential Business Activity that will be a part of your electronic filing. If required, select the form(s) applicable for your Firm also.
- NOTE:** If you are adding a Responsible Official with an ITIN, then you must have a Provider Option of Large Taxpayer and only Forms 1042 and 1120F selected.
- Required fields:** Required fields are marked with an asterisk (\*) and must be completed to submit the form.
- Provider Option\*:** Large Taxpayer
- Service Type\*:** Not for Profit
- Type of Business Activity:** Large Taxpayer
- Requirement:** You are required to select the return/form type you are planning to e-File.
- Select One Group of Returns/Form Types\*:**
  - Forms
  - 1042 - Annual Withholding Tax Return for U.S. Source Income of Foreign Persons
  - 1120F - U.S. Income Tax Return of a Foreign Corporation
  - 1040NR - U.S. Nonresident Alien Income Tax Return
  - 1041 - U.S. Income Tax Return for Estates & Trusts
  - 1042 - Annual Withholding Tax Return for U.S. Source Income of Foreign Persons
  - 1065 - U.S. Return of Partnership Income (1065 and 1065-B)
  - 1120 - Corporate Income Tax Return (1120, 1120-F, 1120-S)
  - 1120POL - U.S. Income Tax Return for Certain Political Organizations
  - 2290 - Heavy Highway Vehicle Use Tax Return
  - 4720 - Return of Certain Excise Taxes on Charities and Other Persons Under Chapters 41 and 42 of the Internal Revenue Code
  - 5227 - Split-Interest Trust Information Return
  - 5330 - Return of Excise Taxes Related to Employee Benefit Plans
  - 7004 - Application for Extension to File (7004)
  - 720 - Quarterly Federal Excise Tax Return
  - 8038CP - Return for Credit Payments to Issuers of Qualified Bonds
  - 8849 - Claim for Refund of Excise Taxes
  - 94x Annual - 94x Annual Employment Tax Returns
- Buttons:** SAVE, Cancel

## 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.

[Firm Information](#) | [Application Details](#) | [Authorized Users](#) | [Application Summary](#) | [Application Comments](#) | [Application Submission](#)

**EFIN Status**

Firm: [REDACTED] | EIN: [REDACTED]  
Application Type: e-File Application | Tracking Number: [REDACTED] **Application Status: Saved**

### Authorized Users

Firms that have selected/will be selecting only "Not For Profit"/"Covered Entity" service type DO NOT NEED "to add" the "Principal" or "Principal Consent" role.

**Authorized User(s)**

< Prev Page 1 Next >

Role Id	Organization Role	Name	TIN	Position/ Title	Phone/Extension	Notify of Changes	View	Edit	Delete
---------	-------------------	------	-----	-----------------	-----------------	-------------------	------	------	--------

< Prev Page 1 Next >

**ADD**

- Principal
- Principal Consent
- Responsible Official**
- Delegated User
- Primary Contact
- Alternate Contact

**CONTINUE** > Cancel

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## 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
<input type="text"/>	<input type="text"/>
Last Name*	Suffix
<input type="text"/>	<input type="text"/>

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\*

Email Address\*

Phone Country Code*	Phone Number*	Extension
<input type="text" value="001-United States/Canada"/>	<input type="text"/>	<input type="text"/>

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...

<input type="checkbox"/>	Forms
<input checked="" type="checkbox"/>	View Application Information
<input checked="" type="checkbox"/>	Update Application Information
<input type="checkbox"/>	Sign & Submit Revised Applications
<input type="checkbox"/>	Add, Delete & Change Principals
<input checked="" type="checkbox"/>	Add, Delete & Change Responsible Officials



## 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.

<b>First Name*</b>	<input type="text"/>	<b>Middle Initial</b>	<input type="text"/>
<b>Last Name*</b>	<input type="text"/>	<b>Suffix</b>	<input type="text" value="v"/>
<b>Position or Title*</b>	<input type="text"/>		
<b>Email Address*</b>	<input type="text"/>		
<b>Phone Country Code*</b>	<input type="text" value="001-United States/Canada"/>	<b>Phone Number*</b>	<input type="text"/>
		<b>Extension</b>	<input type="text"/>
<b>Fax Country Code</b>	<input type="text" value="001-United States/Canada"/>	<b>Fax Number</b>	<input type="text"/>

**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.

The screenshot shows the 'Application Submission' page in the e-services portal. At the top, there is a navigation bar with tabs: e-services, Online Tutorials, Mailbox, Modify PIN, Profile, and Contact Us. Below this is a secondary navigation bar with tabs: Firm Information, Application Details, Authorized Users, Application Summary, Application Comments, and Application Submission (which is highlighted in blue). The main content area includes:

- EFIN Status** section with a green underline.
- Text: "Doing Business as Name: GEORGE JETSONS E-SERVICE SPECIAL | EIN: 20-..." and "Application Type: e-File Application | Tracking Number: 20220526094...".
- Application Status: Saved** in red text.
- Application Submission** section header.
- Text: "You have completed the application process and all required information has been entered. You are now able to submit this application for review and approval by the IRS."
- Text: "This firm and employees will comply with all of the provisions of the Revenue Procedure for Electronic Filing of Individual Income Tax Returns and Business Tax Returns, and related publications, for each year of our participation. Acceptance for participation is not transferable. I understand that if this firm is sold or its organizational structure changes, a new application must be filed. I further 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."
- Text: "Please enter your PIN to accept the terms for this application. Your PIN is your electronic signature that you selected when you registered."
- A PIN input field labeled "PIN\*".
- A checkbox labeled "I accept the Terms of Agreement".
- Buttons: "PREVIOUS" (with a left arrow), "SUBMIT", and "Cancel".

## 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.

The screenshot shows the 'Modify PIN' page in the e-services portal. At the top, there is a navigation bar with tabs: e-services, Online Tutorials, Mailbox, Modify PIN, Profile, and Contact Us. The main content area includes:

- e-services PIN** section header.
- Text: "e-services requires each user to have a Personal Identification Number (PIN) to be used to sign your e-file, TIN Matching, IVES and ACA applications. Please enter a five digit PIN (cannot be all the same digits) in the field below and click the submit button."
- Text: "Required fields are marked with an asterisk (\*) and must be completed to submit the form."
- A PIN input field labeled "PIN\*".
- A Confirm PIN input field labeled "Confirm PIN\*".
- Buttons: "SUBMIT" (with a right arrow) and "Cancel".