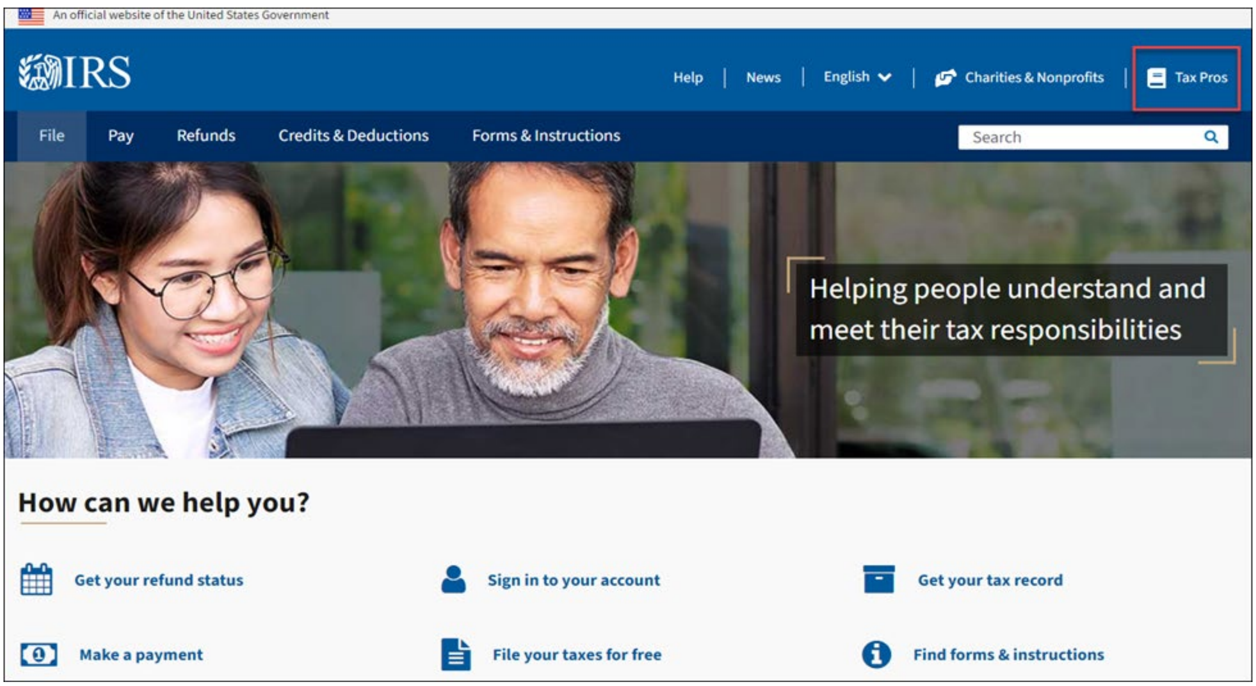
Obtaining an EFIN when the Authorized Representative of the Provider has a Social Security Number (SSN)

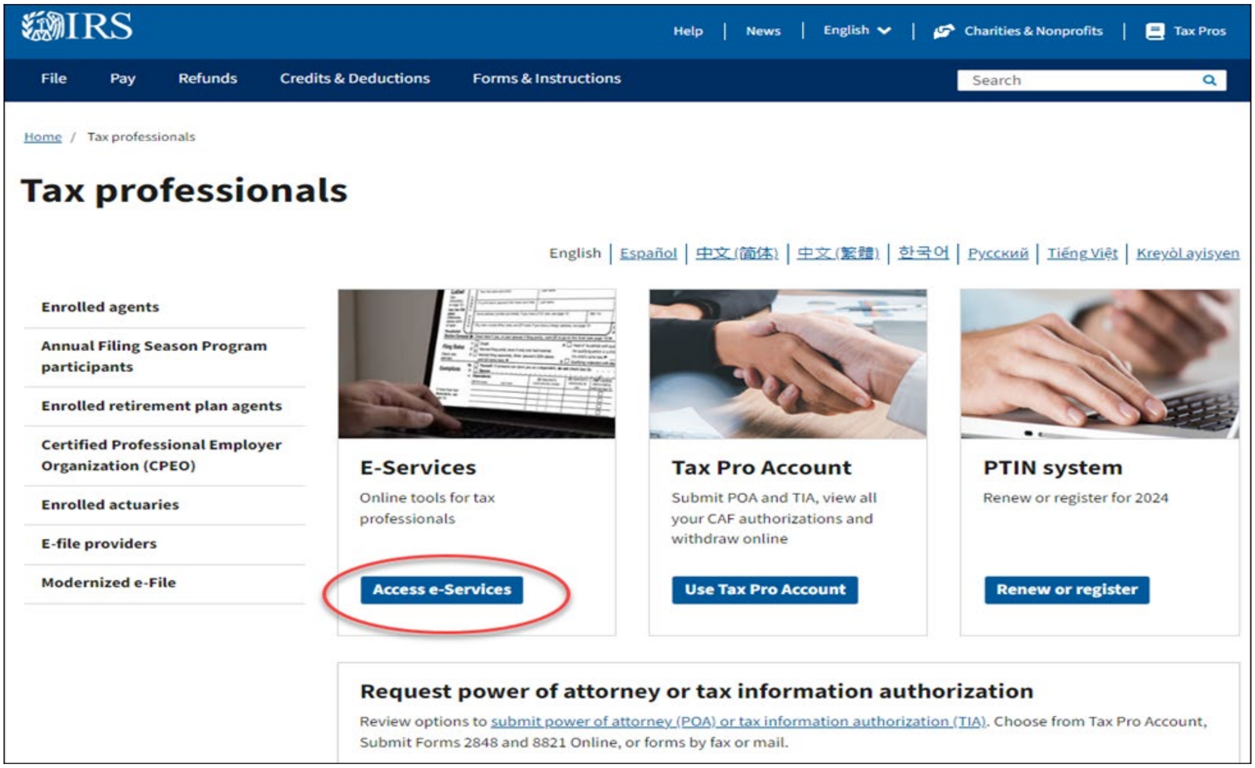
Providers may obtain an Electronic Filing Identification Number (EFIN) for use by a firm if the authorized representative (Responsible Official) has a Social Security Number (SSN).

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 "Electronic Return Originator" as the Provider Option and then select "Not for Profit" as the Service Type and select "Large Taxpayer" as the Type of Business Activity and then select Form 1042. The Authorized Users will be the Responsible Official(s) with a Social Security Number (SSN). The Primary Contact may be the same as the Responsible Official. Complete the application as shown on the screenshots below.

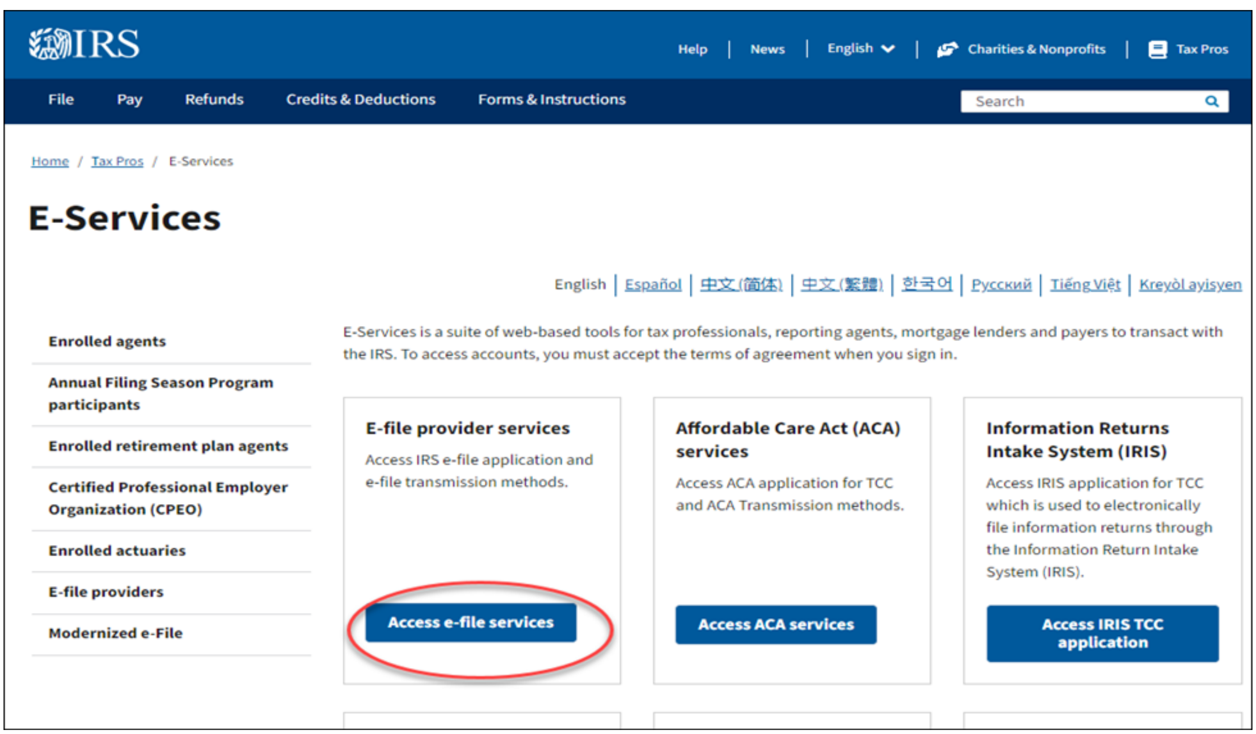
Access **Tax Pros** from irs.gov



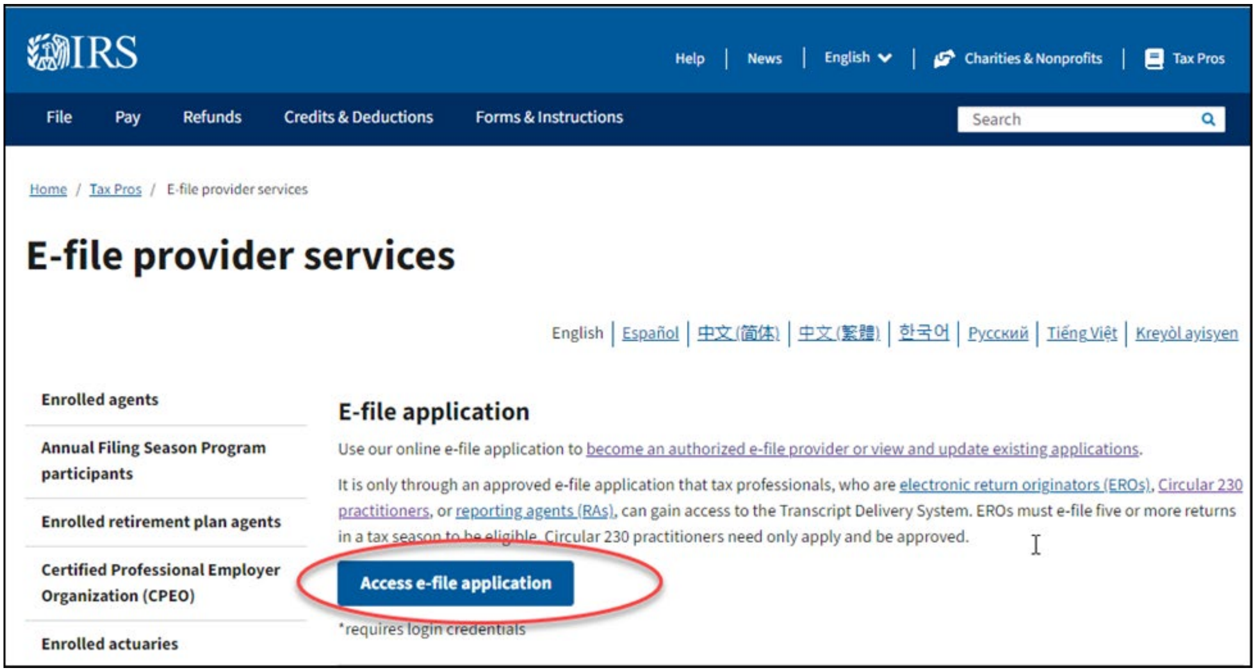
Select **Access e-Services**



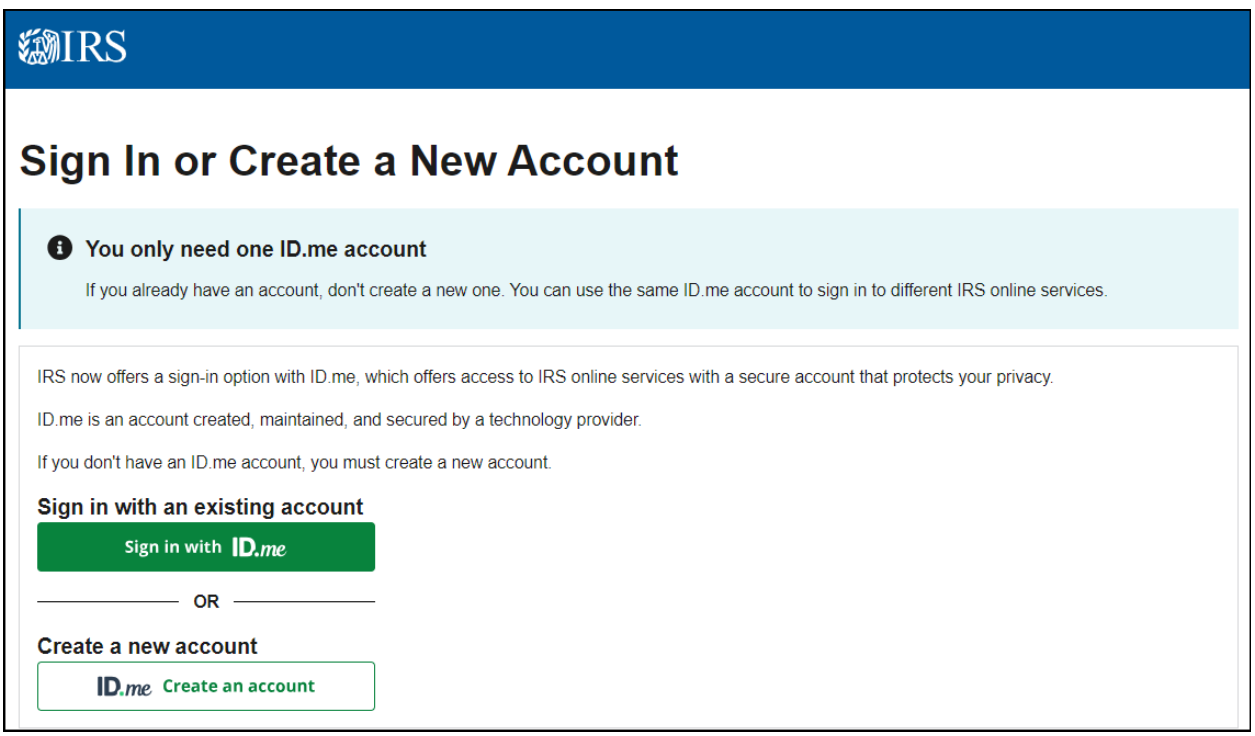
Select **Access e-file services**



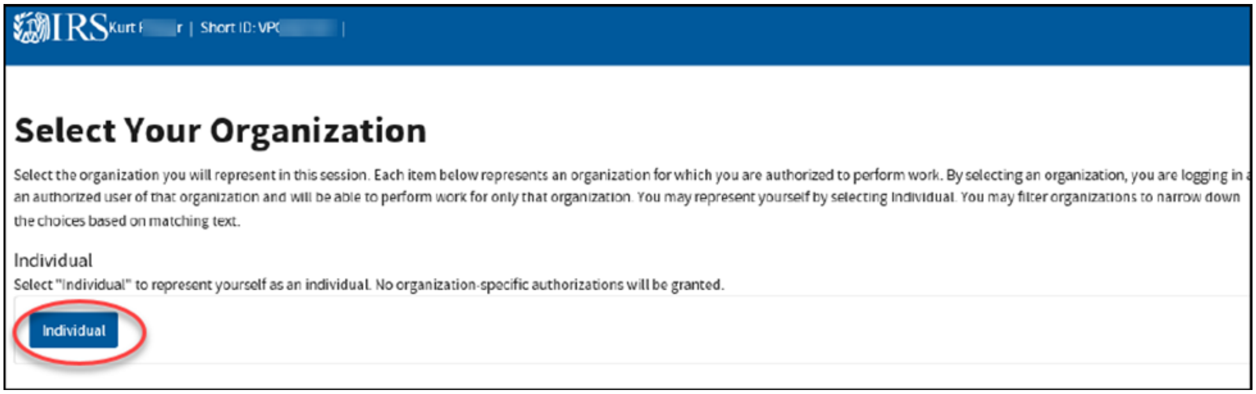
Select **Access e-file application**



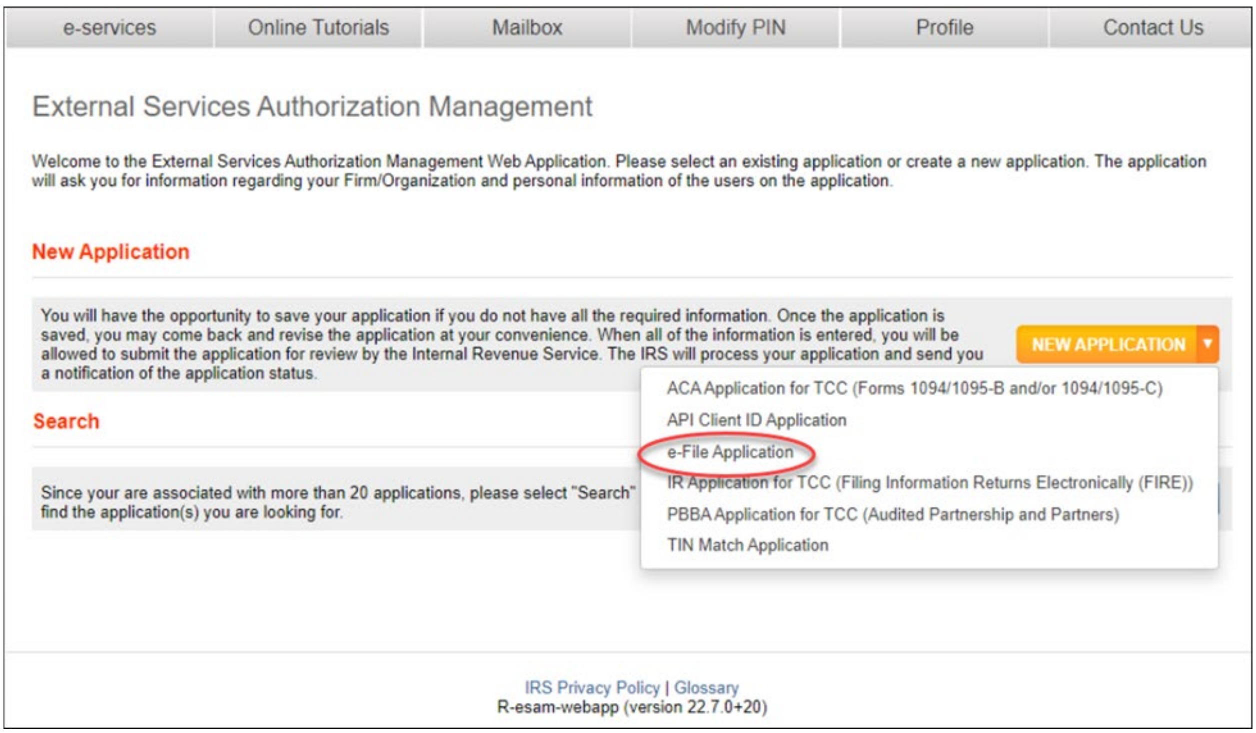
Sign In or **Create a New Account**



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



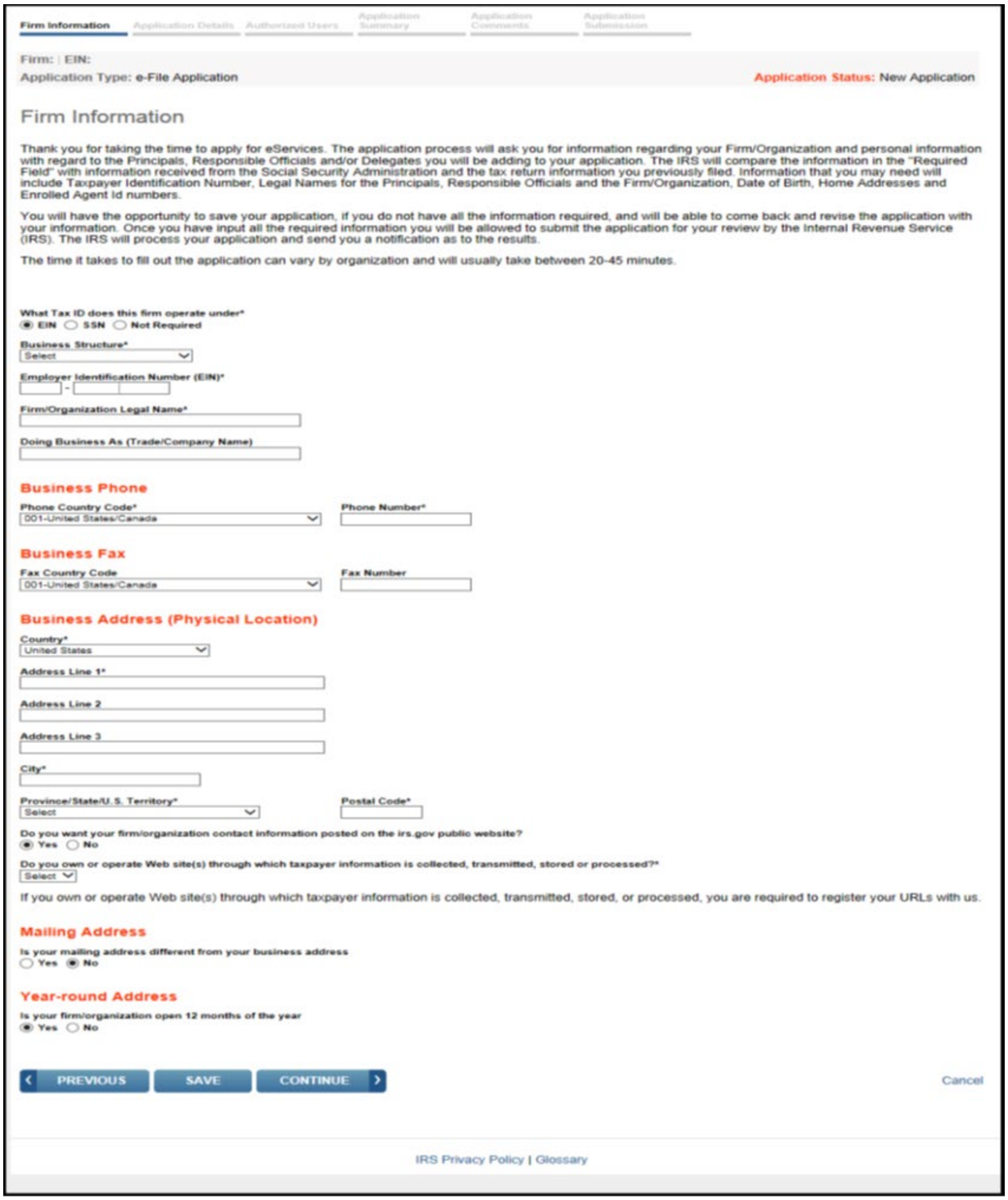
Select **e-File Application** from the drop-down.



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’.



Add Provider Option Information

Add Provider Option Information

Required fields are marked with an asterisk (* mit the form.

Provider Option*

Electronic Return Originator

Service Type*

Not for Profit

Type of Business Activity*

(select)

(select)

Employee Benefit Program

Large Taxpayer

Military Base

Tax Counseling for Elderly

Volunteer Income Tax Assistant

The following list of Return/Form Types are provic

Available Forms
1040 - U.S. Individual Income Tax Return
1040NR - U.S. Nonresident Alien Income Tax Retur
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
2350 - Application for Extension of Time to File U.S. Income Tax Return
4720 - Return of Certain Excise Taxes on Charities and Other Persons Under Chapters 41 and 42 of the Internal Revenue Code
4868 - Application for Automatic Extension of Time to File U.S. Individual Income Tax Return
5227 - Split-Interest Trust Information Return
5330 - Return of Excise Taxes Related to Employee Benefit Plans
56 - Application for Extension to File 56, Notice Concerning Fiduciary Relationship
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
9465 - Installment Agreement Request
94x Annual - 94x Annual Employment Tax Returns
94x Qtrly - 94x Quarterly Employment Tax Returns
94xPINReg - 94x On-Line Signature PIN Registration (94xPINReg)
990 - Return of Organization Exempt from Income Tax (990, 990-EZ, 990-N, 990-PF) and Application for Extension to File (8868)
990T - Exempt Organization Business Income Tax Return (and proxy tax under section 6033(e))

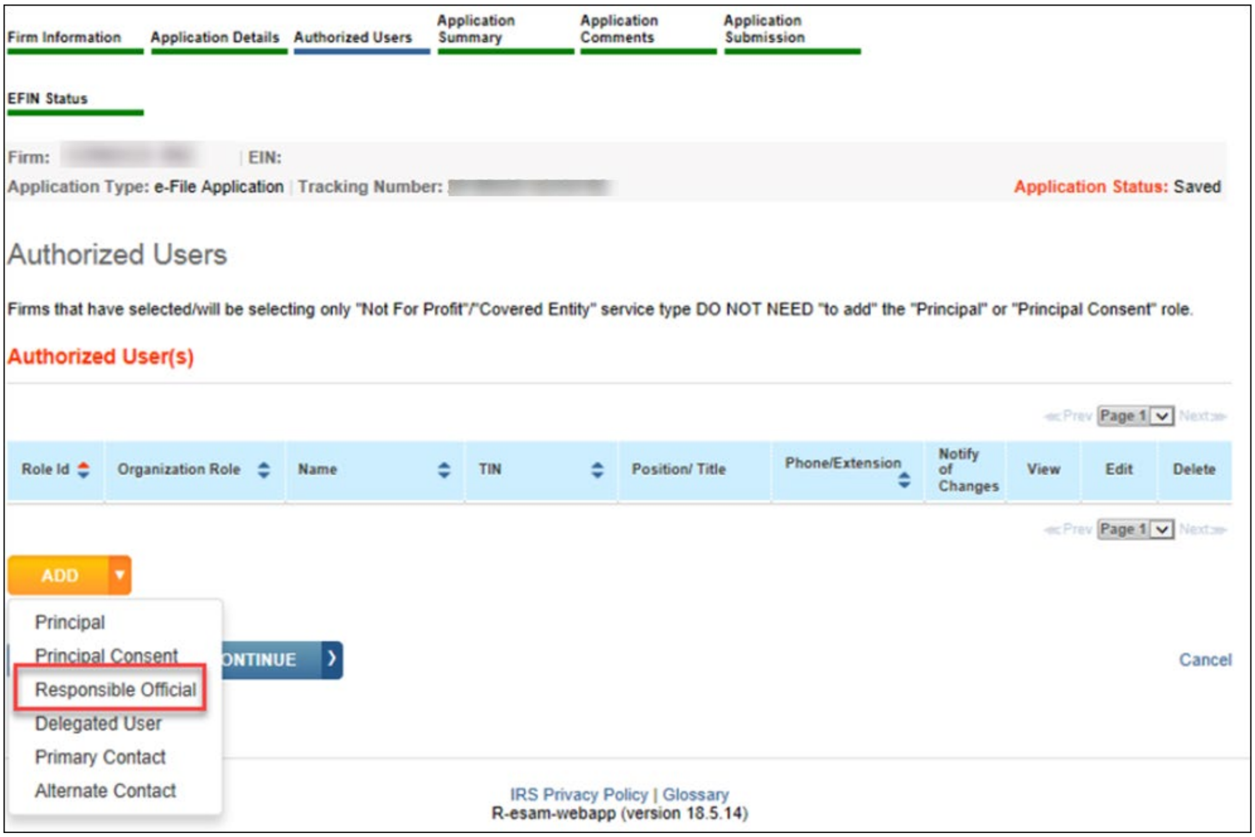
SAVE

Cancel

Authorized Users

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

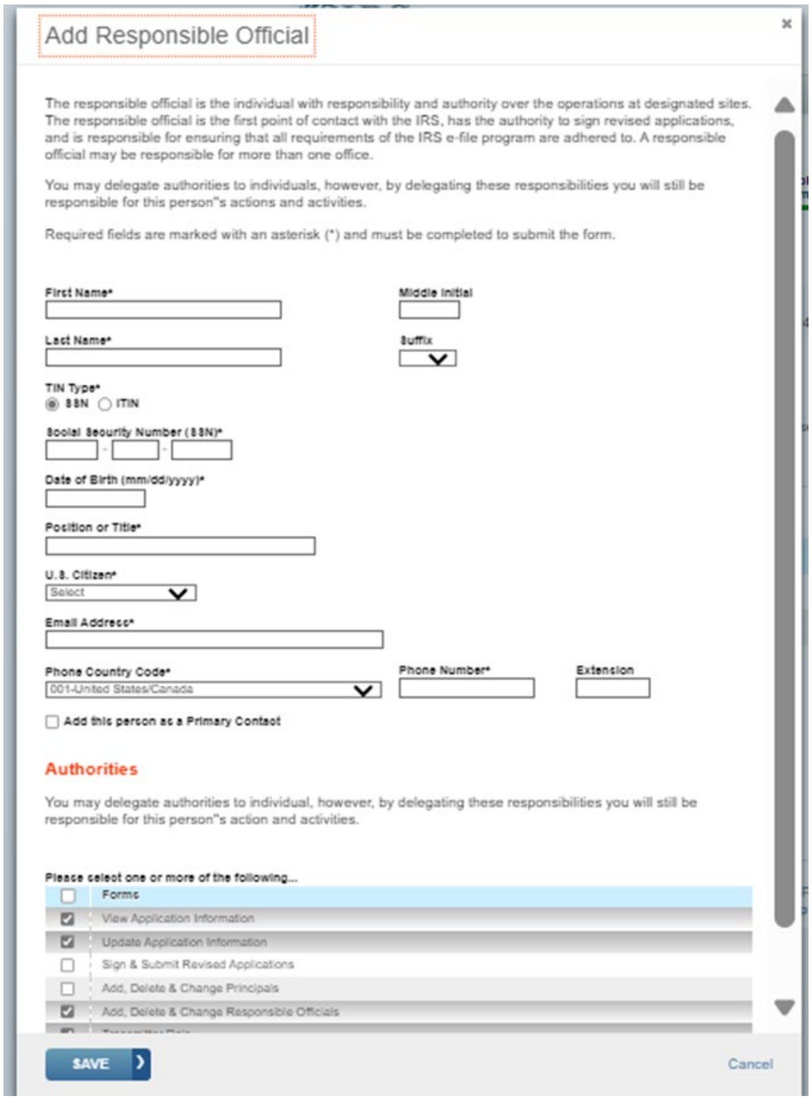
Firms that will be selecting Not For Profit do not need to add Principal or Principal Consent.



Responsible Official

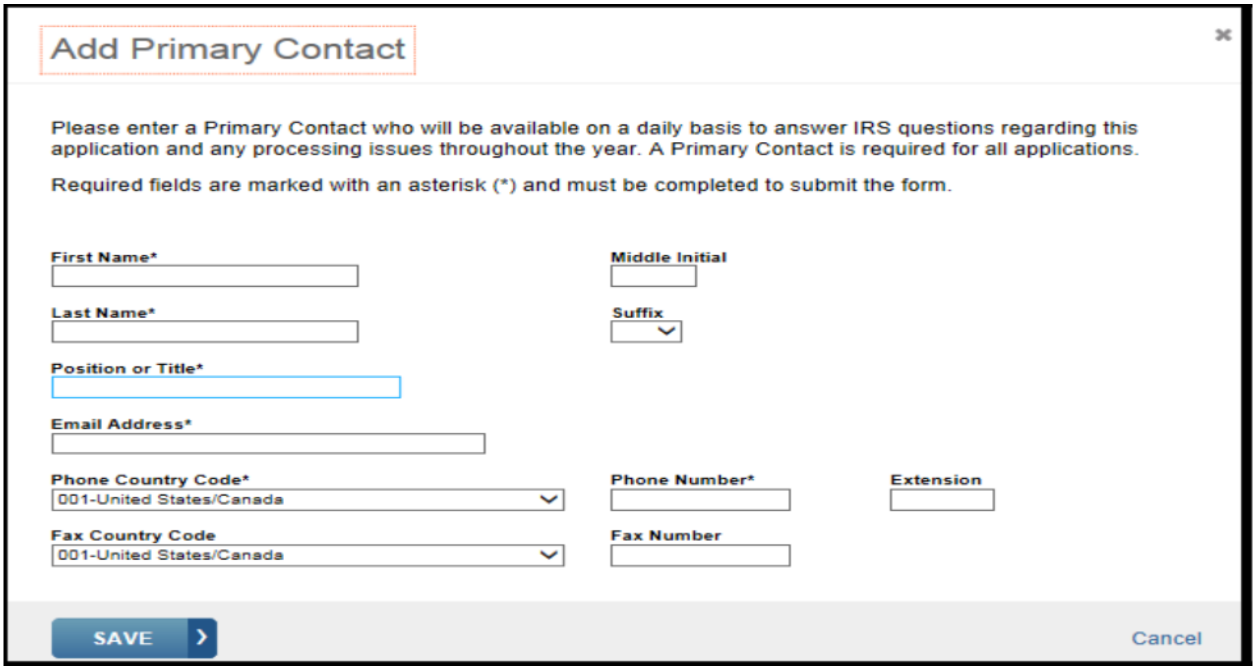
A Responsible Official is an individual with responsibility for and authority over the IRS e-file operation at designated locations. The Responsible Official is the first point of contact with the IRS and has default authorities to view and update the application and add, delete, and change Responsible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

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



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

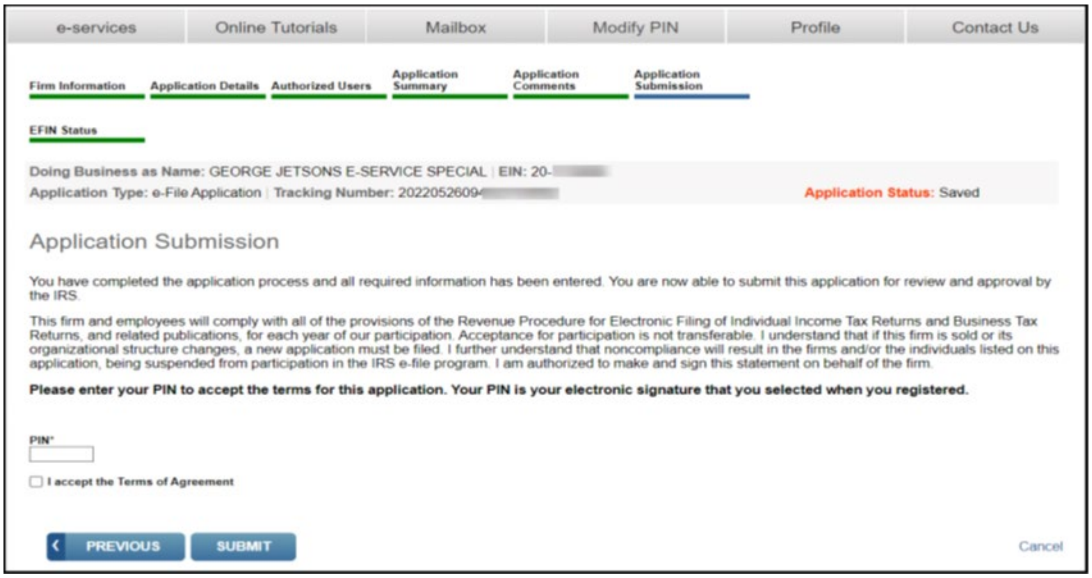
SAVE

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.