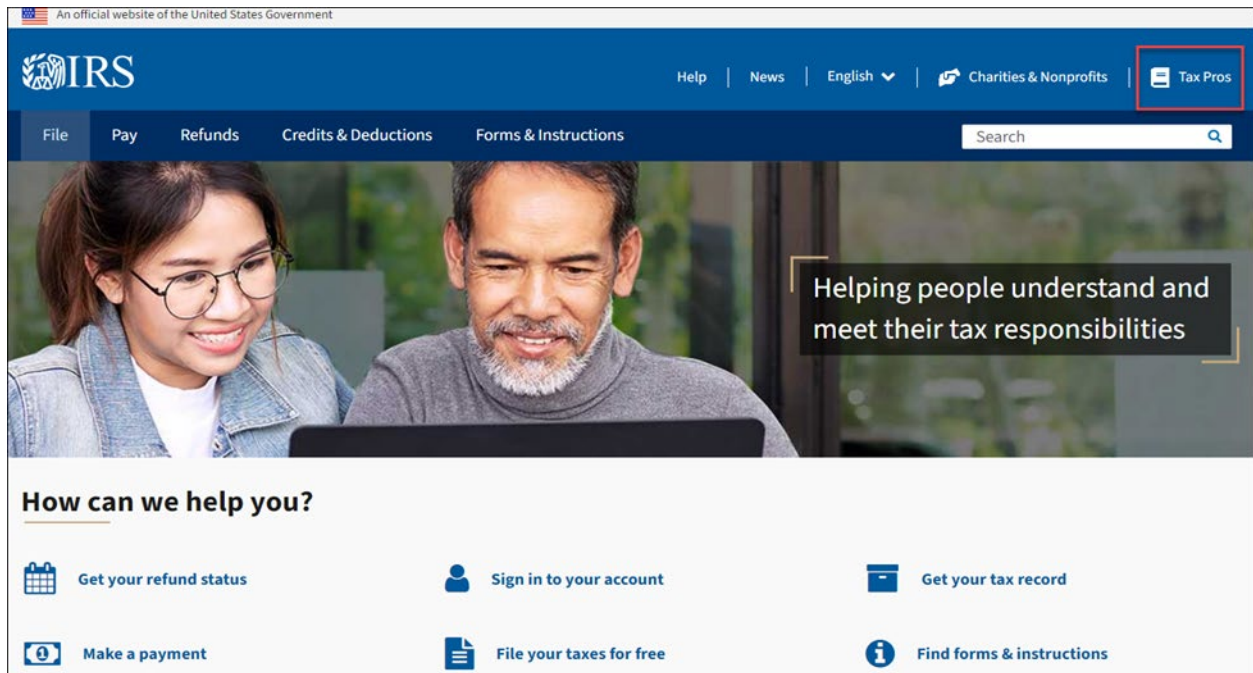


Obtaining an EFIN when the Authorized Representative of the Provider has a Social Security Number (SSN)

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



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. The 'Tax Pros' link is highlighted with a red rectangular box. Below the header is a 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, with a text overlay that reads: "Helping people understand and meet their tax responsibilities". Below this image 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'. A sidebar on the left lists various roles: 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 for 'Request power of attorney or tax information authorization' with a brief description and links to POA and TIA options.

Select Access e-file services

The screenshot shows the IRS website's 'E-Services' 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 'E-Services'. A sidebar on the left lists various roles: 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-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). A paragraph of text explains that E-Services is a suite of web-based tools for tax professionals, reporting agents, mortgage lenders and payers to transact with the IRS, and that users must accept terms of agreement when signing in.

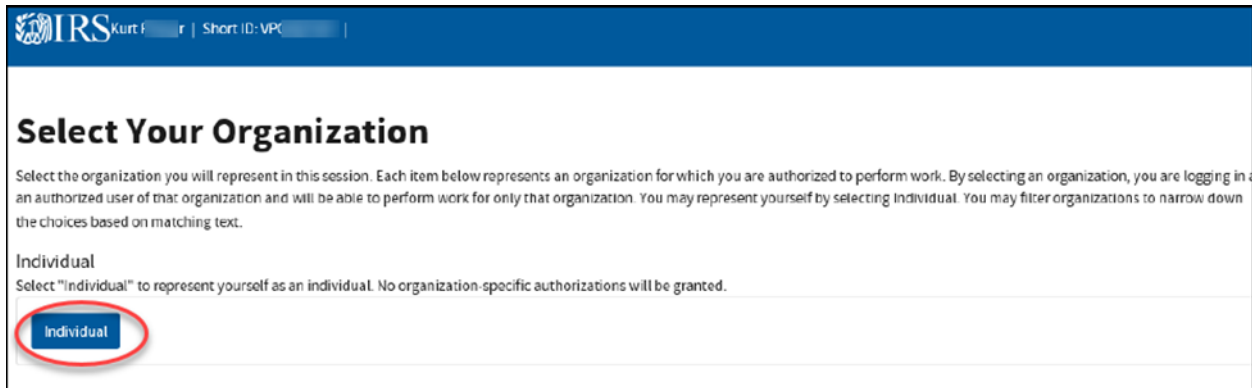
Select Access e-file application

The screenshot shows the IRS website's 'E-file provider services' page. The top navigation bar includes 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 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. The top navigation bar includes the IRS logo. 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.' Below this is a white box with text explaining the ID.me sign-in option: 'IRS now offers a sign-in option with ID.me, which offers access to IRS online services with a secure account that protects your privacy. ID.me is an account created, maintained, and secured by a technology provider. If you don't have an ID.me account, you must create a new account.' At the bottom, there are two options: 'Sign in with an existing account' with a green 'Sign in with ID.me' button, and 'Create a new account' with a green 'ID.me Create an account' button. The word 'OR' is centered between the two options.

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



IRS Kurt F. | Short ID: VPC

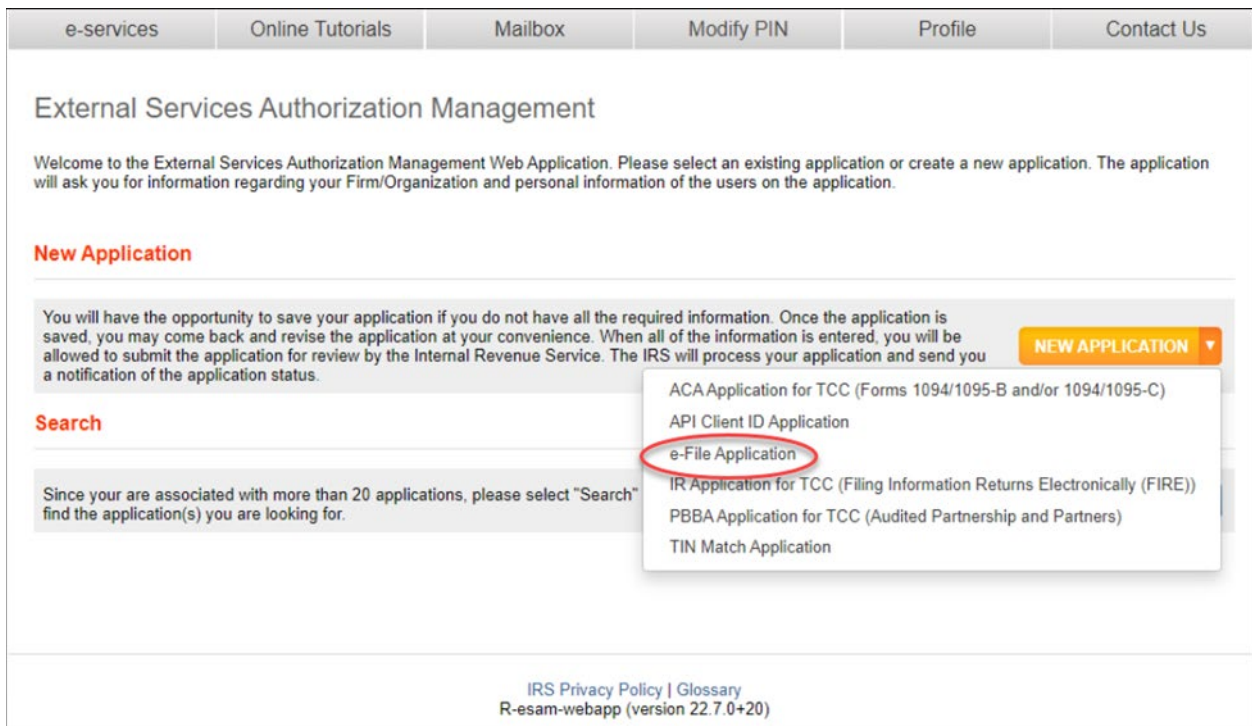
Select Your Organization

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.

Search

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

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

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R-esam-webapp (version 22.7.0+20)

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

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Add Provider Option Information

Add Provider Option Information ✕

Required fields are marked with an asterisk (*). Please complete all required fields before submitting the form.

Provider Option*
Electronic Return Originator

Service Type*
Not for Profit

Type of Business Activity*
(select)

The following list of Return/Form Types are provided:

Available Forms
1040 - U.S. Individual Income Tax Return
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
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.

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**

Last Name* **Suffix**

TIN Type*
 SSN ITIN

Social Security Number (SSN)*
 - -

Date of Birth (mm/dd/yyyy)*

Position or Title*

U.S. Citizen*

Email Address*

Phone Country Code* **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
- View Application Information
- Update Application Information
- Sign & Submit Revised Applications
- Add, Delete & Change Principals
- Add, Delete & Change Responsible Officials

SAVE

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*	<input type="text"/>	Middle Initial	<input type="text"/>
Last Name*	<input type="text"/>	Suffix	<input type="text" value="v"/>
Position or Title*	<input type="text"/>		
Email Address*	<input type="text"/>		
Phone Country Code*	<input type="text" value="001-United States/Canada"/>	Phone Number*	<input type="text"/>
Fax Country Code	<input type="text" value="001-United States/Canada"/>	Fax Number	<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 are navigation tabs: e-services, Online Tutorials, Mailbox, Modify PIN, Profile, and Contact Us. Below these are sub-tabs: Firm Information, Application Details, Authorized Users, Application Summary, Application Comments, and Application Submission (which is highlighted). The page displays 'EFIN Status' and 'Doing Business as Name: GEORGE JETSONS E-SERVICE SPECIAL | EIN: 20-'. Below this, it shows 'Application Type: e-File Application | Tracking Number: 2022052609' and 'Application Status: Saved'. The main heading is 'Application Submission'. The text explains that the user has completed the application process and can now submit it for review and approval by the IRS. It includes a disclaimer about compliance with the Revenue Procedure for Electronic Filing of Individual Income Tax Returns and Business Tax Returns. A note states: 'Please enter your PIN to accept the terms for this application. Your PIN is your electronic signature that you selected when you registered.' There is a 'PIN*' input field, a checkbox for 'I accept the Terms of Agreement', and buttons for 'PREVIOUS', '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 are navigation tabs: e-services, Online Tutorials, Mailbox, Modify PIN, Profile, and Contact Us. The main heading is 'e-services PIN'. The text explains that e-services requires each user to have a Personal Identification Number (PIN) to be used to sign their e-file, TIN Matching, IVES and ACA applications. It asks the user to enter a five-digit PIN (cannot be all the same digits) in the field below and click the submit button. A note states: 'Required fields are marked with an asterisk (*) and must be completed to submit the form.' There are two input fields: 'PIN*' and 'Confirm PIN*'. There is a 'SUBMIT' button and a 'Cancel' link.