# IRS
# e-Services'
# e-file Application Process
# for Large Corporations
# Required to e-file

# What is e-Services?

- Suite of products designed for tax professionals and taxpayers to do business with IRS electronically
- Includes:
  - Registration
  - *e-file* Application
  - Preparer Tax Identification Number (PTIN) Application
  - Tax Identification Number (TIN) Matching Application
  - *e-filing* "Incentive" Products
- Accessed through a secure environment known as the "**Registered User Portal** (**RUP**)"

# How do I get started?

- Every person in your corporation who will be identified on your e-file Application will need to Register with e-Services
- Registration is a one-time, universal process that authenticates you and allows you to do business electronically with IRS
- Follow the instructions in "IRS e-file for Large Taxpayers Filing Their Own Corporate Income Tax Return" on irs.gov/e-file for Large and Mid Size Corporations

**Now that you have successfully registered, you will create your Corporation's *e-file* Application**

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

- Provides authorization to *e-file* your corporation's return
  - Electronic Filing Identification Number (EFIN)
  - Electronic Transmitter Identification Number (ETIN)
- Establishes the form type (1120/1120S) you will file with IRS
- Establishes the transmission channel for your return

# What do I need to determine 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 Application. You will need to decide:

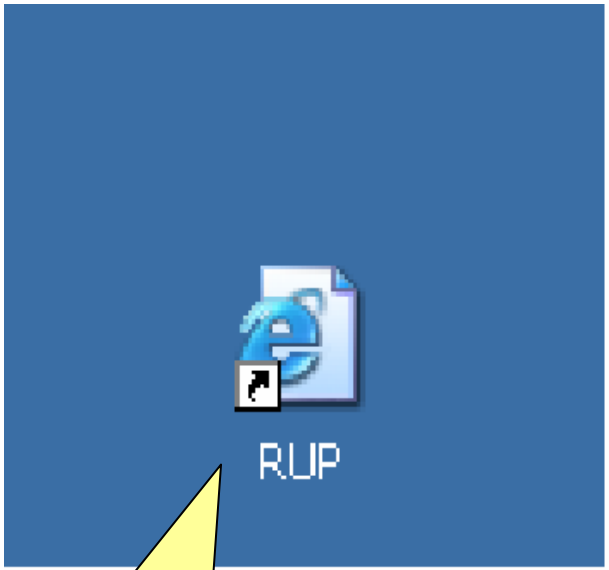
1. Who will be your Responsible Official(s) (you can have up to five; it is a good idea to have at least two for back-up purposes) and what authorities they will have

2. Who will be your Delegated Users and what authorities they will have

3. What form(s) you will e-file

4. How you will transmit your return (transmission channel)

# Start at e-Services Registered User Portal (RUP)




**Go to your desktop icon that you created when you registered with e-Services**

**OR**

- Go to irs.gov
- Click on the *e-file*
- logo
- Click on the
- "e-Services" link under "*e-file* for Tax Professionals"
- Click the "Already Registered? Login" link

Login - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Search Favorites

Address https://la.www4.irs.gov/pub/rup_login/?TYPE=33554432&REALMOID=06-3e42c2f4-1c41-0019-0000-25b0000025b0&GUID=&SMAUTHREASON=0&TARGET=$SM$l Go Links

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IRS Home > Tax Professionals > Login

## Login

Username

Password

Not registered? Register here

FORGOT YOUR PASSWORD?

password is not working for some reason, click here to get a new one. You will need your username, name, the original registration.

ed States Government System, which may be used only for authorized purposes. Unauthorized modification in criminal prosecution. The Government may monitor and audit the usage of this system, and all persons itutes consent to such monitoring and auditing. Unauthorized attempts to upload information and/or hibited and are subject to prosecution under the Computer Fraud and Abuse Act of 1986 and Title 18

I Accept | I Do Not Accept

e-Services Privacy Policy | Taxpayer Advocate | Contact Us

**Login with the Username and Password you created when you registered with e-Services.**

**Click "I Accept".**

Local intranet

Start | Sent Items - Microsoft O... | Microsoft PowerPoint - [... | Login - Microsoft Inte... | 7:06 AM

Customer-facing registry content - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Search Favorites

Address https://la.www4.irs.gov/PORTAL-PROD/psp/CRM/CUSTOMER/CRM/h/?tab=DEFAULT Go Links

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services

Application

Registration Services

**Welcome to IRS e-services**

**Elizabeth Kelley**
Representing DAVIS HATTON MORRIS HECK CORP - TEST

**Application**
Access to apply or revise an existing application on-line for participation in IRS *e-file* Program, Preparer Tax Identification Number (PTIN) or Taxpayer Identification Number (TIN) Matching.

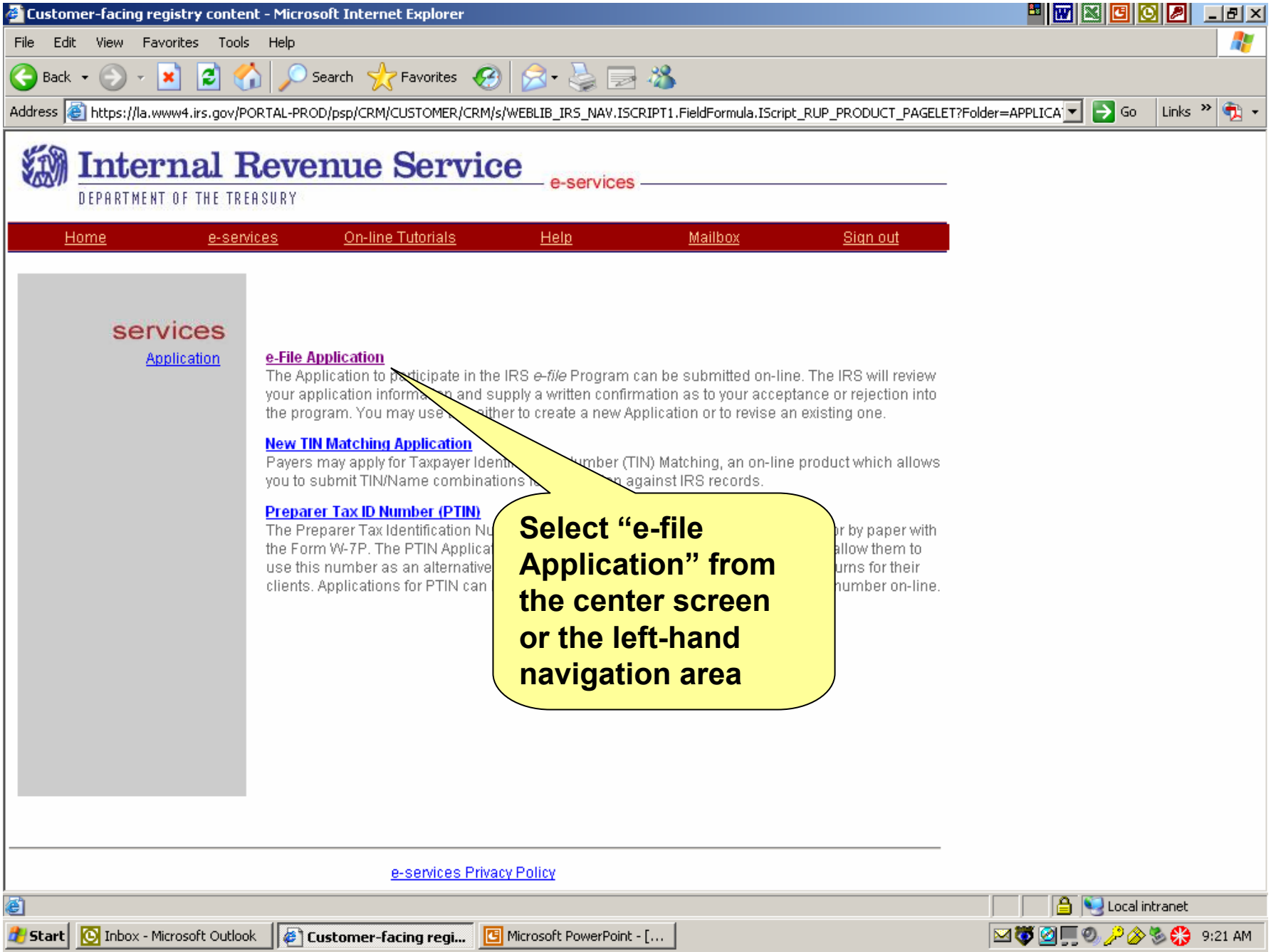
**Registration Services**
Registration Services allows you to confirm your registration, revise your registration information, change your password or PIN and recover a lost or forgotten PIN.

**Select "Application" from the center screen or the left-hand navigation area**

e-services Privacy Policy

Local intranet

Start | Inbox - Microsoft Outlook | Customer-facing regi... | cover.doc - Microsoft Word | 9:20 AM


Customer-facing registry content - Microsoft Internet Explorer
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Address https://la.www4.irs.gov/PORTAL-PROD/psp/CRM/CUSTOMER/CRM/s/WEBLIB_IRS_NAV.ISCRIPT1.FieldFormula.IScript_RUP_PRODUCT_PAGELET?Folder=APPLICA
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services
Application
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 either to create a new Application or to revise an existing one.
New TIN Matching Application
Payers may apply for Taxpayer Identi umber (TIN) Matching, an on-line product which allows you to submit TIN/Name combinations against IRS records.
Preparer Tax ID Number (PTIN)
The Preparer Tax Identification Nu r by paper with the Form W-7P. The PTIN Applica allow them to use this number as an alternative urns for their clients. Applications for PTIN can number on-line.
Select "e-file Application" from the center screen or the left-hand navigation area
e-services Privacy Policy
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Start Inbox - Microsoft Outlook Customer-facing regi... Microsoft PowerPoint - [...
9:21 AM

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## 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

**Select "New Application"**

Close Office

Cancel

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e-File Application - Microsoft Internet Explorer

File Edit View Favorites Tools Help

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Address https://la.www4.irs.gov/PORTAL-PROD/psp/CRM/CUSTOMER/CRM/c/APP_MENU_IRS.APP_EFILECREAT_IRS.GBL Go Links

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## 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 "Application to participate in the IRS e-file Program". This is the Form 8633 on-line application process. The application process will ask you for information regarding your Firm/Organization and personal information including Social Security Number, Date of Birth, U.S. Citizenship and Home Address with regard to each of the Principals and Responsible Officials you will be adding to your application. You will also need to know the Social Security Number of all Delegated Users. **The IRS will compare the information in the "Required Fields" with information received from 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 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 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.

*Business Type (Required):

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

Association
Corporation
Credit Union
Federal Government Agency
Limited Liability Company
Limited Liability Partnership
Local Government Agency
Partnership
Personal Service Corporation
Sole-Proprietorship

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

- Select *Next* to go to the Firm/Organization Information page.
- Select *Cancel* to exit the application and return to application menu page

Next Cancel

**Select "Corporation" as your firm/ organization BUSINESS TYPE**

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Done Local intranet

Start | Inbox - Microsoft Outlook | e-File Application - Mi... | Microsoft PowerPoint - [... | 9:22 AM

e-File Application - Microsoft Internet Explorer

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## 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 "Application to participate in the IRS e-file Program". This is the Form 8633 on-line application process. The application process will ask you for information regarding your Firm/Organization and personal information including Social Security Number, Date of Birth, U.S. Citizenship and Home Address with regard to each of the Principals and Responsible Officials you will be adding to your application. You will also need to know the Social Security Number of all Delegated Users. **The IRS will compare the information in the "Required Fields" with information received from 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 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 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.

*Business Type (Required): Corporation

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

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

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

Next Cancel

e-services Privacy Policy

**Selecting "Corporation" as your firm/organization BUSINESS TYPE automatically defaults the question on EIN to "YES"**

**Click "Next".**

Done

Start | Inbox - Microsoft Outlook | e-File Application - Mi... | Microsoft PowerPoint - [... | 9:23 AM

e-File Application - Microsoft Internet Explorer

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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): Principal

Principal
Responsible Official

*Firm/Organization Legal Name (Required):

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

*Employer Identification Number(EIN)(Required):

**Select "RESPONSIBLE OFFICIAL" from the drop down menu (NOT PRINCIPAL!!!)**

### 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.

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Done Local intranet

Start | Inbox - Microsoft Outlook | e-File Application - Mi... | Microsoft PowerPoint - [... 9:23 AM

e-File Application - Microsoft Internet Explorer

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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 shown on the firm's

If, for the purpose of IRS e-file, you c name, include the DBA name

Please select the appropriate role a

**Microsoft Internet Explorer**

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.

OK

*Firm/Organization Role(Required): Responsible Official

*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.

e-services Privacy Policy

Done

Start | Inbox - Microsoft Outlook | e-File Application - Mi... | Microsoft PowerPoint - [... | 9:24 AM

**This message box reminds you that "for profit" *e-file* providers must have a Principal. As a large corporation, you are *e-filing* your corporate return in a "Not For Profit" mode! Select "OK" to continue input on this screen.**

e-File Application - Microsoft Internet Explorer

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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): Responsible Official

*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.

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**Input your "Legal Name", "Doing Business As" (if different than Legal Name) and EIN. Select "Next"**

Local intranet

Start | Inbox - Microsoft Outlook | e-File Application - Mi... | Microsoft PowerPoint - [... | 9:29 AM

# What if my corporation's legal name and EIN do not match IRS records?

We have received many questions from corporations concerned about the IRS' "name control", that is, a correct match for your corporation's legal name and your Employer Identification Number (EIN) to what IRS has in it's records. If you are certain that you entered your corporation's information correctly (i.e., you didn't make any "typos") and you receive the message on the next screen, you will need to check with your on-site IRS employees (or call the IRS' e-Help Desk toll-free at 1-866-255-0654) to verify your correct name/EIN combination.

e-File Application - Microsoft Internet Explorer

File Edit View Favorites Tools Help

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Address https://la.www4.irs.gov/PORTAL-PROD/psp/CRM/CUSTOMER/CRM/c/APP_MENU_IRS.APP_EFILECREAT_IRS.GBL Go Links

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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(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): Responsible Official

*Firm/Organization Legal Name (Required):

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

*Employer Identification Number(EIN)(Required):

Microsoft Internet Explorer

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

**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 and return to application menu page.

Previous Next Cancel

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**If you receive this message box, your corporation's legal name and EIN does not match IRS records. Contact your on-site IRS representatives or call the IRS e-Help Desk at 1-866-255-0654.**

Done

Start | Inbox - Microsoft Outlook | e-File Application - Mi... | Microsoft PowerPoint - [... | 9:30 AM

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## e-file Application : Firm/Organization Address

Name: Your Corporation's name will appear here

Employer Identification Number(EIN): Your EIN

Please enter the address of the physical location of the firm. A Post Office (P.O.) box will not be accepted as the location of your firm. You may also enter an alternate Mailing Address **if different** than your Physical Address. You may include a P.O. box on your Mailing Address if applicable. The 'Required' fields must be completed if you are entering a different Mailing Address. You must provide a **year-round** mailing address.

**Physical Address (Required)**

*Country (Required): United States

*Address 1 (Required): Input your address -- NO P.O. BOXES ALLOWED!

Address 2:

Address 3:

*City (Required):

*State (Required):

*Postal (Required):

**Business Phone & Fax Number**

*Country Code (Required): 001

*Telephone (Required):

Fax Country Code:

Fax Number:

Is your mailing address different than your physical address? ○ Yes ◉ No

If yes, provide a mailing address

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**Input your corporation's address, city, state, zip code, country code, telephone number, and fax number.**

**Note that NO Post Office (P.O.) Boxes can be used as an address.**

**The Country Code for the United States is 001 (the default)**

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Address 2:
Address 3:
*City (Required): LANHAM
*State (Required): Maryland
*Postal (Required): 20706

**Business Phone & Fax Number**

*Country Code (Required): 001
*Telephone (Required): Area Code/123-1234
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.

e-file Application Menu Page

**When you have finished Firm/Organization Address, you may do any of the following:**

- Select *Previous* to go back to the Main page.
- Select *Next* to go to the Application Contact(s) page.
- Select *Save* to save all changes made.
- Select *Cancel* to exit the application and return to the application menu page.

Previous | Next | Save | Cancel

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**If your mailing address is different than your physical address, you will get another address screen to complete!**

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## e-file Application : Application Contact(s)

Name: Employer Identification Number(EIN):

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): 001
*Phone Number (Required): Area Code/123-1234 Extension:
Fax Country Code:
Fax Number:
Email Address:

**Alternate Contact**

*First Name (Required):
Middle Initial:
*Last Name (Required):

**Your e-file Application Contact and Alternate Contact must be individuals in your corporation that can answer questions regarding your Application AND any e-file processing issues encountered during the year. Your Application Contact and Alternate Contact can also be designated as your Responsible Official(s) or Delegated User(s)!**

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**Alternate Contact**

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

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

Add | Clear

**After completing the fields, click "Add" and a table will appear with your contacts.**

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

- Select *Edit* to edit an alternate contact. The editable entries will appear in the section above.
- Select *Delete* to delete an alternate contact.

| Salutation | Name | Title | Telephone | Ext | Fax | Email Address | Edit | |
|---|---|---|---|---|---|---|---|---|
| | | | | | | | Edit | Delete |

e-file Application Menu Page

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

- Select *Previous* to go back to the Main page.

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When you successfully complete your e-file Application, IRS will mail an acceptance letter to the your Application Contact welcoming you to the *e-file* Program. The acceptance letter will be sent to the mailing address you provide when you create your *e-file* Application.

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

Name: Employer Identification Number (EIN):

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.

**Business Activity**

*Provider Option (Required):

*For Profit or Not For Profit Business Activity (Required):

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

Add | Clear

Electronic Return Originator
Intermediate Service Provider
Large Taxpayer
Online Filer
Reporting Agent
Software Developer
Transmitter

**Select "Large Taxpayer" from the drop down menu.**

**When you have finished Program(s) Applying For, you may do any of the following:**

- Select *Previous* to go back to the Application Contact(s) page.
- Select *Next* to go to the Responsible Official(s) page.
- Select *Save* to save all changes made.
- Select *Cancel* to exit the application and return to the application menu page.

Previous | Next | Save | Cancel

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

**Name:** LINDA ANDREWS INCORPORATED

**Employer Identification Number(EIN):** 20-4037991

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 acti
*Add* button as needed.

**Business Activity**

*Provider Option (Required): Large Taxpayer

*For Profit or Not For Profit Business Activity (Required): Not For Profit

*Type of Business Activity:

- Employee Benefit Program
- Military Base
- Tax Assistance Center
- Tax Counseling for Elderly
- Volunteer Income Tax Assist

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

Add | Clear

**When you have finished Program(s) Applying For, you may do any of the following:**

- Select *Previous* to go back to the Application Contact(s) page.
- Select *Next* to go to the Responsible Official(s) page.
- Select *Save* to save all changes made.
- Select *Cancel* to exit the application and return to the application menu page.

Previous | Next | Save | Cancel

e-services Privacy Policy

**Selecting "Large Taxpayer" as your Provider Option will default the next field to "Not For Profit". This DOES NOT mean that your corporation is Not For Profit – it means you are *e-filing* your corporate return in a Not For Profit mode. Not For Profit means you are originating and/or transmitting your own return and do not originate or transmit for profit for other taxpayers.**

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

**Name:** LINDA ANDREWS INCORPORATED **Employer Identification Number(EIN):** 20-4037991

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.

**Business Activity**

*Provider Option (Required): Large Taxpayer

*For Profit or Not For Profit Business Activity (Required): Not For Profit

*Type of Business Activity:

- Employee Benefit Program
- Military Base
- Tax Assistance Center
- Tax Counseling for Elderly
- Volunteer Income Tax Assist

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

Add | Clear

**When you have finished Program(s) Applying For, you may do any of the followi**

- Select ***Previous*** to go back to the Application Contact(s) page.
- Select ***Next*** to go to the Responsible Official(s) page.
- Select ***Save*** to save all changes made.
- Select ***Cancel*** to exit the application and return to the application menu page.

Previous | Next | Save | Cancel

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**Select "Employee Benefit Program" as the "Type of Business Activity". All these fields identify you as a large corporation *e-filing* your own return – as such, you are not subject to suitability checks!**

**Click add to create a table with your corporation's Provider Options.**

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

**Name:** LINDA ANDREWS INCORPORATED **Employer Identification Number(EIN):** 20-4037991

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.

**Business Activity**

*Provi

*For Profit or Not For Profit Busines

*Type

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

Add | Clear

**Microsoft Internet Explorer**

As a large taxpayer, you will prepare and transmit your own return(s). (25000,23)

If your business has assets of more than $10 million or if you are a partnership with 100+ partners and you will prepare and transmit your own return(s).

OK

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

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

| Provider Option | For Profit | Business Activity | Status | Edit | |
|---|---|---|---|---|---|
| Large Taxpayer | Not For Profit | Employee Benefit Program | Applied | Edit | De |

**When you have finished Program(s) Applying For, you may do any of the following:**

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**This is just a reminder that, as a Large Taxpayer, you will prepare and transmit your own return. Click "OK" even if you are using a third-party preparer and/or transmitter!**

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**Business Activity**

*Provider Option (Required): Large Taxpayer
*For Profit or Not For Profit Business Activity (Required): Not For Profit
*Type of Business Activity: Employee Benefit Program

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

Add | Clear

**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 above.)
- Select *Delete* to delete a provider option.

| Provider Option | For Profit | Business Activity | Status | Edit | |
|---|---|---|---|---|---|
| Electronic Return Originator | For Profit | | Accepted | Edit | Delete |
| Large Taxpayer | Not For Profit | Employee Benefit Program | Accepted | Edit | Delete |
| Software Developer | For Profit | | Accepted | Edit | Delete |
| Transmitter | For Profit | | Accepted | Edit | Delete |

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

e-file Application Menu Page

**When you have finished Program(s) Applying For, you may do any of the following:**

- Select *Previous* to go back to the Main page.
- Select *Next* to go to the Form(s) page

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The Provider Option table showing "Large Taxpayer", "Not For Profit" and "Employee Benefit Program"

Now click "Next" to go to the next screen.

e-File Application - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Search Favorites

Address https://la.www4.irs.gov/PORTAL-PROD/psp/CRM/CUSTOMER/CRM/c/APP_MENU_IRS.APP_EFILECREAT_IRS.GBL Go Links

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## e-file Application : Form(s)

Name: Employer Identification Number(EIN):

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): Large Taxpayer

*For Profit (Required): Not For Profit

*Return/Form Type (Required):

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

Add Clear

1065 - U.S. Return of Partnership Income
1120 - U.S. Corporation Income Tax Return
1120POL - U. S. Income Tax Return for Certain Political Organ
940 - Employer's Annual Federal Unemployment (FUTA)
941 - Employer's Quarterly Federal Tax Return
990 - Return of Organization Exempt From Income Tax

**Select "Large Taxpayer" as your Provider Option.**

**Then select the form type you will be *e-filing* for your corporation.**

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

- Select *Edit* to edit e-File form entries. (The editable entries will appear in the section above.)
- Select *Delete* to delete an e-File form.

| Provider Option | For Profit | Form | States | Transmission Method - Status | Edit |
|---|---|---|---|---|---|

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Done Local intranet

Start | Inbox - Microsoft Outlook | e-File Application - Mi... | Microsoft PowerPoint - [... | untitled - Paint | 9:46 AM

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**e-file Application : Form(s)**

Name: LINDA ANDREWS INCORPORATED

Employer Identification Number(EIN): 20-4037991

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): Large Taxpayer

*For Profit (Required): Not For Profit

*Return/Form Type (Required): 1120 - U.S. Corporation Income Tax Return

*Transmission Method/Format ( One or More Required):

| | Description |
|---|---|
| ☐ | Dial-up/Direct |
| ☐ | Internet |

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

Add | Clear

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

- Select *Previous* to go back to the Program(s) Applying For page.
- Select *Next* to go to the Responsible Official(s) page.
- Select *Save* to save all changes made.
- Select *Cancel* to exit the application and return to the application menu page.

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**Select "Internet" to *e-file* large corporate returns via MeF Internet Filing Application (IFA)**

**NOTE: Application-to-Application (A2A) is not shown as a selection on the *e-file* Application at present! See Publication 4164 for instructions – A2A requires a separate system enrollment!**

**Click "Add" after all fields are selected!**

**Note: Even if you are using a third-party transmitter, you need to select "Internet"!**

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## e-file Application : Form(s)

Name: Employer Identification Number (EIN):

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): Large Taxpayer
*For Profit (Required): Not For Profit
*Return/Form Type (Required):

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

Add Clear

**Table showing the "Large Taxpayer" Provider Option, *e-filing* the Form 1120 in a not-for-profit mode via the "Internet – Test" Transmission Method**

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

- Select *Edit* to edit e-File form entries. (The editable entries will appear in the section above.)
- Select *Delete* to delete an e-File form.

| Provider Option | For Profit | Form | States | Transmission Method - Status | Edit | |
|---|---|---|---|---|---|---|
| Large Taxpayer | Not For Profit | 1120 | Not Applicable | Internet - Test | Edit | Delete |

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

- Select *Previous* to go back to the Program(s) Applying For page.
- Select *Next* to go to the Responsible Official(s) page.
- Select *Save* to save all changes made.

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# 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 *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 [for a total of five]. 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 have attained the age of 21 as of the date of the application

***Note: The Responsible Official is not required to be a Corporate Officer or a Principal of the Firm!***

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

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## e-file Application : Responsible Official(s)

Name: Employer Identification Number(EIN):

The responsible official is the individual with responsibility for 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.

*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:

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

Add Clear

**Complete the input fields to designate your Responsible Official(s). Your Responsible Official DOES NOT have to be a Principal or Corporate Officer of your corporation!!**

**Click "Add" to create a table of your Responsible Officials.**

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

- Select *Authorities* to go to Responsible Official authorities page.
- Select *Edit* to edit responsible official entries. (The editable entries will appear in the section above.)

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*Position Title (Required):
*U.S. Citizen (Required):
*Social Security Number (Required):
*Date of Birth (Required):
Email Address:

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

Add | Clear

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

- Select *Authorities* to go to Responsible Official authorities page.
- Select *Edit* to edit responsible official entries. (The editable entries will appear in the section above.)

Personal Information

| Name | TIN | Organization Role | Title | Authorities | Edit | |
|---|---|---|---|---|---|---|
| | | Responsible Official | RO | Authorities | Edit | Delete |

e-file Application Menu Page

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

- Select *Previous* to go back to the Principal(s) page.
- Select *Next* to go to the Delegated User(s) page.
- Select *Save* to save all changes made.
- Select *Cancel* to exit the application and return to the application menu page.

Previous | Next | Save | Cancel

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**Continue to complete the input fields and click "Add" to create your table of Responsible Officials. You can have up to five (5) on your Application -- it is a good idea to have at least two Responsible Officials to serve as back up to each other!**

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*Position Title (Required):
*U.S. Citizen (Required):
*Social Security Number (Required):
*Date of Birth (Required):
Email Address:

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

Add | Clear

**Click on the "Authorities" link for each Responsible Official to delegate their individual permissions.**

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

- Select *Authorities* to go to Responsible Official authorities page.
- Select *Edit* to edit responsible official entries. (The editable entries will appear in the section above.)

Personal Information

| Name | TIN | Organization Role | Title | Authorities | Edit | |
|---|---|---|---|---|---|---|
| | | Responsible Official | RO | Authorities | Edit | Delete |

e-file Application Menu Page

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

- Select *Previous* to go back to the Main page.
- Select *Next* to go to the Delegated User(s) page.
- Select *Save* to save all changes made.
- Select *Cancel* to exit the application and return to the application menu page.

Previous | Next | Save | Cancel

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## 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.

**Andrews,Linda L**

**Please select one or more of the following...**

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

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

- Select *OK* to apply all changes and return to .
- Select *Cancel* to discard all changes and return to the page.

OK | Cancel

**Responsible Officials are automatically assigned each of these four permissions. You must deselect the box on any activity you do not want a Responsible Official to have!**

**Click "OK" when you are finished.**

**Note: Instructions on designating a Responsible Official as your corporation's "Internet Transmitter" will be shown later.**

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*Position Title (Required):
*U.S. Citizen (Required):
*Social Security Number (Required):
*Date of Birth (Required):
Email Address:

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

Add | Clear

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

- Select *Authorities* to go to Responsible Official authorities page.
- Select *Edit* to edit responsible official entries. (The editable entries will appear in the section above.)

**Personal Information**

| Name | TIN | Organization Role | Title | Authorities | Edit | |
|---|---|---|---|---|---|---|
| | | Responsible Official | RO | Authorities | Edit | Delete |

e-file Application Menu Page

**When you have finished Responsible Official(s), you may do any of th**

- Select *Previous* to go back to the Main page.
- Select *Next* to go to the Delegated User(s) page.
- Select *Save* to save all changes made.
- Select *Cancel* to exit the application and return to the

Previous | Next | Save | Cancel

**Click "Next" to designate your Delegated Users.**

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## e-file Application : Firm/Organization Suitability Information

Name: Employer Identification Number(EIN):

### Suitability Questions

Please answer the following "suitability" questions on behalf of the Firm/Organization and enter explanation in **Comments** field f "Yes" responses. Misrepresentation when answering these questions will result in the rejection of your application to participate i IRS e-file Program. If your application is denied, you will be able to apply again for participation two years from the date of the denia letter.

| Has your Firm/Organization... | *Answer | Comments |
|---|---|---|
| been assessed any preparer penalties? | No | |
| ever been convicted of a crime? If "Yes", state the offense which resulted in the conviction. | No | |
| failed to file personal or business tax returns, or pay your tax libilities? | No | |
| been convicted of any criminal offense under the U.S. Internal Revenue laws? | No | |

e-file Application Menu Page

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

- Select ***Previous*** to go back to the EFIN Status page.
- Select ***Next*** to go to the Principal(s) page.
- Select ***Save*** to save all changes made.
- Select ***Cancel*** to exit the application and return to the application menu page.

Previous | Next | Save | Cancel

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**NOTE!!**
**If you get this screen, do not complete it – click "Next".**

**Suitability checks are not required for Large Taxpayers!**

# What is a Delegated User?

A **Delegated User** is an individual within your firm/organization, other than a Responsible Official, who is an employee, partner, or other member of the firm/organization or who has a business relationship with the firm/organization and whom you want to perform activities for your organization.

The information you will need for each Delegated Users you want to add to your corporation's e-file Application includes: Name, Social Security Number, Title, and e-mail Address.

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

Name: 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.

Add Clear

**As with the Responsible Official screens, complete the information, click "Add" and create a table of your Delegated User(s).**

**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 above.)
- Select *Delete* to delete a delegated user.

| Name | SSN | Organization Role | Title | Delegate Authorities | Edit | |
|---|---|---|---|---|---|---|

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Name Suffix:
Title:
*Social Security Number (Required):
Email Address:

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

Add | Clear

**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 above.)
- Select *Delete* to delete a delegated user.

| Name | SSN | Organization Role | Title | Delegate Authorities | Edit | |
|---|---|---|---|---|---|---|
| | | Delegated User | Program Analyst | Delegate Authorities | Edit | Delete |

e-file Application Menu Page

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

- Select *Previous* to go back to the Responsible Official(s) page.
- Select *Next* to go to the Application Status page.
- Select *Save* to save all changes made.
- Select *Cancel* to exit the application and return to the application menu page.

Previous | Next | Save | Cancel

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

DOE, JOHN J.

**Please select one or more of the following...**

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

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

- Select *OK* to apply all changes and return to .
- Select *Cancel* to discard all changes and return to the page.

OK | Cancel

**Unlike Responsible Officials, Delegated Users are not automatically assigned each of these four permissions. You must click on the box on any activity you want your Delegated User to have!**

**Click "OK" when you are finished.**

**Note: Instructions on designating a Delegated User as your corporation's "Internet Transmitter" will be shown later.**

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## e-file Application : Application Status

Name: 

Employer Identification Number(EIN): 

| Begin Date/Time | Application Status |
|---|---|
| 12/20/2005 12:20:22AM | Completed |
| 12/20/2005 12:15:59AM | Submitted Revised |
| 12/19/2005 11:38:47AM | Submitted Pending Documents |
| 12/15/2005 12:20:13AM | Completed |
| 12/15/2005 12:15:47AM | Submitted Revised |
| 12/14/2005 8:21:02AM | Submitted Pending Documents |
| 05/04/2005 12:17:04AM | Completed |
| 05/03/2005 2:45:38PM | Submitted Revised |
| 03/21/2005 12:22:15AM | Completed |
| 03/17/2005 1:59:52PM | Submitted Revised |
| 02/23/2005 12:17:43AM | Completed |
| 02/22/2005 1:55:48PM | Submitted New |
| 02/18/2005 11:10:40AM | Saved |
| 01/25/2005 4:17:49PM | Deleted |
| 01/24/2005 2:06:25PM | Saved |

**Application Status shows activity on your e-file Application, with the time and date of that activity. This is for your information.**

e-file Application Menu Page

**When you have finished Application Status, you may:**

- Select ***Previous*** to go back to the Delegated User(s) page.
- Select ***Next*** to go to Service(s) Authorized For.
- Select ***Cancel*** to exit the application and return to application menu page.

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**It is important that Responsible Officials and/or Delegated Users and their authorities be deleted from the IRS *e-file* Application when they are no longer associated with the Large Taxpayer or when their position within the firm no longer warrants one or more authorities.**

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## e-file Application: Application Submission & Completion

Name: Employer Identification Number(EIN):

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.

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.

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

*PIN (Required):

e-file Application Menu Page

**When you have finished Application Submission, you may do any of the follow**

- Select ***Previous*** to go back to the Personal Information page.
- Select ***Submit*** to submit this application.
- Select ***Cancel*** to exit the application and return to the application menu page.

Previous | Submit | Cancel

**When you are ready to submit your e-file Application, you must sign it with your 5-digit PIN you established when you registered!**

**Click "Submit".**

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e-File Application - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Search Favorites

Address https://la.www4.irs.gov/PORTAL-PROD/psp/CRM/CUSTOMER/CRM/c/APP_MENU_IRS.APP_EFILECREAT_IRS.GBL Go Links

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Saved

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.

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 al

Microsoft Internet Explorer

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

OK

Please enter your PIN to accept the terms for this application. You have selected when you registered.

*PIN (Required):

e-file Application Menu Page

When you have finished Application Submi

- Select *Previous* to go back to the Personal Information page.
- Select *Submit* to submit this application.
- Select *Cancel* to exit the application and return to the application menu page.

Previous Submit Cancel

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Done

Start | Inbox - Microsoft Outlook | Deloitte and Touche Jan... | BMF_1120_1120s_

**You cannot advance to the next screen if you have left any required field left blank! The field will be displayed as shown with a message stating that "None of the following fields can be empty:"**

**In this case, you would enter your PIN and click "Submit".**

**Overnight, IRS will check your e-file Application and assign you an EFIN (Electronic Filing Identification Number) and an ETIN (Electronic Transmitter Identification Number). *You will not be able to change/modify your e-file Application until this check is completed*!**

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**e-file Application: Submission Complete**

**Name:** Your corporation's name will appear here

**Employer Identification Number(EIN):** Your corporation's EIN will appear here

Thank you for submitting your application to the IRS. In order for your application to be processed, you must forward your Finger Print Card(s) or Proof of Professional Status to the Andover Submission Processing Center, Andover MA, 05501.

Please include with your fingerprint cards or proof of professional status, your application tracking number shown below. Please print this page or notate this number for future reference.

For additional information regarding Finger Print Cards or Proof of Professional Status, please click this link. To Become an Authorized IRS e-file Provider.

If you have any questions, please call the e~help desk at 1-866-255-0654.

**200412** Your 20-digit tracking number will appear here...it is a good idea to record this number if there are any issues with your e-file Application (you can also just print this page for your records)

OK

**Record your 20-digit tracking number in case you have any questions about your *e-file* Application and need to call the e-Help Desk (1-866-255-0654). They can research your Application using this tracking number.**

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IRS Home > e-services > Select Organization

## Select 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. You will be able to perform work for only that organization.

- (selected) **Individual**
- DOE TAX CONSULTANTS, 1000 MAIN STREET, ANYWHERE, USA 11111

Submit Selected Organization

**Once you are associated with an e-file Application, you will select that organization to view/modify your corporation's Application.**

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## e-file Application

Name: Employer Identification Number(EIN):

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:

- Add New Location
- Firm Name & Business Type
- Firm/Organization Address
- Application Contact(s)
- Program(s) Applying For
- Form(s)
- ETIN Status
- EFIN Status
- Firm Suitability Information
- Principal(s)
- Responsible Official(s)
- Delegated User(s)
- Application Status
- Service(s) Authorized For
- Personal Information
- Application Submission
- Firm Disassociation

**This is the *e-file* Application Menu that allows you to go directly to that area of your *e-file* Application.**

**Click on any of the links to view/modify that area of your *e-file* Application.**

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

- Select ***Previous*** to go back to the Application Status page.
- Select ***Save*** to save all changes made.
- Select ***Cancel*** to exit the application and return to the application menu page.

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*Position Title (Required):
*U.S. Citizen (Required):
*Social Security Number (Required):
*Date of Birth (Required):
Email Address:

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

Add | Clear

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

- Select *Authorities* to go to Responsible Official authorities page.
- Select *Edit* to edit responsible official entries. (The editable entries will appear in the section above.)

Personal Information

| Name | TIN | Organization Role |
|---|---|---|
| | | Responsible Officia |

e-file Application Menu Page

**When you have finished Respon**

- Select *Previous* to go back to the Main page.
- Select *Next* to go to the Delegated User(s) page.
- Select *Save* to save all changes made.
- Select *Cancel* to exit the application and return to the application menu page.

Previous | Next | Save | Cancel

**This link is available on every screen to navigate back to the main e-file Application menu. Note: Sometimes the link is very light but it will still work!**

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e-File Application - Microsoft Internet Explorer

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## e-file Application : EFIN Status

Name: Employer Identification Number(EIN):

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

| | EFIN | EFIN Status | Begin Date/Time |
|---|---|---|---|
| 1 | 6-digit EFIN | Valid/Active | 02/22/2005 1:58:10PM |

e-file Application Menu Page

**When you have finished EFIN Status, you may:**

- Select *Previous* to go back to the ETIN Status page.
- Select *Next* to go to Firm Suitability Information.
- Select *Cancel* to exit the application and return to applicati

Previous Next Cancel

**This table will have your 6-digit EFIN. An EFIN is your corporation's approval to e-file with the IRS.**

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## e-file Application : ETIN Status

Name: Employer Identification Number(EIN):

### Electronic Transmitter Identification Number(s)

Customize | Find | First 1-3 of 3 Last

| | For Profit | Provider Option | ETIN | ETIN Type | Status | Begin Date/Time | Acknowledge Date | New Password |
|---|---|---|---|---|---|---|---|---|
| 1 | Not For Profit | Large Taxpayer | | Production | Inactive | 10/23/2005 9:56:11AM | | |
| 2 | For Profit | Software Developer | | Test | Active | 10/23/2005 9:54:25AM | | New Password |
| 3 | For Profit | Transmitter | | Production | Active | 10/23/2005 9:53:53AM | | New Password |

e-file Application Menu Page

**When you have finished ETIN Status, you may:**

- Select *Previous* to go back to the Main page.
- Select *Next* to go to EFIN Status.
- Select *Cancel* to exit the application and return to appli

Previous Next Cancel

**This table will have your 5-digit ETIN for the Form you will be filing. The ETIN is your corporation's approval to transmit your return to IRS.**

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  - EAR Reports
  - Maintenance
  - Transcript Delivery System
- Customers CRM
- Application Diagnostics
- PeopleTools
- 360-Degree View

## 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...

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

When you have finished your edi

- Select *OK* to apply all changes and return to
- Select *Cancel* to discard all changes and return to

OK Cancel

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Start | Microsoft PowerPoint - [... | Inbox - Microsoft Outlook | Application Screens.doc ... | Search e-file Applicati... | 4:09 PM

**Once your ETIN has been assigned, you must designate your Internet Transmitter – this can be a Responsible Official, a Delegated User or both.**

**Select "Responsible Officials" or "Delegated Users" from your e-file main menu. Click on the "Authorities" link for the person you want to designate as your Internet Transmitter.**

**Click "OK" when completed.**

Search e-file Application - Microsoft Internet Explorer

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  - EAR Reports
  - Maintenance
  - Transcript Delivery System
- Customers CRM
- Application Diagnostics
- PeopleTools
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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.

**Stevens,Craig**

**Please select one or more of the following...**

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

**(Delegate Authorities page)**

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

- Select *OK* to apply all changes and return to .
- Select *Cancel* to discard all changes and return to the page.

OK Cancel

**Note: The "Security Manager" authority will be removed as a selection in the near future. It is not a category for Large Taxpayers!!**

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Saved

Add Clear

**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. (Th
- Select *Delete* to delete a delegated user.

| Name | SSN |
|---|---|
| | |

Microsoft Internet Explorer

You must re-submit the application for the IRS to review the application. (25000,166)

OK

Authorities

e-file Application Menu Page

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

- Select *Previous* to go back to the Main page.
- Select *Next* to go to the Application Status page.
- Select *Save* to save all changes made.
- Select *Cancel* to exit the application and return to the application menu

Previous Next Save Cancel

**Any time you make changes to your *e-file* Application, you must "Save" and "Submit" the Application to process those changes!**

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## e-file Application: Application Submission & Completion

Name: Employer Identification Number(EIN):

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.

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.

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

*PIN (Required):

**Sign with your 5-digit PIN and click "Submit" to process the changes or modifications to your *e-file* Application!**

e-file Application Menu Page

**When you have finished Application Submission,**

- Select ***Previous*** to go back to the Personal Information page
- Select ***Submit*** to submit this application.
- Select ***Cancel*** to exit the application and return to the application menu page.

Previous | Submit | Cancel

e-services Privacy Policy

# What about changes to my *e-file* Application?

- If there are any changes that would affect your corporation's 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. EFINs, logins and/or passwords may **not** be sold or transferred.
- You must adhere to all applicable IRS *e-file* rules and requirements regardless of where published. The list below, while not all-inclusive, applies to Large Taxpayers:
  - Ensure against the unauthorized use of its EFIN and/or ETIN;
  - Notify the IRS of changes as described in this document in a timely manner; and
  - Cooperate with the IRS' efforts to monitor electronic filing fraud and abuse.

# *e-file* Application Summary

- Identify your Business Type as Corporation
- Identify your Firm/Organization Role as Responsible Official
- Identify your office locations
- Designate Application Contacts, Responsible Officials and Designated Users
- Identify your Provider Option as Large Taxpayer
- Identify your Business Activity as Employee Benefit Program
- Identify the forms you will file
- Identify the transmission channel you will use (even if you are using a third-party transmitter)
- After the IRS check, record your EFIN and ETIN and identify who will serve as your Internet Transmitter
- Electronically sign your *e-file* Application every time you make changes to it!

***The IRS e-Help Desk can assist you with any questions on the e-Services' e-file Application Process.***

# ***1-866-255-0654***