

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](https://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?

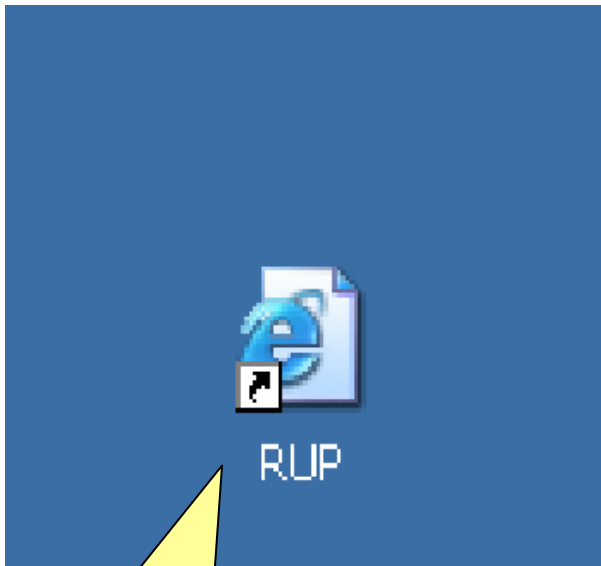
- Provides authorization to *e-file* your corporation's return
 - Electronic Filing Identification Number (**EFIN**)
 - Electronic Transmitter Identification Number (**ETIN**)
- Establishes the form type (1120/1120S) you will file with IRS
- Establishes the transmission channel for your return

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



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[IRS Home](#) > [Tax Professionals](#) > [Login](#)

Login

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

Username
Password

[Not registered? Register here](#)

FORGOT YOUR PASSWORD?

If your password is not working for some reason, [click here](#) to get a new one. You will need your username, name, and the original registration.

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

I Accept

I Do Not Accept


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Customer-facing registry content - Microsoft Internet Explorer

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 **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 PIN.

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

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Local intranet

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

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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 it either to create a new Application or to revise an existing one.

[New TIN Matching Application](#)

Payers may apply for Taxpayer Identification Number (TIN) Matching, an on-line product which allows you to submit TIN/Name combinations to be checked against IRS records.

[Preparer Tax ID Number \(PTIN\)](#)

The Preparer Tax Identification Number (PTIN) is required for preparers who file tax returns for others by paper with the Form W-7P. The PTIN Application allows preparers to apply for a PTIN on-line. The PTIN Application allows preparers to use this number as an alternative to their Social Security Number (SSN) for their clients. Applications for PTIN can be submitted on-line.

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

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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

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):'

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

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

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

Select "Corporation" as your firm/organization BUSINESS TYPE

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e-file Application: Firm/Organization Business Type

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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

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

Click "Next".

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):

*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.

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 name, include the DBA name

Please select the appropriate role a

***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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Done

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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


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):

'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"

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 its 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

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

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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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Done

Start | Inbox - Microsoft Outlook | e-File Application - Mi... | Microsoft PowerPoint - [...]

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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.



e-file Application : Firm/Organization Address

Name:

Employer Identification Number(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):

*Address 1 (Required):

Address 2:

Address 3:

*City (Required):

*State (Required):

*Postal (Required):

Business Phone & Fax Number

*Country Code (Required):

*Telephone (Required):

Fax Country Code:

Fax Number:

Is your mailing address different than your physical address?

Yes No

If yes, provide a mailing address

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)

Address 2:

Address 3:

*City (Required):

*State (Required):

*Postal (Required):

Business Phone & Fax Number

*Country Code (Required):

*Telephone (Required):

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.

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

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):

'Phone Number (Required): Area Code/1 23-1234 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)!

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.

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	
	<input type="text"/>		<input type="text"/>				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.

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.

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.



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. Use 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.

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.

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.



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):

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

*Type of Business Activity:

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

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.

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.



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

For Profit or Not For Profit Business


Type

- Select **Add** to add a provider option.
- 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	Delete
Large Taxpayer	Not For Profit	Employee Benefit Program	Applied	Edit	Delete

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

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!

Business Activity

*Provider Option (Required):

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

*Type of Business Activity:

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

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	Delete
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

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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

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 : 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.

1065 - U.S. Return of Partnership Income
1120 - U.S. Corporation Income Tax Return
1120POL - U. S. Income Tax Return for Certain Political Organi...
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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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):

'For Profit (Required):

'Return/Form Type (Required):

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

Description
<input type="checkbox"/> Dial-up/Direct
<input type="checkbox"/> Internet

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

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"!

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.



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):

'For Profit (Required):

'Return/Form Type (Required):

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

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.

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.

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.

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.)

'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.

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!

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	
<input type="text"/>	<input type="text"/>	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.

'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.

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	
<input type="text"/>	<input type="text"/>	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.



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.

Internal Revenue Service

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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.

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	
<input type="text"/>	<input type="text"/>	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 Main page.

Click "Next" to designate your Delegated Users.



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 for "Yes" responses. Misrepresentation when answering these questions will result in the rejection of your application to participate in the 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 denial letter.

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

NOTE!!

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

Suitability checks are not required for Large Taxpayers!

[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.

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.

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:

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
------	-----	-------------------	-------	----------------------	------



Name Suffix:

Title:

*Social Security Number (Required):

Email Address:

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

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

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	
<input type="text"/>	<input type="text"/>	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.



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...

- 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

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.

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.



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.



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 following:

- 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".

e-File Application - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Refresh Mail Print Mailbox People

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

Internal Revenue Service

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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. Saved

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 a

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

*PIN (Required):

Microsoft Internet Explorer

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

OK

[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

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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.



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.

Individual

DOE TAX CONSULTANTS, 1000 MAIN STREET, ANYWHERE, USA 11111

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

[Submit Selected Organization](#)

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.

'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.

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
<input type="text"/>	<input type="text"/>	Responsible Official

[e-file Application Menu Page](#)

When you have finished Responding

- 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.

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!

e-file Application : EFIN Status

Name: Employer Identification Number(EIN):

Listed below are the EFIN(s) Electronic Filing Identification 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 application

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	<input type="text"/>	Production	Inactive	10/23/2005 9:56:11AM		
2	For Profit	Software Developer	<input type="text"/>	Test	Active	10/23/2005 9:54:25AM		New Password
3	For Profit	Transmitter	<input type="text"/>	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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- Search:**
 
- My Favorites
 - e-services
 - Application
 - Disclosure Authorization
 - Efile
 - Process
 - Create New Application
 - Software Developer
 - Search e-file Application**
 - Personal Suitability
 - Electronic Account Resolution
 - 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...

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

When you have finished your edit...

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

[e-services Privacy Policy](#)

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: go
- My Favorites
 - e-services
 - Application
 - Disclosure Authorization
 - Efile
 - Process
 - Create New Application
 - Software Developer
 - Search e-file Application**
 - Personal Suitability
 - Electronic Account Resolution
 - EAR Reports
 - Maintenance
 - Transcript Delivery System
 - Customers CRM
 - Application Diagnostics
 - PeopleTools
 - 360-Degree View

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...

- View Application Information
- Update Application Information
- 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.

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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e-File Application - Microsoft Internet Explorer

File Edit View Favorites Tools Help

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

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

Name	SSN
<input type="text"/>	<input type="text"/>

[Authorities](#)

Microsoft Internet Explorer

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

OK

[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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Done Local intranet

Start Microsoft PowerPoint - [...], Inbox - Microsoft Outlook, Application Screens.doc ..., e-File Application - Mi..., 3:02 PM



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](#)

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