

IRS Form 990-N Electronic Filing System (e-Postcard) User Guide

Steps for using the Form 990-N Electronic Filing System (e-Postcard)

REMINDER

An organization cannot file Form 990-N until after the end of its tax year. For example:

• Calendar Year Filers

If your organization wishes to file Form 990-N for tax year 2016 and uses a calendar year (Jan. through Dec.) as its tax year, it must wait until January 1, 2017, to file Form 990-N.

• Fiscal Year Filers

If your organization wishes to file Form 990-N for tax year 2016 and uses a fiscal year (for example, Oct. 1, 2015 through Sept. 30, 2016) as its tax year, it must wait until Oct. 1, 2016, to file Form 990-N.

The IRS determines the filing year using the beginning date of the organization's fiscal period.

HOW TO FILE

Open the electronic filing page at <https://sa.www4.irs.gov/epostcard/>.

The screenshot shows the IRS ePostcard login page. It is divided into two main sections: "First Time Users" and "Returning Users".

First Time Users: This section includes the text "If this is the first time you are using this online service we will need to verify your identity before we proceed" and a prominent "GET STARTED" button.

Returning Users: This section includes the text "Log in below if you've previously registered through any of the following applications" and a list of applications: "Get Transcript", "Identity Protection PIN (IP PIN)", "Online Payment Agreement (OPA)", and "ePostcard". Below this list is a "Username" input field with a "Mask Username" checkbox, a "LOG IN" button, and a "Forgot Username" link.


First Time Users: Select **GET STARTED**.

Returning Users: Enter your Username and select **LOG IN**. Skip to **STEP 6** of this user guide. If you registered before February 18, 2016, you must register again as a First Time User. Your user name and password from Urban Institute will not work.

REGISTRATION: FIRST TIME USERS ONLY

STEP 1

Enter your contact information, then select **SEND EMAIL CONFIRMATION CODE**



Step 1 of 4: Personal Information

All fields are required.

First Name
.....

Last Name
.....


Email Address
.....

Re Enter Email Address
.....

A confirmation code will be sent to your email address.

STEP 2

Enter the confirmation code found in your email, then select **CONTINUE**. If you don't receive an email, check your spam or junk email folder.



Step 2 of 4: Verify Identity

Do not close this browser window or you will have to restart the process.

- A confirmation code will be sent to your email address within the next 10 minutes
- Check your spam folder if you don't receive an email.
- If you don't receive a confirmation code within 15 minutes, please select cancel and request a new code.

Enter Confirmation Code
.....

STEP 3A

Choose a **USER ID** and **PASSWORD** on the "Security Profile" page:

User ID field: Ensure that you use only letters, numbers or a hyphen. This character limit does not apply to password fields.

Password field: Ensure that you use only letters, numbers, ! or #.

STEP 3B

Choose a **SITE PHRASE**. This phrase will appear on your login page before you input your password. When you see the phrase you created while logging in, you can be assured you're not on a scam or fake page. You may use spaces within the site phrase.

STEP 3C

Choose a **SITE IMAGE**. This image will appear on your login page before you input your password. When you see your selected image while logging in, you can be assured you're not on a scam or fake page.

STEP 3D

Choose four challenge questions. These questions may appear when you logon using a new computer or location. When you have selected and answered four questions, select **CONTINUE**.

The screenshot shows a security challenge interface. At the top, it says "Select 4 questions". Below this, there are "Answer Rules" listed: "The same answer cannot be used more than once" and "The answer can not be a word or number that is part of the secret question." There are four question entries, each with a "Question" label and a dropdown arrow, and a corresponding "Answer" label with a text input field. At the bottom of the form, there are two buttons: "Cancel" and "Continue".

STEP 4

The "User Profile Successfully Created" page will appear. Select **CONTINUE**.

The screenshot shows a message box with the title "User Profile Successfully Created". The text inside says "Your profile was successfully created. Please write down your Username for future reference." Below the text is a "Continue" button with a right-pointing arrow.

STEP 5

Select **CONTINUE** on the "Online Services" page.

The screenshot shows a message box with the title "Your login history". The text inside says "For your security, we will show you your recent login activity every time you login." Below the text is a "Continue" button with a right-pointing arrow.

CREATE AN ELECTRONIC FORM SUBMISSION

STEP 6

Select **MANAGE E-POSTCARD PROFILE** to create a new Form 990-N electronic filing submission.

Electronically file your Form 990-N (e-Postcard) Home | Security Profile | Logout

e-Postcard Profile

Before you can create a Form 990-N (e-Postcard), you must create your e-Postcard Profile. Your e-Postcard Profile allows you to:

1. Designate your e-Postcard Profile as either a "Preparer" or "Exempt Organization"
2. Add EINs to your e-Postcard Profile
3. Remove EINs from your e-Postcard Profile

More information on who must file a Form 990-N

Once created, you can update your e-Postcard profile at any time. Click the button below to get started.

Manage Form 990-N Submissions

Once your e-Postcard Profile is created, you can use the Manage Form 990-N Submissions page to:

1. Create a Form 990-N
2. View the status of your existing Form 990-N submission(s)
3. Edit an in-progress Form 990-N
4. Delete an in-progress Form 990-N

CONTINUE Cancel

STEP 7

From the drop down shown below, select either **Exempt Organization** or **Preparer** in the "User Type" field.

- **Exempt Organization:** Select if you are only completing 990-N for your organization.
- **Preparer:** Select if you expect to help multiple organizations.
 - Example: a preparer can be a paid preparer, such as a CPA, volunteer or someone aiding exempt organizations at a local library. By selecting **Preparer**, you can use your login to add as many organizations as you wish.

e-Postcard Profile Home | Security Profile | Logout

e-Postcard Profile

Please select Exempt Organization or Preparer

User Type

Exempt Organization

Preparer

CONTINUE Cancel

After selecting the user type, select **CONTINUE**.

STEP 8

Enter an EIN for the organization you're filing for, then click **ADD EIN**. You may also delete EINs already associated with your profile. To continue, select **CREATE NEW FILING**.

The screenshot shows the 'e-Postcard Profile' page. At the top right are links for 'Home', 'Security Profile', and 'Logout'. Below the header, there are navigation tabs: 'e-Postcard Profile', 'Select EIN', 'My Filings', 'My Filings History', and 'My Filings History'. The main content area shows the user is logged in as 'Exempt Organization' and their user type. There is an 'EIN' field with 'XX' and a masked 'XXXXXXXX' followed by an 'ADD EIN' button. Below this, a section titled 'Currently Associated EINs' contains a table with columns for 'EIN', 'Organization Name', 'Date Added', and 'Delete'. The table is currently empty, with a message stating 'No EINs are currently associated with your ID'. At the bottom of the page are two buttons: 'CREATE NEW FILING' and 'CONTINUE'.

STEP 9

Select the EIN you wish to file for from the drop down menu. Once you have selected the EIN, select **CONTINUE**.

The screenshot shows the 'Select EIN' page. At the top right are links for 'Home', 'Security Profile', and 'Logout'. Below the header, there are navigation tabs: 'e-Postcard Profile', 'Select EIN', 'My Filings', 'My Filings History', and 'My Filings History'. The main content area has a heading 'Please select the EIN for which you want to file for'. Below this is an 'EIN' dropdown menu with 'XXXXXXXX' selected. At the bottom of the page are two buttons: 'CREATE NEW FILING' and 'CONTINUE'.

STEP 10

Complete the "Organization Details" page. If you don't understand the request, click the question mark icon for an explanation. When you have completed each line, select **CONTINUE**.

Organization Details Home Security Profile Logout

e-Postcard Profile Select EIN Organization Details Contact Information

Electronic (Web) Form 990-EO (e-Postcard)

Organization Address and Principal Officer Information

For the tax year ending

Has your organization terminated or gone out of business?

Are your gross receipts normally \$50,000 or less?

STEP 11

Complete the "Contact Information" page. If you don't understand the request, click the question mark icon for an explanation. When you have completed each line, select one of the following:

- **SAVE FILING:** Select if you are missing any requested information. This will allow you to return to complete it later.
- **SUBMIT FILING:** Select when you are sure all required information has been input.

NOTE WHEN REGISTERING OR FILING: Text fields cannot exceed 35 characters and must contain only numeric, alpha or hyphen characters unless noted otherwise. Periods, slashes, etc. will cause registration or filing errors.

Also, enter website addresses using "www" – not http://www.

Contact Information Home Security Profile Logout

e-Postcard Profile Select EIN Organization Details Contact Information

Electronic (Web) Form 990-EO (e-Postcard)

Organization Address and Principal Officer Information

Organization's legal name

If your organization conducts business using another name (DBA) enter other name

* = required field

Organization:

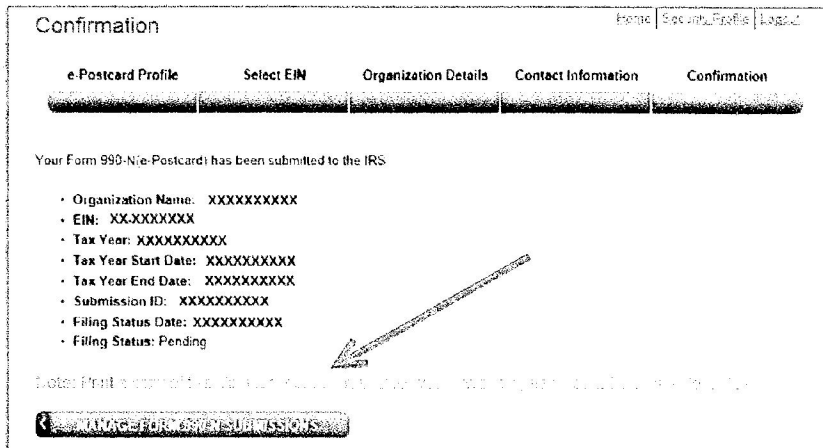
DBA Name

STEP 12

The filing "Confirmation" will display the filing status as "Pending."

Click on the word **PRINT** in the bottom paragraph to print a copy for your records. Once you leave the page, you won't be able to print this filing.

Select **MANAGE FORM 990-N SUBMISSIONS** to view or submit additional filings.



The screenshot shows a web interface titled "Confirmation" with a navigation bar containing "Home", "Security Profile", and "Logout". Below the navigation bar are five tabs: "e-Postcard Profile", "Select EIN", "Organization Details", "Contact Information", and "Confirmation". The "Confirmation" tab is active. The main content area displays the message: "Your Form 990-N(e-Postcard) has been submitted to the IRS." Below this message is a list of submission details: Organization Name: XXXXXXXXXXX, EIN: XX-XXXXXXX, Tax Year: XXXXXXXXXXX, Tax Year Start Date: XXXXXXXXXXX, Tax Year End Date: XXXXXXXXXXX, Submission ID: XXXXXXXXXXX, Filing Status Date: XXXXXXXXXXX, and Filing Status: Pending. A blue arrow points to the "Filing Status: Pending" line. At the bottom of the page, there is a "Notes" section with a "Print" button and a "MANAGE FORM 990-N SUBMISSIONS" button.

MANAGING FORM 990-N SUBMISSIONS

STEP 13

On the "Manage Form 990-N Submission" page, your submission will show the status of "Pending."

- After seven minutes, refresh the page (F5 key for Windows; Command-R for Mac) and the **GET UPDATED STATUS** button will be visible.
- Select **GET UPDATED STATUS** to see if your submission was accepted or rejected.
- If your submission was rejected, select the **submission ID** hyperlink for additional details.

TECHNICAL ASSISTANCE

If technical issues prevent you from registering or filing with the Form 990-N electronic filing system, try the suggestions below. If the problem still exists after trying all the suggestions, contact IRS Customer Account Services at 877-829-5500 (a toll-free number).

Take the following steps to prevent problems during the registration and filing processes:

- **Close multiple browsers when registering.**

Errors may occur if you have additional internet browsers open during the registration process. Please close other internet browser windows.

- **Do not use a smart phone to register or file your Form 990-N.**

- **Use correct text characters when registering and filing.**

Ensure that you use only letters, numbers or a hyphen when entering text fields. This character limit does not apply to password fields. When choosing a password on the "Security Profile" page, ensure that you only use letters, numbers, ! or #.

- **Check your spam or junk email folders.**

When registering or requesting a user-identification reminder, check your spam or junk email folders for a response. The email may have been filtered out by your email program.

- **If the suggestions above don't resolve the issue, sign out of the filing system (if logged in), close all programs and shut down your computer. Wait a minute, restart your computer and try again.**

This step is required before calling the Customer Account Services line (877-829-5500) for technical help.

ADDITIONAL INFORMATION

- [Annual Electronic Filing Requirement for Small Exempt Organizations – Form 990-N \(e-Postcard\)](#)
- [Form 990-N FAQs](#)
- [Maintaining 501\(c\)\(3\) Tax-Exempt Status](#) – Interactive training for officers and staff