



# **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 uses a calendar year (Jan. through Dec.) as its tax year, it must wait until the following January 1 (after the tax year is complete) to file.

- **Fiscal Year Filers**

If your organization uses a fiscal year (for example, Oct. 1 through Sept. 30) as its tax year, it must wait until the following October 1 (after the tax year is complete) to file.

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

## NOTE: BEFORE FILING

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 below, contact IRS Customer Account Services at 877-829-5500 (a toll-free number).

Telephone assistance is also available for individuals with TTY equipment at 800-829-4059.

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 and limit your entries to 35 characters/spaces. These character limits do not apply to password fields. When choosing a password, use only letters, numbers and special characters except the caret (^).

- **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.

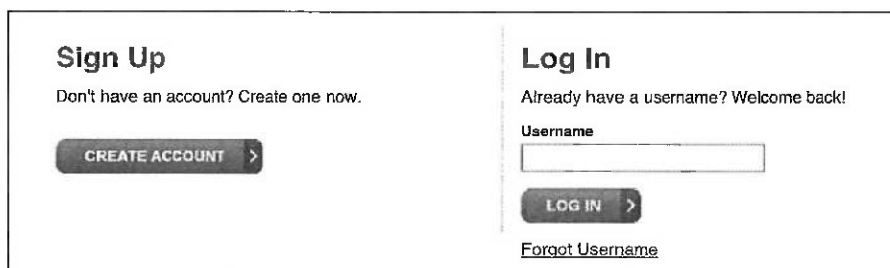
## HOW TO FILE

Open the electronic filing page at <https://www.irs.gov/charities-non-profits/annual-electronic-filing-requirement-for-small-exempt-organizations-form-990-n-e-postcard>.

After reviewing the information provided on the Form 990-N webpage, click the “Electronic Filing System” link under the **READY TO FILE?** header.

**First Time Users:** Select **Create Account**.

**Returning Users:** Enter Username and select **LOG IN**. On the next page, enter your Password and select **Submit**. Skip to **STEP 5** of this user guide. If you did not register with the new system until after February 2016, you must register as a First Time User. Your user name and password from Urban Institute will not work.



The screenshot shows two side-by-side panels. The left panel is titled "Sign Up" and contains the text "Don't have an account? Create one now." and a button labeled "CREATE ACCOUNT" with a right-pointing arrow. The right panel is titled "Log In" and contains the text "Already have a username? Welcome back!". Below this is a text input field labeled "Username" and a button labeled "LOG IN" with a right-pointing arrow. At the bottom of the right panel is a link labeled "Forgot Username".

## REGISTRATION: FIRST TIME USERS ONLY

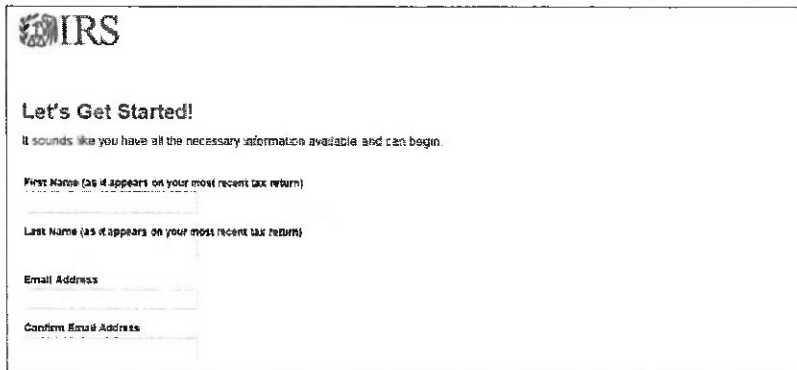
Use your personal information when registering. The login ID and password you are creating are for your personal use - to file the organization’s Form 990-N. With your login ID and password, you may file a Form 990-N for multiple organizations without the need to register for each organization. The login ID and password belong to you, not to the organization for which you are filing.

### STEP 1

Enter your contact information, then select **SEND CODE**.

### USE CORRECT TEXT CHARACTERS WHEN REGISTERING AND FILING.

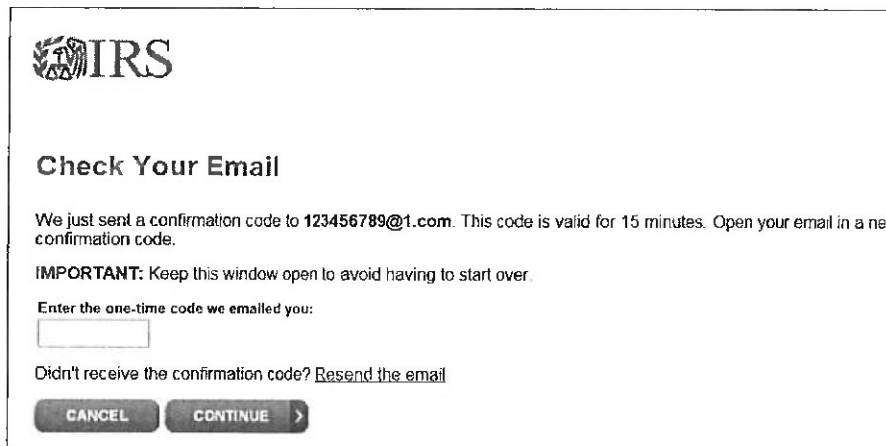
Ensure that you use only letters, numbers or a hyphen when entering text fields and limit your entries to 35 characters/spaces. These character limits do not apply to password fields - except that you cannot use the caret (^).



The screenshot shows the IRS logo at the top left. Below it is the heading "Let's Get Started!" followed by the text "It sounds like you have all the necessary information available and can begin." There are four text input fields: "First Name (as it appears on your most recent tax return)", "Last Name (as it appears on your most recent tax return)", "Email Address", and "Confirm 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.



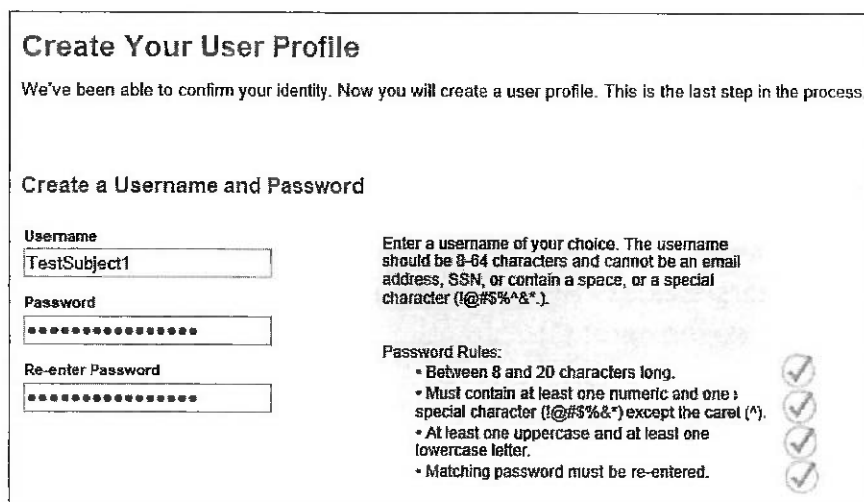
The screenshot shows the IRS logo at the top left. Below it is the heading "Check Your Email". The main text reads: "We just sent a confirmation code to 123456789@1.com. This code is valid for 15 minutes. Open your email in a new confirmation code." Below this is an "IMPORTANT" note: "Keep this window open to avoid having to start over." There is a label "Enter the one-time code we emailed you:" followed by a text input field. Below the input field is a link: "Didn't receive the confirmation code? Resend the email". At the bottom are two buttons: "CANCEL" and "CONTINUE" with a right-pointing arrow.

## STEP 3A

Choose a **USERNAME** and **PASSWORD** on the "Create Your User Profile" page.

Username field: Ensure that you use only letters, numbers or a hyphen and limit your entries to no more than 35 characters unless noted otherwise. Periods, slashes and other prohibited characters will cause registration or filing errors. These character limits do not apply to password fields.

Password field: You may use letters, numbers and special characters except the caret (^).



The screenshot shows the heading "Create Your User Profile". Below it is a sub-heading "Create a Username and Password". There are three input fields: "Username" (containing "TestSubject1"), "Password" (masked with dots), and "Re-enter Password" (also masked with dots). To the right of the input fields is a text box with instructions: "Enter a username of your choice. The username should be 8-64 characters and cannot be an email address, SSN, or contain a space, or a special character (!@#\$%^&\*)." Below this is a "Password Rules:" section with four bullet points, each followed by a checkmark icon: "Between 8 and 20 characters long.", "Must contain at least one numeric and one special character (!@#\$%^&\* except the caret (^)).", "At least one uppercase and at least one lowercase letter.", and "Matching password must be re-entered."

### 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.

Choose a Site Phrase


Create a phrase that you will recognize when you login

### 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.

Choose a Site Image

Select an image that you will recognize when you login



Choose Your Site Image



### 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**.

**Challenge Questions**

**Answer Rules**

- The same answer cannot be used more than once.
- The answer can not be a word or number that is part of the secret question.

Question 1

Answer 1

Question 2

Answer 2

Question 3

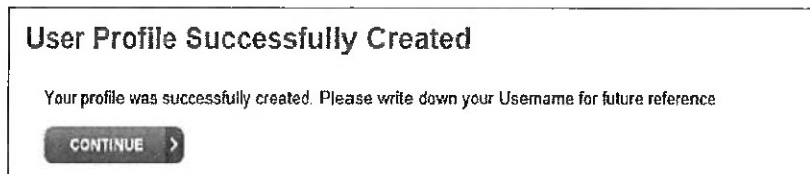
Answer 3

Question 4

Answer 4

## STEP 4

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



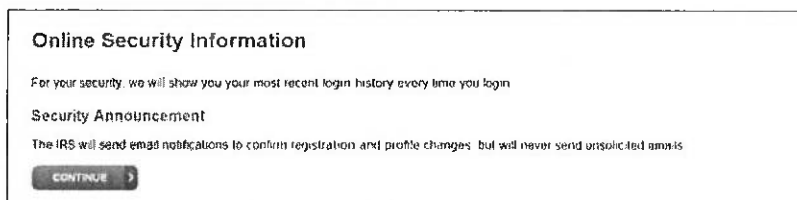
**User Profile Successfully Created**

Your profile was successfully created. Please write down your Username for future reference

**CONTINUE** >

## STEP 5

Select **CONTINUE** on the “Online Security Information” page.



**Online Security Information**

For your security, we will show you your most recent login history every time you login

**Security Announcement**

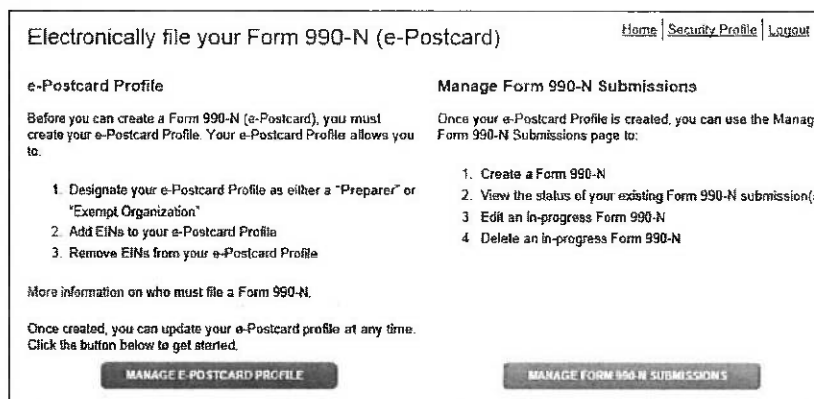
The IRS will send email notifications to confirm registration and profile changes, but will never send unsolicited emails

**CONTINUE** >

## 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 E-POSTCARD PROFILE**

**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

**MANAGE FORM 990-N SUBMISSIONS**

### 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.

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

The screenshot shows the 'e-Postcard Profile' page with a progress bar at the top. The progress bar has five segments: 'e-Postcard Profile' (highlighted), 'Select EIN', 'Organization Details', 'Contact Information', and 'Confirmation'. Below the progress bar, the text reads 'Please select Exempt Organization or Preparer'. Underneath, there is a 'User Type' dropdown menu with the following options: 'Select One', 'Exempt Organization', and 'Preparer'. At the bottom of the dropdown menu, there are two buttons: 'PREVIOUS' and '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 with the same progress bar as in Step 7. Below the progress bar, the text reads 'You are logged in as: Exempt Organization Edit user type'. Below this, there is an 'EIN' input field with 'XX' in the first two characters and 'XXXXXXXX' in the next eight characters. To the right of the input field is an 'ADD EIN' button. Below the input field, there is a section titled 'Currently Associated EIN(s)' with a table. The table has four columns: 'EIN', 'Organization Name', 'Date Added', and 'Delete'. Below the table, the text reads 'No EINs are currently associated with your ID'. At the bottom of the section, there are two buttons: 'DELETE EIN' and 'CREATE NEW FILING'.

### 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 with a progress bar at the top. The progress bar has five segments: 'e-Postcard Profile', 'Select EIN' (highlighted), 'Organization Details', 'Contact Information', and 'Confirmation'. Below the progress bar, the text reads 'Please select the EIN for which you want to file for'. Below this, there is an 'EIN' dropdown menu with the text 'Select EIN' and a downward arrow. At the bottom of the page, there are two buttons: 'MANAGE E-POSTCARD PROFILE' 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**.

The screenshot shows the 'Organization Details' page. At the top right are links for 'Home', 'Security Profile', and 'Logout'. Below these is a progress bar with five steps: 'e-Postcard Profile', 'Select EIN', 'Organization Details', 'Contact Information', and 'Confirmation'. The 'Organization Details' step is currently active. The page content includes the title 'Electronic Notice-Form 990-N (e-Postcard)', the section 'Organization Information', and the prompt 'For the tax year ending'. There are two dropdown menus with question mark icons: 'Has your organization terminated or gone out of business?' and 'Are your gross receipts normally \$50,000 or less?'. A question mark icon is also present next to the 'For the tax year ending' field.

## 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 and so on will cause registration or filing errors.

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

The screenshot shows the 'Contact Information' page. At the top right are links for 'Home', 'Security Profile', and 'Logout'. Below these is a progress bar with five steps: 'e-Postcard Profile', 'Select EIN', 'Organization Details', 'Contact Information', and 'Confirmation'. The 'Contact Information' step is currently active. The page content includes the title 'Electronic Notice-Form 990-N (e-Postcard)', the section 'Organization Address and Principal Officer Information', and the prompt 'Organization's legal name:'. There is a text input field for the legal name. Below this is the prompt 'If your organization conducts business using another name (DBA), enter other name:' followed by a note '\* = required field'. There is another text input field for the DBA Name. A question mark icon is present at the bottom right of the page.

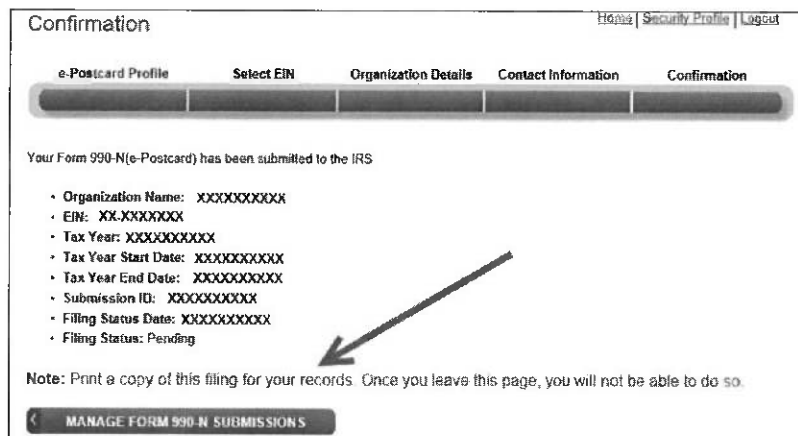


## STEP 12

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 "e-Postcard Profile", "Select EIN", "Organization Details", "Contact Information", and "Confirmation". Below the navigation bar, a message states: "Your Form 990-N(e-Postcard) has been submitted to the IRS". A list of details follows: 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 note at the bottom says: "Note: Print a copy of this filing for your records. Once you leave this page, you will not be able to do so." Below the note is a button labeled "MANAGE FORM 990-N SUBMISSIONS". An arrow points from the "Filing Status: Pending" line to the 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.
- The status will change from pending to accepted or rejected.
- If your submission was rejected, select the **submission ID hyperlink** for additional details.
- After the status is updated, the only valid statuses are “Accepted” or “Rejected.” If your status displays any other text (like “submitted” or “MeF failed”), contact Customer Account Services at 877-829-5500.

## Additional Information

- [Annual Electronic Filing Requirement For Small Exempt Organizations - Form 990-N \(e-Postcard\)](#)
- [Form 990-N FAQs](#)