# **IRS Form 990-N e-Postcard Quick Start**

## Chapter 1: Steps for filing an e-Postcard

To file an e-Postcard you must perform the following step:

Register with the <u>epostcard.form990.org</u> website as either an Exempt Organization or Preparer.
Register as an exempt organization if you will only be completing the 990-N for your organization.

- Register as a **preparer if you** expect to help multiple organizations. For example, a **preparer** can be a paid preparer, such as a CPA, or a volunteer aiding exempt organizations at a local library. By registering as a **Preparer**, you can use your login to register as many organizations as you wish.

- 2. Respond to the activation email sent during the registration process.
- 3. Complete and submit the e-Postcard for an exempt organization.

# **Chapter 2: Getting Started**

The e-Postcard website is designed to display in Microsoft Internet Explorer for Windows, Version 5.5 or higher, or Mozilla Firefox at a screen resolution of 1024 x 768 pixels.

**Important!** You will be required to enter an email address during the registration process. You must make sure that your email filters will allow email from <u>epostcard@urban.org</u> to be received.

#### **Registration information needed**

To register with the <u>epostcard.form990.org</u> website you will need the following information:

- 1. Are you registering as an **Exempt Organization** or are you registering as a **Preparer**.
- 2. If registering as an exempt organization, you will need the Employer Identification Number (EIN) for the exempt organization.

**Important!** The exempt organization submitting an e-Postcard filing must be registered with the IRS. See the <u>Annual Electronic Filing Requirement for Small Exempt Organizations — e-Postcard (Form 990-</u><u>N)</u> website for further information on qualifying as an organization that can submit an e-Postcard filing. You need the EIN used when registering the organization with the IRS.

3. Preparers need to provide a Login ID.

Note: Login IDs are automatically generated for exempt organizations.

4. Preparers need to provide a business name.

**Note:** The organization name is used for an exempt organization. It is the name for the EIN as registered with the IRS.

- 5. Password
- 6. Your first and last name
- 7. Your email address

**Note:** The email address is used to activate the registration and to communicate status information about filings. It is not transmitted to the IRS.

8. Daytime telephone

#### e-Postcard information needed

**Important!** The exempt organization's fiscal year for the year they are filing must be over before filing an e-Postcard. The IRS determines the filing year using the beginning date of the fiscal period. If your fiscal period begins February 1, 2007, you will not be able to file for the 2007 filing year until February 1, 2008.

1. Employer Identification Number (EIN) for the exempt organization filing the e-Postcard.

Note: The EIN is automatically determined for an exempt organization registration. A preparer must provide an EIN for the e-Postcard they are filing.

- 2. Is the exempt organization terminated or going out of business (Yes or No)?
- 3. Are the exempt organization's gross receipts normally \$25,000 or less (Yes or No)?

Important! If the exempt organization is a supporting organization, the limit is \$5,000 or less.

4. Supporting organizations must also answer the following question. Do you support only religious organizations (Yes or No)?

**Important!** The exempt organization must answer Yes to 3 and 4 (4 for supporting organizations only) to file an e-Postcard.

- 5. One or more other (DBA doing business as) names used by the organization.
- 6. Organization's mailing address
- 7. Organization's website address (if the organization has a website)
- 8. Principal Officer's name and address.

Note: For certain exempt organizations, this name may be a business name.

# Chapter 3: Accessing the website

The e-Postcard Front-End application is accessed at the <u>http://epostcard.form990.org</u> URL. Upon accessing the URL, the Home web page is displayed. Figure 1 shows the web page.



#### Figure 1. Home web page

The normal steps in submitting an e-Postcard filing to the IRS are:

- 1. To register as a new user.
- 2. Create a new e-Postcard filing and
- 3. Submit the filing.

The following chapters explain these steps.

# Chapter 4: Registering with the website

Click Step 1: Register as a New User

Figure 2 shows the Request Login ID (page 1) web page.

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Figure 2. Request Login ID (page 1) web page

Click the **Next>>** button.

Figure 3 shows the Request Login ID (page 2) web page.

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### Figure 3. Request Login ID (page2) web page

Select if you are registering as an **Exempt Organization** or as a **Preparer**.

If you are registering as an Exempt Organization, enter your EIN.

Click the **Next>>** button.

Figure 4 shows the Request Login ID (page 3) web page for an **Exempt Organization**.

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Figure 4. Request Login ID web page for an Exempt Organization

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#### Figure 5. Request Login ID (page 3) web page for a Preparer

Enter the requested information and click the **Next>>** button.

The information you enter is validated. Any errors are reported and you need to fix them. When all data is valid, an activation email is sent to the email address you provided.

**Important!** You must make sure that your email filters will allow email from <u>epostcard@urban.org</u> to be received.

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Figure 6 shows the Request Login ID – Success web page.

### Figure 6. Request Login ID (page 4) web page

Close your web browser and wait for the activation email to arrive.

Figure 7 shows a sample of the Activation Email.



### Figure 7. e-Postcard Login ID Activation Notice

Click the link in the email to return to efile.form990.org and activate your Login ID.

**Important!** Some email user interfaces can be configured to turn off links in the email. You should have links enabled to easily return to the website to activate your Login ID. Alternatively, you may cut and paste the link into your web browser. The link must be sent exactly as provided.

When you click on the link in the e-Postcard Login ID activation notice email, you are sent to the Activate Login ID web page. Figure 8 shows the web page.

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### Figure 8. Activate Login ID web page

Enter the password you entered during the registration process.

Click the **Next>>** button.

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Password:	Form990	
Name:	Penn Oak	
Organization:	SUPPORTING ORGANIZATION INC	
Email:	testuser25@urbantest.com	
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The Activate Login ID (Success) web page is displayed. Figure 9 shows the web page.

Figure 9. Activate Login ID (Success) web page

Click the Create your Form 990-N (e-Postcard) Now button to create a new e-Postcard filing.

# Chapter 5: Entering a new e-Postcard filing

When you click **Create your Form 990-N (e-Postcard) Now** button on the **Activate Login ID (Success)** web page, you start entering the e-Postcard information.

If you are a Preparer, the web page shown in Figure 10 is displayed.

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Figure 10. Create a new e-Postcard filing – Preparer EIN entry

If you are a preparer, enter the EIN for the organization that is filing the e-Postcard and click the **Submit EIN** button. You are then taken to the web page shown in Figure 11 or Figure 12.

If you are registered as an exempt organization, you are taken directly to the page shown in Figure 11 or Figure 12.

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Figure 11. Create a new e-Postcard filing – exempt organizations other than 509(a)(3) Supporting Organizations

**Important!** The exempt organization's fiscal year for the year they are filing must be over before filing an e-Postcard. The IRS determines the filing year using the beginning date of the fiscal period. If your fiscal period begins February 1, 2007, you will not be able to file for the 2007 filing year until February 1, 2008. The system uses the exempt organization's information registered with the IRS to determine your fiscal year. You need to contact the IRS if the fiscal year is different.

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Do you support only	religious organizat	ions?	?				
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### Figure 12. Create a new e-Postcard filing – 509(a)(3) Supporting Organizations

Enter the requested information and click the **Next Page** button.

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City or town	(?)
State	
Zip code	
Organization's website address, if applicable	

The second page of the e-Postcard entry is displayed. Figures 13 and 14 show this web page.

Figure 13. Organization Address and Principal Officer Information (Edit Filing (page 2)) web page

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Principal Officer:			
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Person Name	⑦		
Country	0		
	United States	*	
Number and street (or PO Box) - Line 1	(?)		
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City or town	0		
State	0		
Zip code			
Previous Page	Save Changes Submit Filing to IRS		
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Figure 14. Edit Filing (page 2) web page (continued)

Enter the requested information and click the **Submit Filing To IRS** button.

The Form 990-N (e-Postcar	d) Submitted web p	age is displayed.	Figure 15 shows th	nis web page.
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Figure 15. Form 990-N (e-Postcard) Submitted web page

This completes your filing process.

At this point, the e-Postcard filing has been queued for transmission to the IRS. This process usually takes ten to fifteen minutes. You are sent an email notifying you of the results of this transmission. Figure 16 shows a sample accepted email.

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From: epostcard@urban.org	Sent: Fri 2/15/2008 9:29 AM
To: testuser25@urbantest.com	
Cc:	
Subject: Form 990-N E-filing Receipt - IRS Status: Accepted	
Organization: SUPPORTING ORGANIZATION INC	
EIN: 11-9000025	
Submission Type: Form 990-N	
Year: 2007	
Submission ID: /80058200804660000129	
Accented Date: 2/15/2008	
The IRS has accepted the e-Postcard described	above. Please save this receipt for
your records.	
Thank you for filing.	
e_Dostrard technical sunnort	
Phone: 888-887-0084 (toll free)	
email:ePostcard@urban.org	
Hours: 8:00 AM to 8:00 pm Eastern	
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SUPPORTING ORGANIZATION INC	
655 Bradford St	
Nixon, WV 89424	
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Figure 16. Form 990-N e-Filing Accepted email