



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 interface. It is divided into two main sections: 'First Time Users' and 'Returning Users'.
First Time Users: A blue button labeled 'GET STARTED >' is visible. Above it, text reads: 'If this is the first time you are using this online service, we will need to verify your identity before we proceed.'
Returning Users: Text reads: 'Log in below if you've previously registered through any of the following applications:'. Below this is a bulleted list: '• Get Transcript', '• Identity Protection PIN (IP PIN)', '• Online Payment Agreement (OPA)', and '• ePostcard'. There is a 'Username' label above a text input field. Below the input field is a checkbox labeled 'Mask Username'. At the bottom of this section is a blue button labeled 'LOG IN >' and a purple link labeled 'Forgot Username'.

First time - follow instructions

You will need your chapter EIN and IRS fiscal year dates to register.

Returning - enter Username

If you forget your Username, click on the Forgot Username link and enter the email address you used when registering. Your Username will be sent to that email.

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**

The screenshot shows the IRS logo at the top left. Below it, the title "Step 1 of 4: Personal Information" is displayed. A note states "All fields are required." There are four input fields: "First Name", "Last Name", "Email Address", and "Re-Enter Email Address". At the bottom, there are two buttons: "CANCEL" and "SEND EMAIL CONFIRMATION CODE" with a right-pointing arrow. A message at the bottom of the form reads "A confirmation code will be sent to your email address."

Use Chief Advisor to provide continuity. No personal information is requested.

May only ask for email to be entered once.

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, the title "Step 2 of 4: Verify Identity" is displayed. A green warning box contains an exclamation mark icon and the text: "Do not close this browser window or you will have to restart the process." followed by a bulleted list: "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.", and "If you don't receive a confirmation code within 15 minutes, please select cancel and request a new code." Below the warning box is the label "Enter Confirmation Code" and an input field. At the bottom, there are two buttons: "CANCEL" and "CONTINUE" with a right-pointing arrow.

Enter code sent to email above.

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 #.

User ID should be some form of chapter name which meets the 8-20 character/no spaces limit.

For example: AlabamaAlpha or CAAlphaAlpha.

BE SURE TO RECORD FOR FUTURE REFERENCE!

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.

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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.

BE SURE TO RECORD FOR FUTURE REFERENCE!

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

CANCEL **CONTINUE** >

Select from choices given.

BE SURE TO RECORD FOR FUTURE REFERENCE!

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 Services” page.

Your login history

For your security, we will show you your recent login activity every time you login.

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

First time - Manage E-Postcard profile

Returning - Manage 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.

e-Postcard Profile [Home](#) | [Security Profile](#) | [Logout](#)

e-Postcard Profile Select EIN Organization Details Contact Information Confirmation

Please select Exempt Organization or Preparer

User Type

Select One
Exempt Organization
Preparer

PREVIOUS **CONTINUE**

Use Exempt Organization

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 with a progress bar at the top. The current step is 'Select EIN'. Below the progress bar, it says 'You are logged in as: Exempt Organization' with an 'Edit user type' link. There is an 'EIN' input field with a dropdown menu showing 'XX' and a text input field with 'XXXXXXXX'. An 'ADD EIN' button is next to the input fields. Below this, there is a section titled 'Currently Associated EIN(s)' with a table that is currently empty, showing 'No EINs are currently associated with your ID'. At the bottom, there are two buttons: 'DELETE EIN' and 'CREATE NEW FILING'.

Enter chapter EIN.

DO NOT use HQ EIN

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 current step is 'Select EIN'. Below the progress bar, there is a red instruction: 'Please select the EIN for which you want to file for'. There is an 'EIN' dropdown menu with a blue background and a downward arrow, currently showing '-Select EIN-'. Below the dropdown, there are two buttons: 'MANAGE E-POSTCARD PROFILE' and 'CONTINUE'.

EIN should appear in pull down list.

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**.

This field is pre-populated with the current tax year.

Answer No to the second question.

The third question is usually No.

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.

Legal name is:

Tau Beta Pi Association, Inc

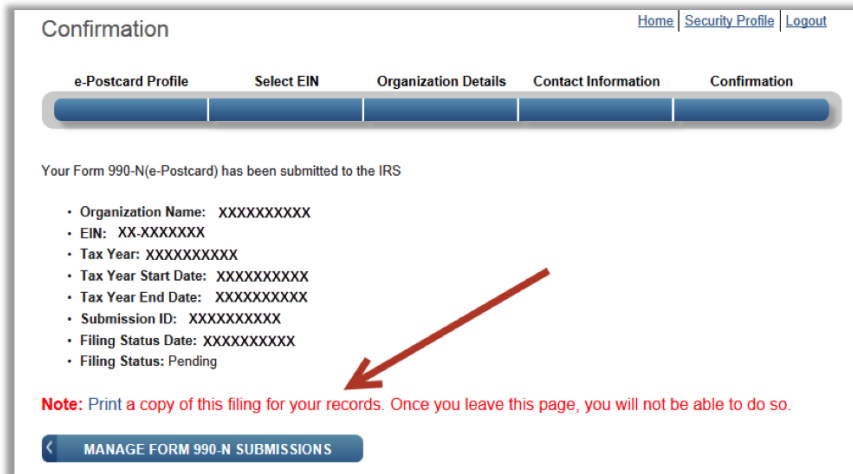
DBA name can be the chapter

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 navigation links for Home, Security Profile, and Logout. A progress bar at the top indicates the current step is "Confirmation". The main content area states: "Your Form 990-N(e-Postcard) has been submitted to the IRS". Below this, a list of details is provided: 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 red arrow points to a "Note" at the bottom: "Print a copy of this filing for your records. Once you leave this page, you will not be able to do so." At the bottom left, there is a button labeled "MANAGE FORM 990-N SUBMISSIONS".

Be sure to print this page, scan it, and email to HQ (tbp@tbp.org) to receive credit for the report.

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