

The IRS has discontinued their partnership with the Urban Institute. Therefore, the change in filing will begin effective as of March 1, 2016, and the following instructions will assist with this transition.

Previously the website <https://epostcard.form990.org> was used to complete this process. Upon logging on to this website, you will see an error that says “*This e-Postcard system is no longer available.*” A link will be provided to take you to the IRS “*Annual Electronic Filing Requirements for Small Exempt Organizations*” page. From there, you will have the option of clicking the link circled below.

Annual Electronic Filing Requirement for ♥ + 🖨
Small Exempt Organizations — Form 990-N (e-Postcard)
How to file
To electronically submit Form 990-N, *Electronic Notice (e-Postcard) for Tax-Exempt Organizations Not Required to File Form 990 or Form 990EZ*, use the [Form 990-N Electronic Filing system \(e-Postcard\)](#).

You will then be directed to a secure IRS webpage as shown below.



First Time Users

Create a Login to:

- Verify your identity for access to your personal tax information.
- Create a user ID and password to save time on future visits.
- Lock your online account to prevent access.

[Information you need to verify your identity.](#)

GET STARTED >

Returning Users

Log in below if you've previously created a UserID for any of the following applications:

- Get Transcript
- Identity Protection PIN (IP PIN)
- Online Payment Agreement (OPA)

User ID

Mask User ID

LOGIN >

[Forgot User ID](#)

[Lock your online account to prevent access](#)

Since most of the users have not accessed this site previously, the first step will be to register as a **First Time User**. To create a login, users must verify their identity to access tax information, and create a user ID and password to save time on future visits. To begin, select “*Get Started*.”

After the page redirects, you will be asked to enter:

- Your first name, last name, email address, and then re-enter email address.
- Select “*Send email confirmation Code*.” A confirmation code will be sent to the email address that you will need for the second portion of setting up your new account.
- Open your personal email and wait for an access code from the IRS. Typically you will receive a response with this information within ten minutes. The email will come from IRS.online.services@irs.gov. If you do not see it in your inbox, it may have gone into your spam folder.
- The email will begin with “*Dear User*” and the first sentence will read “*Your confirmation code is*.”
- Once you have that code, go back to the IRS website you were on previously, and complete **Step 2 of 4: Verify Identity**, which will ask you for your confirmation code. Enter your code and select “Continue.” **Note:** when typing in the information, do not include the dash, as it will be inserted for you.

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

CANCEL CONTINUE >

You will now be redirected to step 3 of 4, which is setting up a **security profile**. This is an important step because it will be personal to you, and will prohibit individuals from accessing your information. The steps are as follows:

1. Create a user ID and password. The user ID cannot be an email address, social security number, contain a space or a special character. It **does not** have to be your unit EIN. After you select a user ID, you will need to select a password. The password must be between 8 and 20 characters long, contain at least one numeric and one special character (!@#\$%^&*), one

uppercase and one lowercase letter, and a matching password must be reentered.

2. Next you will see information regarding your email address. The primary email address will be shaded gray because it has been confirmed with the IRS. As a user you can include a secondary email address if desired.
3. You are required to then enter a unique phrase which will be included in confirmation emails sent by the IRS Online Services. This can be something brief, typically a few words, and can be anything that you wish it to be.
4. The next item to complete is a site phrase. This is a phrase that will be visible to you when you log into the IRS website to complete your 990-N e-Postcard. Again, this can be anything you wish, but should be limited to a few words.
5. After that, select a site image that you will recognize when you login. There are several photos available, and you have the option to pick any of them that you feel you will recognize easiest. Click on the green arrow on the right hand side of your screen to see additional photos.
6. The final step in setting up an account is selecting four security questions. The answers cannot be used more than once, and cannot be a word or number that is a part of the secret question.
7. After you have completed all of these items, you are ready to select “*Continue.*” You will then see a page that states “*Your user profile was successfully created!*” Be sure to write down your User ID and password for future reference.
8. You’re now ready to move forward, and can do so by clicking “*Continue.*”

The next step in this process is to manage your 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 designate the filer type, add EINs, and remove EINs from your e-Postcard profile. This is beneficial to individuals who file postcards for multiple entities. Going forward, a list of all EINs will be available in this section and will not require additional log-in’s for each postcard.

The page that you are directed to will ask for information pertaining to the unit or state department filing. To add the EIN, complete the following steps:

1. Select a user type – Exempt Organization. Click “*Continue.*”
2. Enter your EIN – the first two digits go in box one, the remainder go in box two. **Note:** the nine digit EIN should be entered. Click “*Add EIN.*”

3. If you file more than one 990-N, continue this process until they are all added. Once done, click “*Create New Filing.*”
4. Using the drop down, select the EIN that you’re filing the 990-N for and click “*Continue.*”
5. As the preparer, you are only required to answer questions 2 and 3. Question 2 asks, “*Has your organization terminated or gone out of business?*” (No). Question 3 asks, “*Are your gross receipts normally \$50,000 or less?*” (Yes). Click “*Continue.*”
6. The next step is contact information. The DBA Name is the Unit Name/Number or State Department name. Enter the address of the unit adjutant. Remember to select “United States” from the country drop down box. For principal officer, select “*Person*” from the type of name dropdown. Enter the Adjutant again. Then click “*Submit Filing.*”
7. A warning will then come on your screen that asks if you want to save the data and submit the filing to the IRS. Once you submit the e-Postcard, you will no longer be able to edit the information. Select “*OK*” to confirm submission, or *Cancel* if there is something that needs to be reviewed or changed.
8. You will then receive a confirmation that the information has been submitted. It will include the organization name, EIN, tax year, start date, end date, submission ID, filing status date, and status. Always **print** this page for your records. Once you leave this page you are unable to access it again.

A confirmation will no longer be sent to the email address that you have registered with. To check the status of the electronic filing, log into the 990 Electronic Filing System and go to the “Manage Form 990-N Submission” page. It will indicate the status for each Form 990-N submitted – indicating whether the form was accepted or rejected. If it was rejected, click on the “Submission ID” link for additional details. **A copy of the acceptance must be sent to your state department and national headquarters.**

While we realize this process is time consuming, it is necessary for all units and state departments to stay compliant with IRS guidelines. Failure to file a 990-N e-Postcard for three consecutive years will result in IRS revocation of the unit’s or state department’s tax exempt status. Reinstatement is a costly and time consuming project and can be avoided by prompt filing. If you have any questions or concerns regarding this change, please contact our office at 877.426.2838, option 5.