HOW TO COMPLETE THE NEW 990N POSTCARD

IRSForm990-N

ElectronicFilingSystem (e-Postcard)

Department of the Treasury Internal Revenue Service www.irs.gov

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

HOW TO FILE


First Time Users: Select GET STARTED.

You must register again as a First Time User. Your user name and password from Urban Institute (the old system) will not work.
REGISTRATION

STEP 1

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

![Image of IRS registration form]

**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.

[CANCEL] [SEND EMAIL CONFIRMATION CODE]
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 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**.

![Challenge Questions Form](image)

STEP 4

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

![User Profile Successfully Created](image)
STEP 5
Select **CONTINUE** on the “Online Services” page.

CREATE AN ELECTRONIC FORM SUBMISSION

STEP 6
Select **MANAGE E-POSTCARD PROFILE** to create a new Form 990-N electronic filing submission.
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**.

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**.
STEP 9

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

http://www

Also, enter website addresses using “www”
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. The IRS no longer emails a submission acknowledgement. When you print this page scan an email to the state office. WI PTA Email address is info@wisconsinpta.org. This is part of the good standing requirement and is due by December 15 to the state office.

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

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