

# HOW TO COMPLETE THE NEW 990N POSTCARD

IRSForm990-N

ElectronicFilingSystem (e-Postcard)

Department of the Treasury **Internal Revenue Service** [www.irs.gov](http://www.irs.gov)

[Steps for using the Form 990-N Electronic Filing System \(e-Postcard\)](#)

## HOW TO FILE

Open the electronic filing page at <https://sa.www4.irs.gov/epostcard/>.



The screenshot shows the login interface for the IRS e-Postcard system. It is divided into two main sections: 'First Time Users' and 'Returning Users'.  
**First Time Users:** This section includes the text 'If this is the first time you are using this online service, we will need to verify your identity before we proceed.' and a blue button labeled 'GET STARTED >'.  
**Returning Users:** This section includes the text 'Log in below if you've previously registered through any of the following applications:' followed by a bulleted list: 'Get Transcript', 'Identity Protection PIN (IP PIN)', 'Online Payment Agreement (OPA)', and 'ePostcard'. Below this list is a 'Username' input field, a checkbox for 'Mask Username', a blue button labeled 'LOG IN >', and a purple link for 'Forgot Username'.


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](#)



**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.

The screenshot shows the IRS logo at the top left. Below it, the heading "Step 2 of 4: Verify Identity" is displayed. A green callout box contains a warning icon and the following text: "Do not close this browser window or you will have to restart the process." followed by three bullet points: "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 callout box is a text input field labeled "Enter Confirmation Code". At the bottom, there are two buttons: "CANCEL" and "CONTINUE >".

## 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 #.

The screenshot shows the heading "Step 3 of 4: Security Profile" and the text "All fields are required." Below this, the section "User ID and Password" is highlighted in red. It contains three input fields: "User ID", "Password", and "Re-enter Password". Below these is a "Primary Email" input field. To the right of the input fields, a grey callout box contains the following text: "Enter a User ID of your choice. The User ID cannot be an email address, SSN, or contain a space, or special character (!@#\$\$%^&\*)." followed by "Password Rules:" and a list of four bullet points: "Between 8 and 20 characters long.", "Must contain at least one numeric and one special character (!@#\$\$%^&\*).", "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](#)



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## 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

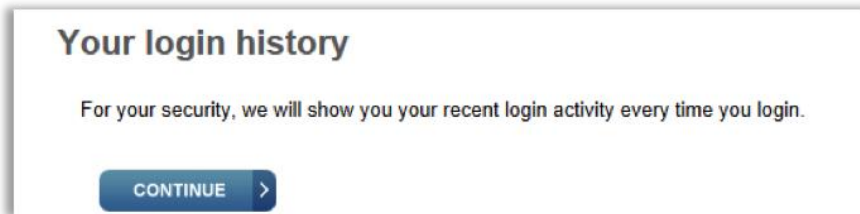
The “User Profile Successfully Created” page will appear. Select **CONTINUE**.

**User Profile Successfully Created**

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

## STEP 5

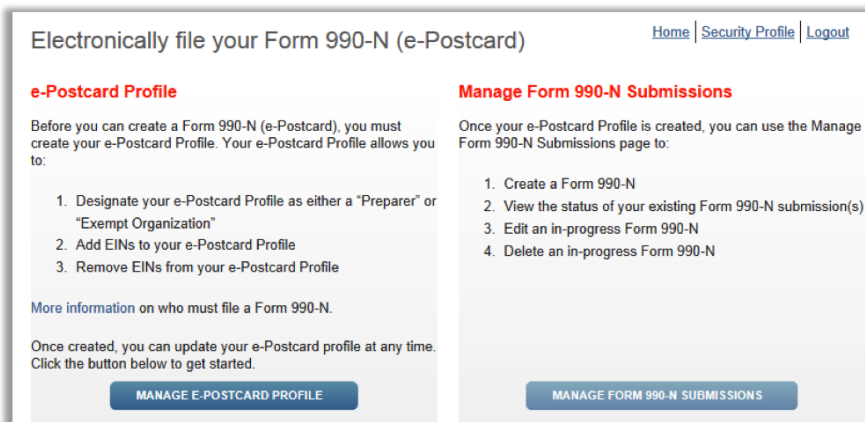
Select **CONTINUE** on the “Online Services” page.



## CREATE AN ELECTRONIC FORM SUBMISSION

### STEP 6

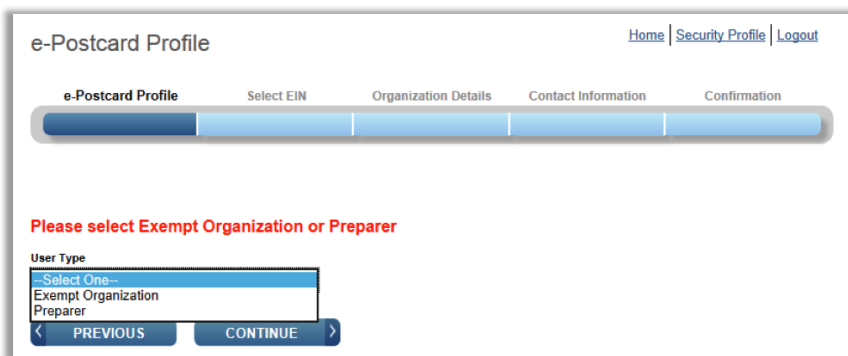
Select **MANAGE E-POSTCARD PROFILE** to create a new Form 990-N electronic filing submission.



## 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.

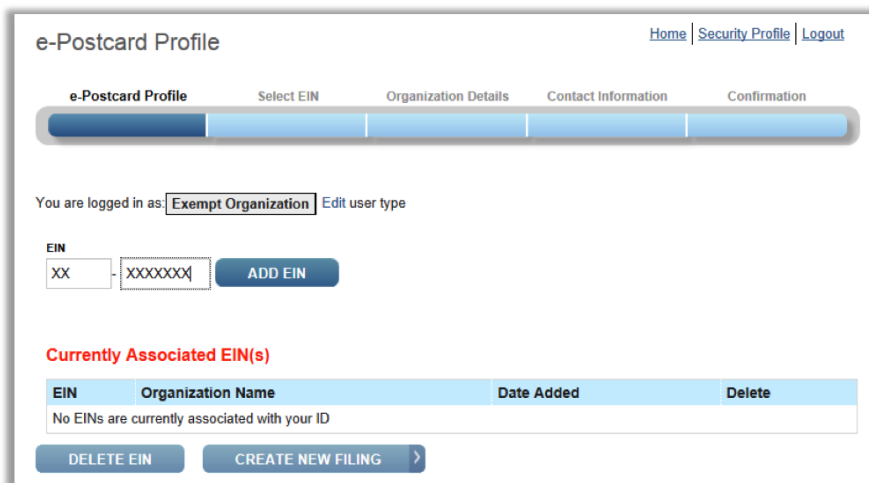


The screenshot shows the "e-Postcard Profile" page with a progress bar at the top. The "User Type" dropdown menu is open, showing three options: "Select One--", "Exempt Organization", and "Preparer". Below the dropdown are "PREVIOUS" and "CONTINUE" buttons.

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**.



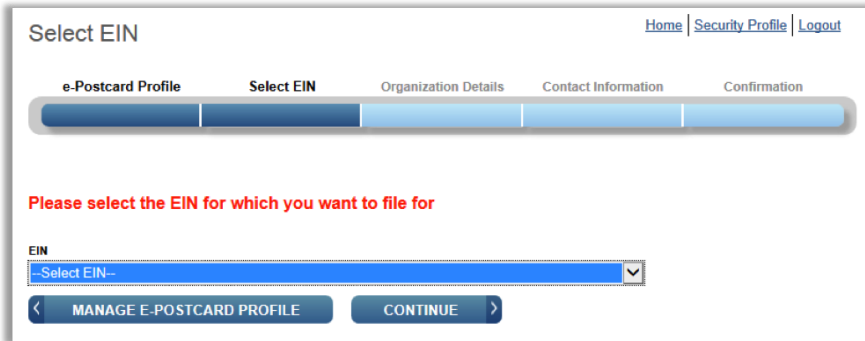
The screenshot shows the "e-Postcard Profile" page with the progress bar. Below the progress bar, it says "You are logged in as: Exempt Organization | Edit user type". There is an "EIN" input field with "XX" and "XXXXXXX" placeholders, and an "ADD EIN" button. Below this is a section titled "Currently Associated EIN(s)" with a table that is currently empty, showing columns for "EIN", "Organization Name", "Date Added", and "Delete". At the bottom, there are "DELETE EIN" and "CREATE NEW FILING" buttons.

EIN	Organization Name	Date Added	Delete
No EINs are currently associated with your ID			

## STEP 9

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

**CONTINUE.**

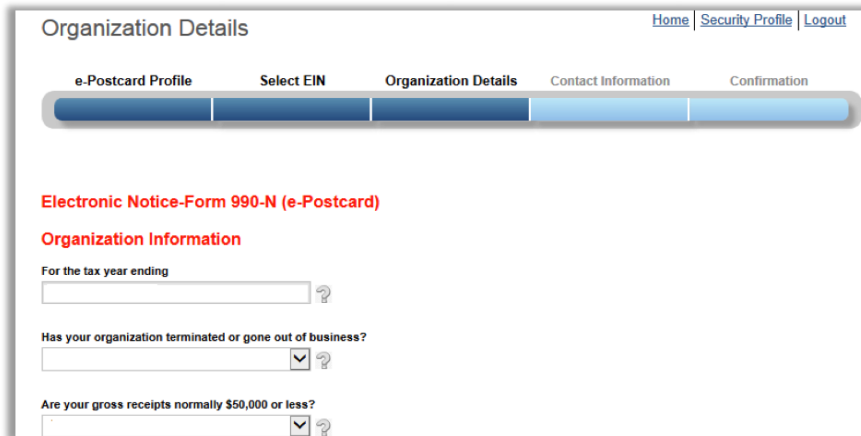


The screenshot shows a web application interface for the 'Select EIN' step. At the top right, there are links for 'Home', 'Security Profile', and 'Logout'. Below these is a progress bar with five segments: 'e-Postcard Profile', 'Select EIN', 'Organization Details', 'Contact Information', and 'Confirmation'. The 'Select EIN' segment is currently active. Below the progress bar, a red instruction reads: 'Please select the EIN for which you want to file for'. Underneath is a dropdown menu labeled 'EIN' with the text '-Select EIN-'. At the bottom, there are two buttons: 'MANAGE E-POSTCARD PROFILE' with a left arrow and 'CONTINUE' with a right arrow.

## 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' step of the web application. At the top right, there are links for 'Home', 'Security Profile', and 'Logout'. Below these is a progress bar with five segments: 'e-Postcard Profile', 'Select EIN', 'Organization Details', 'Contact Information', and 'Confirmation'. The 'Organization Details' segment is currently active. Below the progress bar, a red heading reads: 'Electronic Notice-Form 990-N (e-Postcard)'. Underneath is another red heading: 'Organization Information'. There are three form fields, each with a question mark icon to its right: 1. 'For the tax year ending' followed by a text input field. 2. 'Has your organization terminated or gone out of business?' followed by a dropdown menu. 3. 'Are your gross receipts normally \$50,000 or less?' followed by a dropdown menu.



## 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”

Contact Information [Home](#) | [Security Profile](#) | [Logout](#)

e-Postcard Profile    Select EIN    Organization Details    **Contact Information**    Confirmation

**Electronic Notice-Form 990-N (e-Postcard)**

**Organization Address and Principal Officer Information**

Organization's legal name:

If your organization conducts business using another name (DBA), enter other name:

\* = required field

**Organization:**

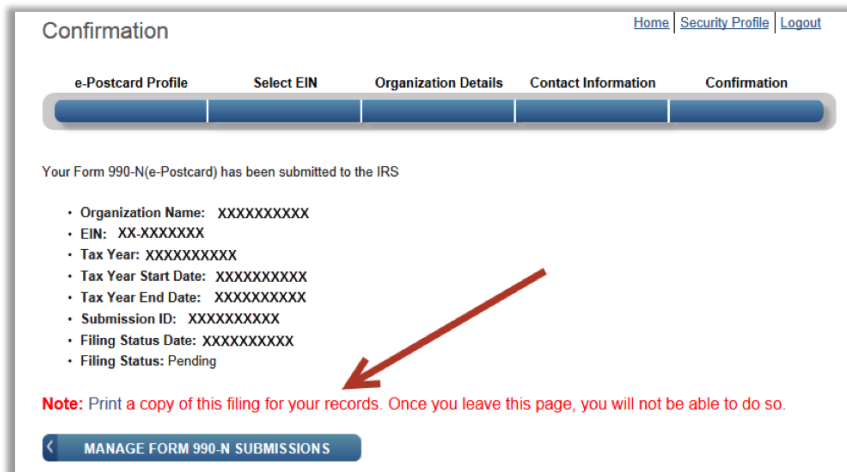
DBA Name  ?

## 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](mailto: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.



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: XXXXXXXXXXXX, EIN: XX-XXXXXXX, Tax Year: XXXXXXXXXXXX, Tax Year Start Date: XXXXXXXXXXXX, Tax Year End Date: XXXXXXXXXXXX, Submission ID: XXXXXXXXXXXX, Filing Status Date: XXXXXXXXXXXX, and Filing Status: Pending. A red arrow points to a red note: "Note: 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, there is a button labeled "MANAGE FORM 990-N SUBMISSIONS".

## 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