



# IRS Form 990-N Electronic Filing System (e-Postcard) User Guide

This is a modified version of the booklet found on the IRS web site at:  
<https://www.irs.gov/pub/irs-pdf/p5248.pdf>

This version contains yellow highlighting on items that can cause the 990N submission to be rejected.

--A. L. Matysek, 2/8/2017

# 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 e-Postcard login interface. It is divided into two main sections: 'First Time Users' and 'Returning Users'. The 'First Time Users' section includes a message: '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 >'. The 'Returning Users' section includes a message: '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' label, a text input field, and a checkbox labeled 'Mask Username'. At the bottom of the 'Returning Users' section is a blue button labeled 'LOG IN >' and a purple link labeled 'Forgot Username'.


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**



### 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 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** >

### 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 3 of 4: Security Profile

All fields are required.

#### User ID and Password

User ID

Password

Re-enter Password

Primary Email

Enter a User ID of your choice. The User ID cannot be an email address, SSN, or contain a space, or special character (!@#\$\$%^&\*).

Password Rules:

- 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.
- 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**

CANCEL

CONTINUE >

## 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**

## 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**

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 first step, 'e-Postcard Profile', is highlighted. Below the progress bar, it says 'You are logged in as: Exempt Organization' with a link to 'Edit user type'. There is an 'EIN' input field with a placeholder 'XX' and a dropdown menu showing 'XXXXXXXX'. To the right of the input field is a blue button labeled 'ADD EIN'. Below this, there is a section titled 'Currently Associated EIN(s)' with a table that has columns for 'EIN', 'Organization Name', 'Date Added', and 'Delete'. The table is currently empty, with the text 'No EINs are currently associated with your ID' below it. At the bottom of this section are two buttons: 'DELETE EIN' and 'CREATE NEW FILING'.

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

e-Postcard Profile Select EIN Organization Details Contact Information Confirmation

You are logged in as: **Exempt Organization** [Edit user type](#)

EIN   **ADD EIN**

**Currently Associated EIN(s)**

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

**DELETE EIN** **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**.

The screenshot shows the 'Select EIN' page with a progress bar at the top. The second step, 'Select EIN', is highlighted. 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 the text '-Select EIN-' and a downward arrow. Below the dropdown menu are two buttons: 'MANAGE E-POSTCARD PROFILE' and 'CONTINUE'.

Select EIN [Home](#) [Security Profile](#) [Logout](#)

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

**Please select the EIN for which you want to file for**

EIN

**MANAGE E-POSTCARD PROFILE** **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**.

The screenshot shows the 'Organization Details' page, which is the third step in a five-step process. The steps are: e-Postcard Profile, Select EIN, Organization Details (current), Contact Information, and Confirmation. The page title is 'Organization Details' with links for Home, Security Profile, and Logout. The main heading is 'Electronic Notice-Form 990-N (e-Postcard)'. Below this is the section 'Organization Information'. It contains three questions, each with a text input field and a question mark icon for help: 'For the tax year ending', 'Has your organization terminated or gone out of business?', and 'Are your gross receipts normally \$50,000 or less?'.

## 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.

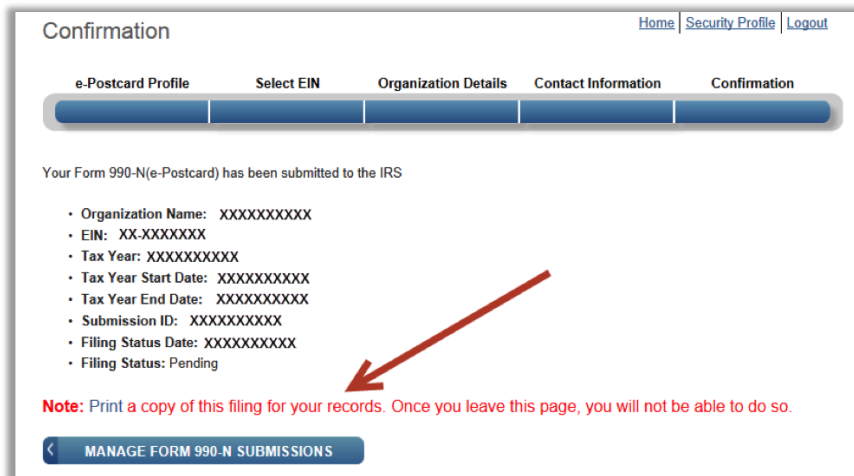
The screenshot shows the 'Contact Information' page, which is the fourth step in a five-step process. The steps are: e-Postcard Profile, Select EIN, Organization Details, Contact Information (current), and Confirmation. The page title is 'Contact Information' with links for Home, Security Profile, and Logout. The main heading is 'Electronic Notice-Form 990-N (e-Postcard)'. Below this is the section 'Organization Address and Principal Officer Information'. It contains two text input fields: 'Organization's legal name:' and 'If your organization conducts business using another name (DBA), enter other name:'. A note below the second field states '\* = required field'. The section is titled 'Organization:' and includes a 'DBA Name' label above the second input field. A question mark icon is present at the end of the DBA Name field.

## 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: XXXXXXXXXX
- EIN: XX-XXXXXXX
- Tax Year: XXXXXXXXXX
- Tax Year Start Date: XXXXXXXXXX
- Tax Year End Date: XXXXXXXXXX
- Submission ID: XXXXXXXXXX
- Filing Status Date: XXXXXXXXXX
- Filing Status: Pending

A red arrow points to the "Filing Status: Pending" line. Below the list, a note reads: "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" with a left-pointing arrow.

## 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