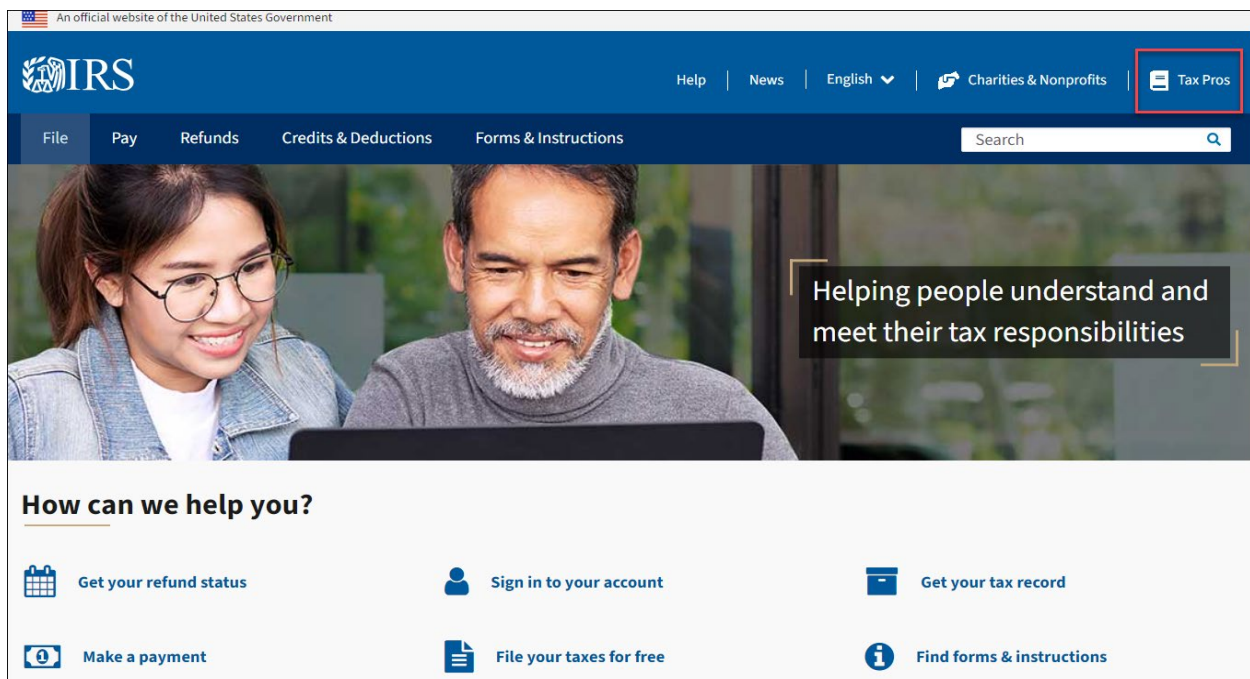


Obtaining an EFIN when the Authorized Representative of the Provider has an Individual Taxpayer Identification Number (ITIN)

Providers may obtain an Electronic Filing Identification Number (EFIN) for use by a firm if the authorized representative (Responsible Official) has an Individual Taxpayer Identification Number (ITIN).

The Provider must submit an IRS e-file application to obtain an EFIN. The Provider must include its firm information including Employer Identification Number (EIN), address, and phone number. The provider must select "Large Taxpayer" as the Provider Option and then select Form 1042 by choosing the first radio button. The Authorized Users will be the Responsible Official(s) with an Individual Taxpayer Identification Number (ITIN). The Primary Contact may be the same as the Responsible Official. Complete the application as shown on the screenshots below.

Access **Tax Pros** from irs.gov



Select Access e-Services



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Enrolled agents

Annual Filing Season Program participants

Enrolled retirement plan agents

Certified Professional Employer Organization (CPEO)

Enrolled actuaries

E-file providers

Modernized e-File



E-Services

Online tools for tax professionals

Access e-Services



Tax Pro Account

Submit POA and TIA, view all your CAF authorizations and withdraw online

Use Tax Pro Account



PTIN system

Renew or register for 2024

Renew or register

Request power of attorney or tax information authorization

Review options to [submit power of attorney \(POA\)](#) or [tax information authorization \(TIA\)](#). Choose from Tax Pro Account, Submit Forms 2848 and 8821 Online, or forms by fax or mail.

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Enrolled agents

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Enrolled retirement plan agents

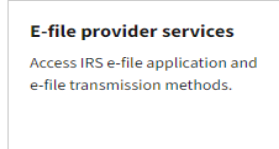
Certified Professional Employer Organization (CPEO)

Enrolled actuaries

E-file providers

Modernized e-File

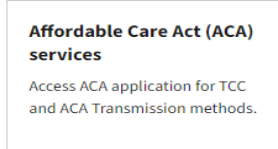
E-Services is a suite of web-based tools for tax professionals, reporting agents, mortgage lenders and payers to transact with the IRS. To access accounts, you must accept the terms of agreement when you sign in.



E-file provider services

Access IRS e-file application and e-file transmission methods.

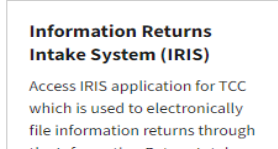
Access e-file services



Affordable Care Act (ACA) services

Access ACA application for TCC and ACA Transmission methods.

Access ACA services



Information Returns Intake System (IRIS)

Access IRIS application for TCC which is used to electronically file information returns through the Information Return Intake System (IRIS).

Access IRIS TCC application

Select Access e-file application



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E-file provider services

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Enrolled actuaries

E-file application

Use our online e-file application to [become an authorized e-file provider](#) or [view and update existing applications](#).

It is only through an approved e-file application that tax professionals, who are [electronic return originators \(EROs\)](#), [Circular 230 practitioners](#), or [reporting agents \(RAs\)](#), can gain access to the Transcript Delivery System. EROs must e-file five or more returns in a tax season to be eligible. Circular 230 practitioners need only apply and be approved.

[Access e-file application](#)

*requires login credentials

Sign In or Create a New Account



Sign In or Create a New Account

 You only need one ID.me account

If you already have an account, don't create a new one. You can use the same ID.me account to sign in to different IRS online services.

IRS now offers a sign-in option with ID.me, which offers access to IRS online services with a secure account that protects your privacy.

ID.me is an account created, maintained, and secured by a technology provider.

If you don't have an ID.me account, you must create a new account.

Sign in with an existing account

[Sign in with ID.me](#)

OR

Create a new account

[ID.me Create an account](#)

To create a new IRS e-file Application choose **Individual**.

 Kurt F. [redacted] | Short ID: VPC [redacted] |

Select Your Organization

Select the organization you will represent in this session. Each item below represents an organization for which you are authorized to perform work. By selecting an organization, you are logging in as an authorized user of that organization and will be able to perform work for only that organization. You may represent yourself by selecting Individual. You may filter organizations to narrow down the choices based on matching text.

Individual
Select "Individual" to represent yourself as an individual. No organization-specific authorizations will be granted.

☒ Individual

Select **e-File Application** from the drop-down.

e-services

Online Tutorials

Mailbox

Modify PIN

Profile

Contact Us

External Services Authorization Management

Welcome to the External Services Authorization Management Web Application. Please select an existing application or create a new application. The application will ask you for information regarding your Firm/Organization and personal information of the users on the application.

New Application

You will have the opportunity to save your application if you do not have all the required information. Once the application is saved, you may come back and revise the application at your convenience. When all of the information is entered, you will be allowed to submit the application for review by the Internal Revenue Service. The IRS will process your application and send you a notification of the application status.

Search

Since you are associated with more than 20 applications, please select "Search" to find the application(s) you are looking for.

NEW APPLICATION

ACA Application for TCC (Forms 1094/1095-B and/or 1094/1095-C)

API Client ID Application

e-File Application

IR Application for TCC (Filing Information Returns Electronically (FIRE))

PBBA Application for TCC (Audited Partnership and Partners)

TIN Match Application

IRS Privacy Policy | Glossary

R-esam-webapp (version 22.7.0+20)

Firm Information

Firm Information is the initial screen displayed when you select 'e-File Application'. All information indicated with an asterisk is required. Only 'Volunteer Organizations' can choose 'None Required' for the 'Tax ID' selection.

The question, 'Do you want your firm/organization contact information posted on the IRS.gov public website?' (ERO Locator), defaults to 'Yes'. If you do not want this posted, select 'No'.

Firm Information

Application Details

Authorized Users

Application Summary

Application Comments

Application Submission

Firm: EIN:
Application Type: e-File Application

Application Status: New Application

Firm Information

Thank you for taking the time to apply for eServices. The application process will ask you for information regarding your Firm/Organization and personal information with regard to the Principals, Responsible Officials and/or Delegates you will be adding to your application. The IRS will compare the information in the "Required Field" with information received from the Social Security Administration and the tax return information you previously filed. Information that you may need will include Taxpayer Identification Number, Legal Names for the Principals, Responsible Officials and the Firm/Organization, Date of Birth, Home Addresses and Enrolled Agent Id numbers.

You will have the opportunity to save your application, if you do not have all the information required, and will be able to come back and revise the application with your information. Once you have input all the required information you will be allowed to submit the application for your review by the Internal Revenue Service (IRS). The IRS will process your application and send you a notification as to the results.

The time it takes to fill out the application can vary by organization and will usually take between 20-45 minutes.

What Tax ID does this firm operate under*

☒ EIN ☐ SSN ☐ Not Required

Business Structure*
Select

Employer Identification Number (EIN)*
- -

Firm/Organization Legal Name*

Doing Business As (Trade/Company Name)

Business Phone

Phone Country Code*
001-United States/Canada

Phone Number*

Business Fax

Fax Country Code
001-United States/Canada

Fax Number

Business Address (Physical Location)

Country*
United States

Address Line 1*

Address Line 2

Address Line 3

City*

Province/State/U.S. Territory*
Select

Postal Code*

Do you want your firm/organization contact information posted on the irs.gov public website?
☒ Yes ☐ No

Do you own or operate Web site(s) through which taxpayer information is collected, transmitted, stored or processed?*

Select

If you own or operate Web site(s) through which taxpayer information is collected, transmitted, stored, or processed, you are required to register your URLs with us.

Mailing Address

Is your mailing address different from your business address
☐ Yes ☒ No

Year-round Address

Is your firm/organization open 12 months of the year
☒ Yes ☐ No

< PREVIOUS

SAVE

CONTINUE >

Cancel

IRS Privacy Policy | Glossary

Add Provider Option Information

Provider options are added by selecting the Provider Option drop-down.

NOTE: When adding a Responsible Official with an Individual Taxpayer Identification Number (ITIN), then you must have a Provider Option of Large Taxpayer and only Forms 1042 and 1120F selected. Choose only the first radio button.

Large Taxpayer - A Large Taxpayer is a Provider Option on the IRS e-file Application, but it is not an Authorized IRS e-file Provider. A Large Taxpayer is a business or other entity with assets of \$10 million or more, or a partnership with more than 100 partners, that originates the electronic submission of its own return(s).

IRS

e-services

External Services A

Firm Information

EFIN Status

Doing Business as

Application Type: e

Application

Provider Option

Select "Add Provide
Electronic Return O
needed.

Showing Items 1 to

Provider Option

Large Taxpayer

Showing Items 1 to

ADD PROVIDER

PREVIOUS

Add Provider Option Information

Please select the Service Type and Potential Business Activity that will be a part of your electronic filing. If required, select the form(s) applicable for your Firm also.

NOTE: If you are adding a Responsible Official with an ITIN, then you must have a Provider Option of Large Taxpayer and only Forms 1042 and 1120F selected.

Required fields are marked with an asterisk (*) and must be completed to submit the form.

Provider Option*
Large Taxpayer

Service Type*
Not for Profit

Type of Business Activity
Large Taxpayer

You are required to select the return/form type you are planning to e-File.

Select One Group of Returns/Form Types*

Forms

- ☒ 1042 - Annual Withholding Tax Return for U.S. Source Income of Foreign Persons
- ☐ 1120F - U.S. Income Tax Return of a Foreign Corporation
- ☐ 1040NR - U.S. Nonresident Alien Income Tax Return
- ☐ 1041 - U.S. Income Tax Return for Estates & Trusts
- ☐ 1042 - Annual Withholding Tax Return for U.S. Source Income of Foreign Persons
- ☐ 1065 - U.S. Return of Partnership Income (1065 and 1065-B)
- ☐ 1120 - Corporate Income Tax Return (1120, 1120-F, 1120-S)
- ☐ 1120POL - U.S. Income Tax Return for Certain Political Organizations
- ☐ 2290 - Heavy Highway Vehicle Use Tax Return
- ☐ 4720 - Return of Certain Excise Taxes on Charities and Other Persons Under Chapters 41 and 42 of the Internal Revenue Code
- ☐ 5227 - Split-Interest Trust Information Return
- ☐ 5330 - Return of Excise Taxes Related to Employee Benefit Plans
- ☐ 7004 - Application for Extension to File (7004)
- ☐ 720 - Quarterly Federal Excise Tax Return
- ☐ 8038CP - Return for Credit Payments to Issuers of Qualified Bonds
- ☐ 8849 - Claim for Refund of Excise Taxes
- ☐ 94x Annual - 94x Annual Employment Tax Returns

SAVE

Cancel

Contact Us

Completed

al tax returns select
er Options if

Page 1 Next

Apply Delete

Page 1 Next

Cancel

K-esam-weoapp (version 24.9.130)

Authorized Users

This screen displays the Authorized Users. To add select the ADD button.

Firms that will be selecting Not for Profit do not need to add Principal or Principal Consent.

Firm Information

Application Details

Authorized Users

Application Summary

Application Comments

Application Submission

EFIN Status

Firm: EIN:

Application Type: e-File Application | Tracking Number:

Application Status: Saved

Authorized Users

Firms that have selected/will be selecting only "Not For Profit"/"Covered Entity" service type DO NOT NEED "to add" the "Principal" or "Principal Consent" role.

Authorized User(s)

< Prev

Page 1

Next >

Role Id	Organization Role	Name	TIN	Position/ Title	Phone/Extension	Notify of Changes	View	Edit	Delete
ADD Principal Principal Consent Responsible Official Delegated User Primary Contact Alternate Contact CONTINUE Cancel									

IRS Privacy Policy | Glossary

R-esam-webapp (version 18.5.14)

Responsible Official

A Responsible Official is an individual with responsibility for and authority over the IRS e-file operation at designated locations. The Responsible Official is the first point of contact with the IRS and has default authorities to view and update the application and add, delete, and change Responsible Officials.

To change the default or add additional authorities of a Responsible Official, select the 'Authorities' at the bottom of the page.

Add Responsible Official

The responsible official is the individual with responsibility and authority over the operations at designated sites. The responsible official is the first point of contact with the IRS, has the authority to sign revised applications, and is responsible for ensuring that all requirements of the IRS e-file program are adhered to. A responsible official may be responsible for more than one office.

You may delegate authorities to individuals, however, by delegating these responsibilities you will still be responsible for this person's actions and activities.

Required fields are marked with an asterisk (*) and must be completed to submit the form.

First Name*

Middle Initial

Last Name*

Suffix

TIN Type*

☐ SSN ☒ ITIN

If you enter the Individual Tax Identification Number (ITIN) for the Responsible Official You may continue but you will be limited to choosing only the 'Large Taxpayer' provider options and Form 1120F.

Individual Taxpayer Identification Number (ITIN)*

Date of Birth (mm/dd/yyyy)*

Position or Title*

U.S. Citizen*

Email Address*

Phone Country Code*

Phone Number*

Extension

☐ Add this person as a Primary Contact

Authorities

You may delegate authorities to individual, however, by delegating these responsibilities you will still be responsible for this person's action and activities.

Please select one or more of the following...

☐	Forms
☒	View Application Information
☒	Update Application Information
☐	Sign & Submit Revised Applications
☐	Add, Delete & Change Principals
☒	Add, Delete & Change Responsible Officials

SAVE

Cancel

Primary Contact

A Primary Contact is required for the application. Complete the Primary Contact section with the required information unless you selected 'Add this person as a Primary Contact' on the Principal or Responsible Official page. A Primary Contact is a person who will be available daily to answer IRS questions regarding this application and any processing issues throughout the year. Complete the required information and click 'SAVE'.

Add Primary Contact

Please enter a Primary Contact who will be available on a daily basis to answer IRS questions regarding this application and any processing issues throughout the year. A Primary Contact is required for all applications.

Required fields are marked with an asterisk (*) and must be completed to submit the form.

First Name*	Middle Initial	
Last Name*	Suffix	
Position or Title*		
Email Address*		
Phone Country Code*	Phone Number*	Extension
Fax Country Code	Fax Number	

SAVE

Cancel

Application Submission

When you have completed the application process and all required information has been entered, you must SUBMIT the application for review and approval by the IRS.

Enter your five-digit Personal Identification Number (PIN) from the initial registration, check the Terms of Agreement (TOA) box, and select 'SUBMIT'. Only a Principal or designated Responsible Official can submit the application.

e-services	Online Tutorials	Mailbox	Modify PIN	Profile	Contact Us
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Firm Information	Application Details	Authorized Users	Application Summary	Application Comments	Application Submission
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EFIN Status

Doing Business as Name: GEORGE JETSON'S E-SERVICE SPECIAL | EIN: 20-
Application Type: e-File Application | Tracking Number: 20220526094
Application Status: Saved

Application Submission

You have completed the application process and all required information has been entered. You are now able to submit this application for review and approval by the IRS.

This firm and employees will comply with all of the provisions of the Revenue Procedure for Electronic Filing of Individual Income Tax Returns and Business Tax Returns, and related publications, for each year of our participation. Acceptance for participation is not transferable. I understand that if this firm is sold or its organizational structure changes, a new application must be filed. I further understand that noncompliance will result in the firms and/or the individuals listed on this application, being suspended from participation in the IRS e-file program. I am authorized to make and sign this statement on behalf of the firm.

Please enter your PIN to accept the terms for this application. Your PIN is your electronic signature that you selected when you registered.

PIN*

☐ I accept the Terms of Agreement

[< PREVIOUS](#) [SUBMIT](#) [Cancel](#)

Modify PIN

To modify an existing e-Services Personal Identification Number (PIN), select the Modify PIN tab located at the top of the screen. Create a five-digit PIN and submit. This PIN can then be used to sign the e-file application.

e-services	Online Tutorials	Mailbox	Modify PIN	Profile	Contact Us
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e-services PIN

e-services requires each user to have a Personal Identification Number (PIN) to be used to sign your e-file, TIN Matching, IVES and ACA applications. Please enter a five digit PIN (cannot be all the same digits) in the field below and click the submit button.

Required fields are marked with an asterisk (*) and must be completed to submit the form.

PIN*

Confirm PIN*

[SUBMIT >](#) [Cancel](#)