

INSTRUCTIONS FOR FILING IRS 990-N EPOSTCARD – **NEW USERS**

**Use these instructions if you do not know how to log in to your chapter's IRS account.
Keep this information in your 990-N File for future use.**

The 990-N is your chapter's tax return. It is NOT optional. The penalty for not filing is revocation of your chapter's non-profit status, resulting in the reorganization of the chapter by the IRS. Use these instructions to create an account for your chapter IF you don't have the log in credentials created by a former chapter treasurer. For your convenience you will find a worksheet on the last page of this document for recording the new user information. **Please file July-September so that if you have problems we can help.**

Helpful hints:

- If the IRS site is not working in the Internet browser that you are using, try a different one. (Example: Internet Explorer, Google Chrome, Mozilla Firefox, Safari)
- Use a computer (not a smart phone) that is **not** connected to a shared network.
- Check your junk/spam folders if you are not receiving expected emails during the registration or filing process.
- Use the question mark links at the end of each field if you need clarification.
- If the system freezes and won't let you proceed, sign out of the filing system, close all programs and shut down the computer. In a few minutes, restart your computer and sign in to the IRS site to try again.
- IRS Technical Help can be reached at 877-829-5500.

Steps to file:

1. Go to www.irs.gov/990N
Scroll down to the next-to-last section **Ready to File?** Click the link provided.
2. When you are **ready to begin** have the following information available:
 - Treasurer's name, email address, and mailing address
 - EIN (employer identification number) for your chapter – this can be found on Form 18 that you get from International
3. **Register as a first-time user – 3 steps**
Use the last page of this document to record the information.
 - Enter the treasurer's name and email address
 - The IRS will send a confirmation code to that email.
Have your email open as the code will expire in 15 minutes.
 - Create your User Profile. This is only time you will have to do this.

4. Electronically file your 990-N – 6 steps

- Click MANAGE E-POSTCARD PROFILE
- Select EXEMPT ORGANIZATION at the drop-down arrow
- Enter your EIN, then click ADD EIN, then click CREATE NEW FILING
- Select the EIN at the drop-down arrow and click CONTINUE
- Complete the information on the next 2 screens:
 - **TAX YEAR ENDING – June 30 of the FY that just closed – if there is a different date don't continue – call International – 512-478-5748 (Phyllis Hickey)
 - **Select NO (your organization has not gone out of business) at the drop-down arrow
 - **Select YES (your gross receipts are \$50,000 or less) at the drop-down arrow
 - **The LEGAL NAME and EIN should already be filled in
 - **Enter YOUR CHAPTER NAME as the DBA name (doing business as)
 - **Enter the ADDRESS FOR THE ORGANIZATION (chapter treasurer's information is fine) then enter the TREASURER'S NAME AND CONTACT information for the Principal Officer
- SAVE OR SUBMIT the filing
 - Saving lets you go back later and fill in any fields that you left blank
 - Submitting sends the filing to the IRS

5. Confirmation: Accepted or Rejected – 3 steps

- On the initial confirmation page click PRINT at the bottom of the message and print the page indicating that your submission is *pending*
- Wait 5-10 minutes then click MANAGE FORM 990-N SUBMISSIONS
 - **You will see past submissions showing ACCEPTED as well as this years with the STATUS OF PENDING
 - **In the ACTION BOX, click GET UPDATED STATUS and the Status box will change to ACCEPTED OR REJECTED.
- Print this page or use the Submission ID link to get more details and print that page
 - **Keep the “accepted” page in your files
 - **If your status is Rejected, contact International at 512-478-5748 for assistance and then notify TSO HQ at 972-930-9945 or tsotreas@sbcglobal.net

6. No need to send “proof of acceptance” to TSO HQ. We have the ability to check your chapter's status online -- but **you need to keep a copy of the acceptance for your files.**

Keep this information in your 990-N File for future use

IRS 990N ePostcard Profile Information Worksheet

Keep this information in your 990-N File for future use

Chapter: _____

EIN#: _____

First -time user confirmation code: _____

User Name: Create a username that future treasurers can easily remember.

Password: Create a password that future treasurers can easily remember. (Be sure to read the IRS password requirements on that page.)

Site Phrase: _____ Site Image _____

Challenge Questions

- 1. _____ Answer: _____
- 2. _____ Answer: _____
- 3. _____ Answer: _____
- 4. _____ Answer: _____

Year	Person Filing	Contact Info Email or Cell #	Acceptance	
			Received	Sent to TSO