

IRS e-Services Registration Process

What is e-Services?

- Suite of products designed for tax professionals and taxpayers to do business with IRS electronically
- Includes:
 - Registration
 - *e-file* Application
 - Preparer Tax Identification Number (PTIN) Application
 - Tax Identification Number (TIN) Matching Application
 - *e-filing* “Incentive” Products
- Accessed through a secure environment known as the “Registered User Portal (RUP)”

Why do I have to register?

- **Doing business as an individual representing yourself or your corporation**
- **IRS needs to authenticate you**
- **Authentication achieved by:**
 - **Providing “shared secrets” to corroborate your identity (combination of name, Social Security Number, Date of Birth and Adjusted Gross Income from current or one previous tax year)**
 - **Further authentication by mailing a registration confirmation number to your official IRS address of record (from your latest return filed)**

How do I register?

- **Go to IRS.gov**
- **Click the “Tax Professionals” tab**
- **Click the “e-Services for Tax Pros” link on the left side under Tax Professionals Topics**
- **Click the “Registration Services” link**

Here’s the direct web link:

<http://www.irs.gov/taxpros/article/0,,id=109646,00.html>

Start at www.IRS.gov



SEARCH

Advanced Search Search Tips

- Individuals
- Businesses
- Charities & Non-Profits
- Government Entities
- Tax Professionals
- Retirement Plans Community
- Tax Exempt Bond Community

I need to file my tax return

>>

I need to pay my tax bill

>>

I've got a

Click the "Tax Professionals" Tab

Forms & Pubs

- W-4
- W-9
- 1040
- 941
- 4506-T
- 5695
- 1040X
- 1040-ES
- W-8BEN
- 2848

+ More...

Hot Topics

- Sign up for a PTIN
- e-file My Return for Free
- Affordable Care Act Tax Provisions
- Airline Ticket Taxes Reinstated
- Next Highway Use Tax Return Not...

+ More...

Tools

- Check on Your Refund
- Order a Tax Return or Account Transcript
- Apply for an Employer Identification Number (EIN) Online

+ More...

Filing & Payment



News

IRS Shows Continued Progress on International Tax Evasion

IRS Issues Guidance on Tax Treatment of Cell Phones; Provides...

Treasury, IRS Seek Public Input on Certain Employer Provisions...

IRS Offers Filing and Penalty Relief for 2010 Estates; Basis...

+ More...

- Health Care Credit
- Disaster Relief
- Offshore Disclosure
- Exemption Revoked
- Help for Taxpayers



2011 Voluntary Disclosure Information on the initiative is available for taxpayers and preparers.

Frequently Asked Questions Answers to issues related to offshore voluntary disclosure.

How to Make a Voluntary Disclosure Those who want a voluntary disclosure arrangement may contact the IRS.

Social Media



Small Business Health Care Tax Credit Update



Resolve an Issue

- Appealing a Tax Dispute
- Responding to a Notice
- Taxpayer Advocate Service
- Disaster Relief

Gather & Protect Info

- Privacy & Security
- Reporting Phishing
- Identity Theft
- Freedom of Information Act
- Tax Stats

Visit Other Sites

- U.S. Treasury
- USA.gov
- Whitehouse.gov
- Treasury Inspector General for Tax Administration

Access Other Formats

- Accessibility
- Other Languages

Work at IRS

- Careers
- Equal Employment Opportunity
- Contracting Opportunities



Tax Information for Tax Professionals

Tax Professionals Topics

- [PTIN Requirements](#)
- [Basic Tools for Tax Pros](#)
- [News & Events](#)
- [Circular 230 Tax Pros](#)
- [Code, Reqs & Guidance](#)
- [e-Services for Tax Pros](#)
- [Appeals](#)
- [More Topics ...](#)

Click
"e-Services for Tax Pros"

Important!

All paid preparers must register with the IRS and obtain a PTIN.



[LEARN MORE >>](#)

New regulations require all paid tax return preparers to obtain a PTIN. Renewals for 2012 are expected to start in October 2011. In the future, some preparers will need to pass a competency test and background check, and take continuing education courses. Check back for more guidance soon.

IRS Resources

- [Compliance & Enforcement](#)
- [Contact My Local Office](#)
- [e-file](#)
- [Forms and Publications](#)
- [Newsroom](#)
- [Frequently Asked Questions](#)
- [Taxpayer Advocate Service](#)
- [Where To File](#)

[New e-file Requirement for Tax Return Preparers](#)

In addition to the new PTIN requirement, you may be required to e-file in 2011. Learn more about how IRS is phasing in new e-file legislation for tax return preparers.

[IRS Letters and Visits to Return Preparers - Filing Season 2011](#)

During the 2011 tax filing season, the Internal Revenue Service continues its efforts to ensure paid tax return preparers are assisting clients appropriately.

[IRS Training and Communication Tools for Tax Professionals](#)

Follow IRS on Twitter, attend a Tax Forum, and watch tax videos - learn about it here!

[IRS Live](#)

IRS Live is for the tax pro in the know. A live webinar, IRS Live is a panel discussion among IRS experts and industry professionals aimed at educating tax professionals on the most current and complex tax issues affecting them and their clients.

e-services - Online Tools for Tax Professionals

Tax Professionals Topics

- [PTIN Requirements](#)
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Already Registered? [Login](#) Not Yet Registered or Confirmed? [Registration Services](#)

**Click
"Registration Services"**

e-Services is a suite of web-based products that will allow tax professionals and payers to conduct business with the IRS electronically. These services are available 24 hours a day, 7 days a week via the internet.

e-Services is not available to the general public. Only approved IRS business partners as noted below, are eligible to participate in e-Services.

All **tax professionals** who register are eligible to use the following e-Services:

- Registration
- Online *e-file* Application

Electronic Return Originators (ERO) who have e-filed five or more accepted returns are eligible to use these incentive products:

- Disclosure Authorization (DA)
- Electronic Account Resolution (EAR)
- Transcript Delivery System (TDS)

Note: Effective November 1, 2007, all **Circular 230 Practitioners** who qualify as Attorneys, Certified Public Accountants, or Enrolled Agents will have unlimited access to the incentive products listed above whether they e-file their client returns or not. Click here for [FAQs](#) and [instructions](#) on how to apply or for answers to frequently asked questions.

Reporting Agents who are accepted IRS *e-file* providers, are eligible to use the following Reporting Agent e-Services products:

- Electronic Account Resolution (EAR)

Blue headings contain navigation links. Don't use your browser back or forward arrows while in a secure session



[e-services](#)

[On-line Tutorials](#)

[Help](#)

[Mailbox](#)

Registration Services

services

[Registration](#)

[Confirm Registration](#)

[Revise Registration](#)

[Change Password/PIN](#)

[Expired, Forgotten or Lost Password or PIN](#)



Welcome to Registration Services

Click "Registration"

[Registration](#)

Here you can register to become a user of the Internal Revenue Service's (IRS) e-services web site. Our registration process involves collecting personal and taxpayer data for the sole purpose of authenticating your identity. The IRS will compare the information you provide with the information received from the Social Security Administration (SSA) and with the tax return information you previously filed. We will issue a registration confirmation code to you via the U.S. Postal Service, if the information you provide matches our data. You must log back into the e-services web site within 28 days of your registration submission and enter this confirmation code to complete the registration process.

We ask you to provide the following information to become a registered user:

- Legal name (verified with IRS & SSA records)
- Social Security Number (verified with SSA records)
- Date of birth (verified with SSA records)
- Telephone number
- E-mail address
- Adjusted Gross Income (AGI) from either your current year or prior year filed tax return (verified from IRS records)
- Username. Select your preferred username. Please read the rules for selecting your username
- Password and PIN. Select your password and PIN. Please read the helpful hints on selecting a



Registration

Please enter the following information to register for using e-services.
For help, select the *Help* link and information will be provided in a "help" window.

IMPORTANT: Please print a copy for your records *before* you submit your entries for processing.

*First Name (Required):

Middle Initial:

*Last Name (Required):

Name Suffix:

*Tax Identification Number (Required):

*Date of Birth (Required): (MM/DD/YYYY)

Phone: (3 digit area code followed by 7 digit number, i.e. 8005551111)

Phone Country Code: (Enter 001 for US)

Email Address:

Follow the field construct for Date of Birth and Phone Number.

Please provide your **Adjusted Gross Income (AGI)** from your most recent individual income tax return, Form 1040, 1040A, etc. Your AGI amount must agree with what was submitted on your original return prior to any corrections or amendments. We suggest using your AGI from the prior year if your most recent return is filed after November 1, please use your AGI of the prior year.

Choose one of the available tax years and enter your AGI.

*Tax Year Ending Dec 31 (Required):

*AGI (Required): Whole dollars only

Use you Adjusted Gross Income from your current or previous tax year. The drop down menu shows three years to allow for early filers in the new tax year.

Please select your preferred Username, Password and Personal Identification Number (PIN).
(You must type password and PIN twice)

Rules governing the creation of the Username, Password, and PIN have been created to further enhance the security of e-services.
The most commonly encountered rules are identified below. [Select this link to see the full set of password and PIN rules.](#)

*Username (Required):

Username must be at least 8 characters long, may contain letters and numbers only, case insensitive (read as upper-case only).

*Password (Required):

Password must be at least 8 characters long, must contain both letters and numbers, case sensitive, cannot be the same as the username.

*Re-Enter Password (Required):

*PIN (Required):

PIN must be 5 digits only, cannot be all the same digits.

*Re-Enter PIN (Required):

Please select one question to be answered by you if you forget your username and you attempt to re-register with IRS. The question and answer should be unlikely to be known by other individuals. For example, do not select your street where you currently live or the car you own today.

*Question to Recover Username (Required):

*Answer (Required):

The last address you provided the IRS on your individual tax return used to send you a registration confirmation number. You may use this address for your registration. Upon confirmation of your registration, we will update your address. If you are a secondary taxpayer on a joint return, we will not update the address.

Has your taxpayer address changed as explained above? If yes, you must enter your new address in the fields below.

Warning! Completing these fields will change your address.

Address Line:

City:

State (USA Only):

Zip Code:

Country:

Follow the rules provided to construct your Username and Password. Your Password is case sensitive. Write down your Username, Password, Recovery Question and PIN and keep them in a secure location – Never share your information with others or allow them to use your information.

Your password expires every 180 days. Your PIN does not expire but it is a good idea to change it periodically.

Please select your preferred Username, Password and Personal Identification Number (PIN).
(You must type password and PIN twice)

Rules governing the creation of the Username, Password, and PIN have been created to further enhance the security of e-services.
The most commonly encountered rules are identified below. [Select](#)

*Username (Required):

*Password (Required):

*Re-Enter Password (Required):

*PIN (Required):

*Re-Enter PIN (Required):

Please select one question to be answered by you if you file a return. The question and answer should be unlikely to be known by others who currently live or the car you own today.

*Question to Recover Username (Required):

*Answer (Required):

With e-Services Registration, you are able to change your official address of record with IRS. If you have moved since your last filing with IRS and have not notified us of the changes, select "Yes" here and complete your new address. Note: Your confirmation code letter will be sent to your **OLD** address of record and should be forwarded by the Post Office to your new address.

The last address you provided the IRS on your individual tax return, Form 1040, or your most recent Change of Address, Form 8822, will be used to send you a registration confirmation number. You must provide us with your current home address if it has since changed. Upon confirmation of your registration, we will update your taxpayer home address under your SSN only. If you last filed as a secondary taxpayer on a joint return, we will not update the address information under the primary SSN on the account.

Has your taxpayer address changed as explained above? Yes No

If yes, you must enter your new address in the fields below. If no, proceed to terms and conditions.

Warning! Completing these fields will change your address of record with the IRS.

Address Line:

City:

State (USA Only):

Zip Code:

Country:

Terms and Conditions

Please read the following Privacy Act and conditions of use that explain why we are requesting the registration information, how it will be used, and your responsibilities as a registered user of e-services. After reading, please select the *Accept* button to continue your registration.

If you do not accept the presented Terms and Conditions, you will not be granted access to e-services. The registration information you entered will then be deleted and you will be returned to the e-services welcome page.

Privacy Act Notice:

The Privacy Act of 1974 requires that when we ask individuals for information about themselves, we state our legal right to ask for the information, why we are asking for the information, and how it will be used. We must also tell you what could happen if we do not receive all or part of the information, and whether your response is voluntary, required to obtain a benefit, or mandatory.

Our legal right to ask for information is 5 U.S.C. 301 and the Internal Revenue Code Sections 6001, 6011, 6012 and applicable regulations. The registration information we are requesting is used to create an e-services account for you and authenticate your identity, in other words, to ensure you are who you say you are. The information may not be disclosed except as provided by Section 6103 of the Internal Revenue Code. We may give the information to the Department of Justice and to other Federal agencies, as provided by law. We may also give it to cities, states, the District of Columbia and U. S. commonwealths or possessions to carry out their tax laws. We may give it to foreign governments because of tax treaties they have with the United States. Your participation in the e-services program is voluntary. As such, your responses to any of the registration questions are entirely voluntary. However, if you do not provide all or part of the information required to create your account and authenticate your identity, you will not be eligible for access to e-services.

Paperwork Reduction Act Notice:

The collection of information contained in e-services has been reviewed and approved by the Office of Management and Budget in accordance with the Paperwork Reduction Act (44 U.S.C. 3507) under control number 1545-1823. An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless the collection of information displays a valid control number. Books or records relating to a collection of information must be retained as long as their contents may become material in the administration of any internal revenue law. Generally, tax returns and return information are confidential, as required by 26 U.S.C. §6103. The following table identifies the estimated length of time to complete the various e-services processes. This includes the time it will take to read the instructions, gather the necessary facts and enter the required information.

Read and understand the Terms and Conditions of Registration.

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e-services Product	OMB Number	Estimated Time to Complete
Registration to e-services	1545-1823	20 minutes
Required Password Maintenance	1545-1823	20 minutes
Forgotten Password Maintenance	1545-1823	20 minutes
TIN Matching Application	1545-1823	20 minutes
TIN Matching Interactive Session	1545-1823	10 minutes
Bulk TIN Matching	1545-1823	10 minutes
Form 8633 - Application to Participate in the IRS e-file Program	1545-0991	1 hour
Electronic Account Resolution	1545-1823	20 minutes
Disclosure Authorization System Form 2848-Power of Attorney and Declaration of Representative	1545-0150	Recordkeeping 26 minutes
	1545-0150	Learning about the law or the form 9 minutes
	1545-0150	Preparing the form 26 minutes
Disclosure Authorization System Form 8821-Tax Information Authorization	1545-1165	Recordkeeping 7 minutes
	1545-1165	Learning about the law or the form 12 minutes
	1545-1165	Preparing the form 24 minutes
Transcript Delivery System Form 4506-T-Request for Copy of Transcript of Tax Form	1545-1872	Recordkeeping 13 minutes
	1545-1872	Learning about the law or the form 6 minutes
	1545-1872	Preparing the form 11 minutes

to hear from you. You can write the Internal Revenue Service Tax Forms Committee, Western Area Distribution Center, Rancho Cordova, California 95743-0001.

Your Registration Obligations:

As an e-services user, you agree to provide true, accurate, current and complete information about yourself as prompted by the registration process and that you will maintain and promptly update this data to keep it true, accurate, current and complete. If you provide any information that is untrue, inaccurate, obsolete or incomplete, or there are reasonable grounds to suspect that such information is untrue, inaccurate, obsolete or incomplete, the IRS has the right to suspend or terminate your account and refuse any and all current or future use of e-services.

Member Account, Password and Security:

As part of the registration process, you selected a username, password and PIN. You are responsible for maintaining the confidentiality of this information. While it may be necessary to disclose your username or PIN to an IRS employee or other individual, you agree not to disclose your password to anyone. You are fully responsible for all activities that occur under your password. IRS personnel do not have access to your password and should never ask you for it. You agree to immediately notify the IRS at 1-866-255-0654 (international callers use 512-416-7750) of any unauthorized use of your password or account, or any other breach of security and ensure that you exit from your account at the end of each session.

Limited Usage Agreement:

I agree that the IRS may deny me access to any or all electronic services, products and/or applications, at both the individual or business entity level, in the event IRS becomes aware of any activity that constitutes or appears to constitute misuse or abuse of any electronic services, products or applications.

If you do not accept the presented Terms and Conditions, you will not be granted access to e-services. The registration information you entered will then be deleted and you will be returned to the e-services welcome page.

You may do either of the following:

- Select *Accept* to submit all your entries.
- Select *Decline* to discard all your entries.

Accept

Decline

Click "Accept" to submit your registration.

Within 7 – 10 days, you will receive a letter containing a confirmation code from the IRS via U.S. Postal Mail. This will be sent to your official address of record.

How do I confirm my registration?

- **Go to IRS.gov**
- **Click the “Tax Professionals” Tab**
- **Click “e-Services for Tax Pro” link**
- **Click on the “Registration Services” link**



Tax Professionals Topics

- [PTIN Requirements](#)
- [Basic Tools for Tax Pros](#)
- [News & Events](#)
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- [e-Services for Tax Pros](#)
- [Appeals](#)
- [More Topics ...](#)

IRS Resources

- [Compliance & Enforcement](#)
- [Contact My Local Office](#)
- [e-file](#)
- [Forms and Publications](#)
- [Newsroom](#)
- [Frequently Asked Questions](#)
- [Taxpayer Advocate Service](#)
- [Where To File](#)

e-services - Online Tools for Tax Professionals

Already Registered? [Login](#) *Not Yet Registered or Confirmed?* [Registration Services](#)

Click "Registration Services"

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e-Services is not available to the general public. Only approved IRS business partners as noted below, are eligible to use e-Services.

All **tax professionals** who register are eligible to use the following e-Services:

- Registration
- Online *e-file* Application

Electronic Return Originators (ERO) who have e-filed five or more accepted returns are eligible to use the following e-Services:

- Disclosure Authorization (DA)
- Electronic Account Resolution (EAR)
- Transcript Delivery System (TDS)

services

[Registration](#)

[Confirm Registration](#)

[Revise Registration](#)

[Change Password/PIN](#)

[Expired, Forgotten or Lost
Password or PIN](#)



Click "Confirm Registration"

Welcome to Registration Services

Registration

Here you can register to become a user of the Internal Revenue Service's (IRS) e-services web site. Our registration process involves collecting personal and taxpayer data for the sole purpose of authenticating your identity. The IRS will compare the information you provide with the information received from the Social Security Administration (SSA) and with the tax return information you previously filed.

Confirm Registration: Select this option to enter the confirmation code you received from the IRS. You should only have to complete this process once (if you ever forget your password or PIN, you will need to repeat this process).

Revise Registration: Selecting this option will allow you to revise the information in your Registration record, such as, name, telephone number, address, and e-mail address.

Change Password/PIN: Use this option to change your password, PIN or both.

Forgotten or Lost Password or PIN: Allows you to request a new confirmation code to reset your password if you've forgotten or lost your password. If your password has expired you may login through the Login link on the e-Services home page with the expired password and you will be prompted to change it once you've entered your AGI and PIN.

Please have this information available before you continue on to the registration process. Thank you.

Login

Username

Password

Enter the
Username
and
Password
you created
when you
registered.

[Not registered? Register here](#)

FORGOT YOUR PASSWORD?

If you have forgotten your password, or your password is not working for some reason, [click here](#) to get a new one. You will need your username, name, SSN, date of birth, and shared secrets used in the original registration.

NOTICE: The IRS reserves the right to deny access to any or all electronic services, products and/or applications, at both the individual or business entity level, in the event IRS becomes aware of any activity that constitutes or appears to constitute misuse or abuse of any electronic services, products or applications.

WARNING! You are using an Official United States Government System, which may be used only for authorized purposes. Unauthorized modification of any information stored on this system may result in criminal prosecution. The Government may monitor and audit the usage of this system, and all persons are hereby notified that the use of this system constitutes consent to such monitoring and auditing. Unauthorized attempts to upload information and/or change information on these web sites are strictly prohibited and are subject to prosecution under the Computer Fraud and Abuse Act of 1986 and Title 18 U.S.C. Sec. 1001 and 1030.



Confirm Registration

To complete your registration, please enter your confirmation code as it appears in the letter you received by mail.

Please note: You must perform this process once after you register and again if you request a Forgotten Password or PIN.

*Confirmation Code (Required):

 -

You may do the following:

- Select *Submit Request* once you type in your confirmation code

Submit Request

Enter the 12-character confirmation code (combination of letters and numbers) you received in the mail from IRS.

Note: You must confirm your registration within 28 days of your initial registration – if not, you will have to register again.

For security reasons, e-services passwords expire every 180 days.

15 days prior to expiration of your e-services password, the system will advise you when you log in.

10 days prior to expiration of your e-services password, IRS will send you an email.

Set your own reminder to log in to e-services and change your password if you did not provide an email address during registration.

Login

Username
Password

If you have forgotten your password, you will need to go through the "Forgotten Password" link and wait for a confirmation code.

If your password expires and you still remember it, you may login using your expired password and you will be prompted to enter your AGI and PIN, You will then be prompted to change your password.

FORGOT YOUR PASSWORD?

If your password is not working for some reason, [click here](#) to get a new one. You will need your username, name, and address for registration.

Use of this system constitutes consent to the use of all electronic services, products and/or applications, at both the individual or business entity level, and constitutes or appears to constitute misuse or abuse of any electronic services, products or applications.

This system is a Government System, which may be used only for authorized purposes. Unauthorized use of this system may result in criminal prosecution. The Government may monitor and audit the usage of this system, and your use of this system constitutes consent to such monitoring and auditing. Unauthorized attempts to upload information to this system are prohibited and are subject to prosecution under the Computer Fraud and Abuse Act of 1986 and Title 18 U.S.C. Sec. 1001 and 1030.

M5 Hotfix 892841
Installed

Eondata

ERAP Dial-Up Connection

ERAP47.exe

Kelley 11386.pdf

Kelley Leave Slip.pdf

Calculator

HP LaserJet 4

NetMeeting

PowerPoint

Shortcuts

Adobe Acrobat 6.0
Professional

RUP

Microsoft Outlook

Access

XP5CB on
NCT001MA2617652

EUP

Creating an icon on your desktop will provide easier access to e-Services. It's a good reminder to periodically logon to e-Services to see if your password may be expiring.

My Network Places

My Documents

Cisco VPN Client

IP release-renew

Recycle Bin

Registration Summary

- **Registration is a one-time authentication of you as an individual that allows you to do business with IRS electronically**
- **Confirm your registration within 28 days of the initial registration**
- **Reset your password when prompted by the system when you log in or by an e-Services e-mail (or set a reminder if you don't have e-mail)**
- **Keep your Username, Password, Recovery Question and PIN in a secure location and do not share this information**

The IRS e-Help Desk can assist you with any questions on the e-Services' Registration Process.

1-866-255-0654