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# **Instructions for Filing the Form 990N e-Postcard**

On the next several pages, you will find step-by-step instructions for filing the IRS Form 990N e-Postcard. Please note the following:

- Ignore Figures 5, 10, and 12 in the packet.
- In Figure 11, you are not asked the amount of receipts. Just check “yes” where it asks if receipts are less than \$50,000.
- In Figure 14, use the “president’s” name as the principal officer.
- If your council closes its books in May, this form must be filed before October 15.
- If your council closes its books in June, this form must be filed before November 15.

Contact Sandy Erickson, Local 571 treasurer, if you have any questions or concerns. Sandy can be reached at 630/816-0152 or [sandraerickson1@mac.com](mailto:sandraerickson1@mac.com).

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# IRS Form 990-N e-Postcard Quick Start

## Chapter 1: Steps for filing an e-Postcard

To file an e-Postcard you must perform the following step:

1. Register with the [epostcard.form990.org](http://epostcard.form990.org) website as either an **Exempt Organization** or **Preparer**.
  - Register as an **exempt organization** if you will only be completing the 990-N for your organization.
  - Register as a **preparer** if you expect to help multiple organizations. For example, a **preparer** can be a paid preparer, such as a CPA, or a volunteer aiding exempt organizations at a local library. By registering as a **Preparer**, you can use your login to register as many organizations as you wish.
2. Respond to the activation email sent during the registration process.
3. Complete and submit the e-Postcard for an exempt organization.

## Chapter 2: Getting Started

The e-Postcard website is designed to display in Microsoft Internet Explorer for Windows, Version 5.5 or higher, or Mozilla Firefox at a screen resolution of 1024 x 768 pixels.

**Important!** You will be required to enter an email address during the registration process. You must make sure that your email filters will allow email from [epostcard@urban.org](mailto:epostcard@urban.org) to be received.

### Registration information needed

To register with the [epostcard.form990.org](http://epostcard.form990.org) website you will need the following information:

1. Are you registering as an **Exempt Organization** or are you registering as a **Preparer**.
2. If registering as an exempt organization, you will need the Employer Identification Number (EIN) for the exempt organization.

**Important!** The exempt organization submitting an e-Postcard filing must be registered with the IRS. See the [Annual Electronic Filing Requirement for Small Exempt Organizations — e-Postcard \(Form 990-N\)](#) website for further information on qualifying as an organization that can submit an e-Postcard filing. You need the EIN used when registering the organization with the IRS.

3. Preparers need to provide a Login ID.

**Note:** Login IDs are automatically generated for exempt organizations.

4. Preparers need to provide a business name.

**Note:** The organization name is used for an exempt organization. It is the name for the EIN as registered with the IRS.

5. Password
6. Your first and last name
7. Your email address

**Note:** The email address is used to activate the registration and to communicate status information about filings. It is not transmitted to the IRS.

8. Daytime telephone

### e-Postcard information needed

**Important!** The exempt organization's fiscal year for the year they are filing must be over before filing an e-Postcard. The IRS determines the filing year using the beginning date of the fiscal period. If your fiscal period begins February 1, 2007, you will not be able to file for the 2007 filing year until February 1, 2008.

1. Employer Identification Number (EIN) for the exempt organization filing the e-Postcard.

Note: The EIN is automatically determined for an exempt organization registration. A preparer must provide an EIN for the e-Postcard they are filing.

2. Is the exempt organization terminated or going out of business (Yes or No)?
3. Are the exempt organization's gross receipts normally ~~\$25,000~~ <sup>\$50,000</sup> or less (Yes or No)?

**Does**  
**Not**  
**Apply**

~~Important! If the exempt organization is a supporting organization, the limit is \$5,000 or less.~~

~~4. Supporting organizations must also answer the following question. Do you support only religious organizations (Yes or No)?~~

~~Important! The exempt organization must answer Yes to 3 and 4 (4 for supporting organizations only) to file an e-Postcard.~~

5. One or more other (DBA – doing business as) names used by the organization.
6. Organization's mailing address
7. Organization's website address (if the organization has a website)
8. Principal Officer's name and address.

Note: For certain exempt organizations, this name may be a business name.

## Chapter 3: Accessing the website

The e-Postcard Front-End application is accessed at the <http://epostcard.form990.org> URL. Upon accessing the URL, the Home web page is displayed. Figure 1 shows the web page.

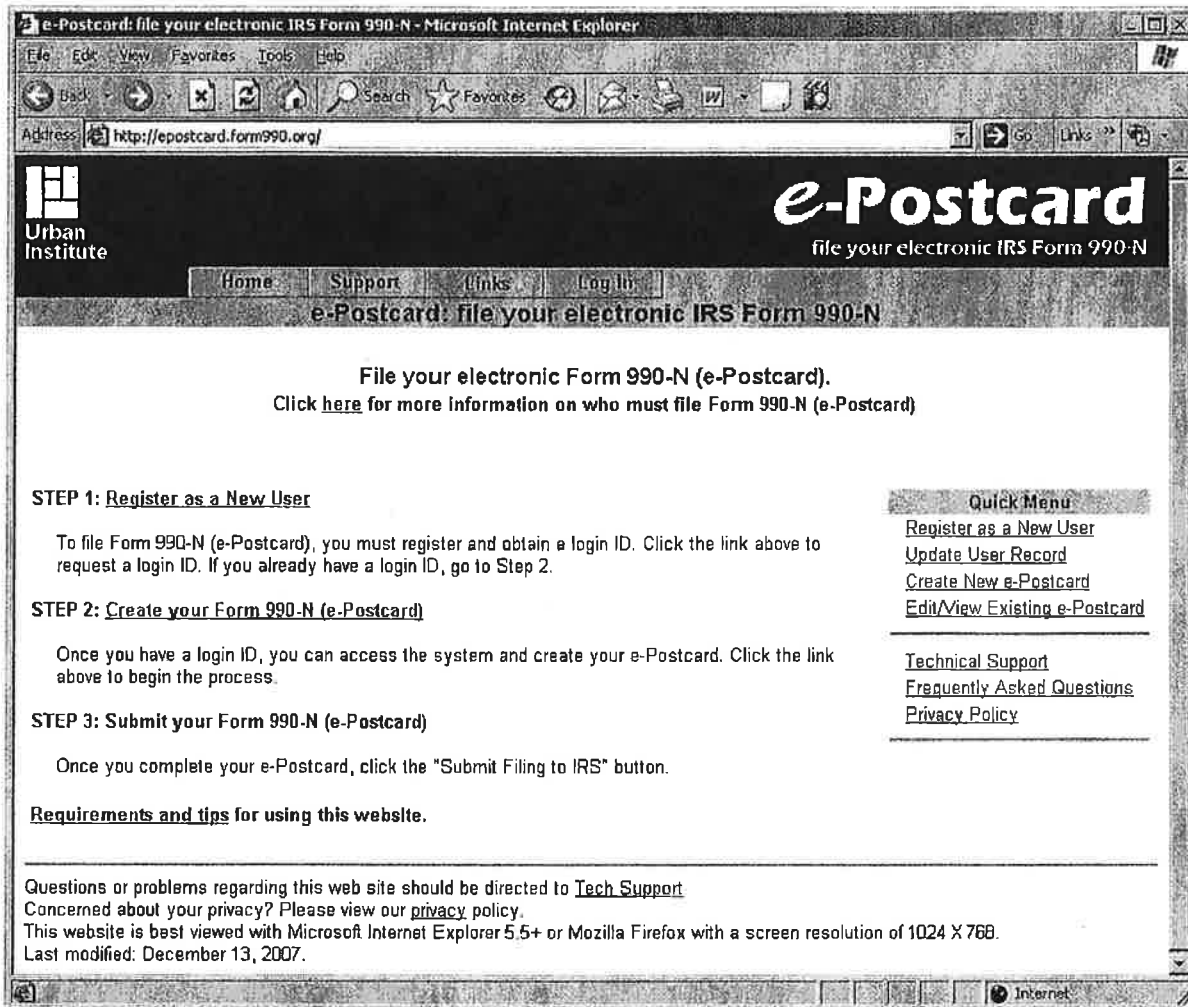


Figure 1. Home web page

The normal steps in submitting an e-Postcard filing to the IRS are:

1. To register as a new user.
2. Create a new e-Postcard filing and
3. Submit the filing.

The following chapters explain these steps.

## Chapter 4: Registering with the website

Click **Step 1: Register as a New User**

Figure 2 shows the Request Login ID (page 1) web page.

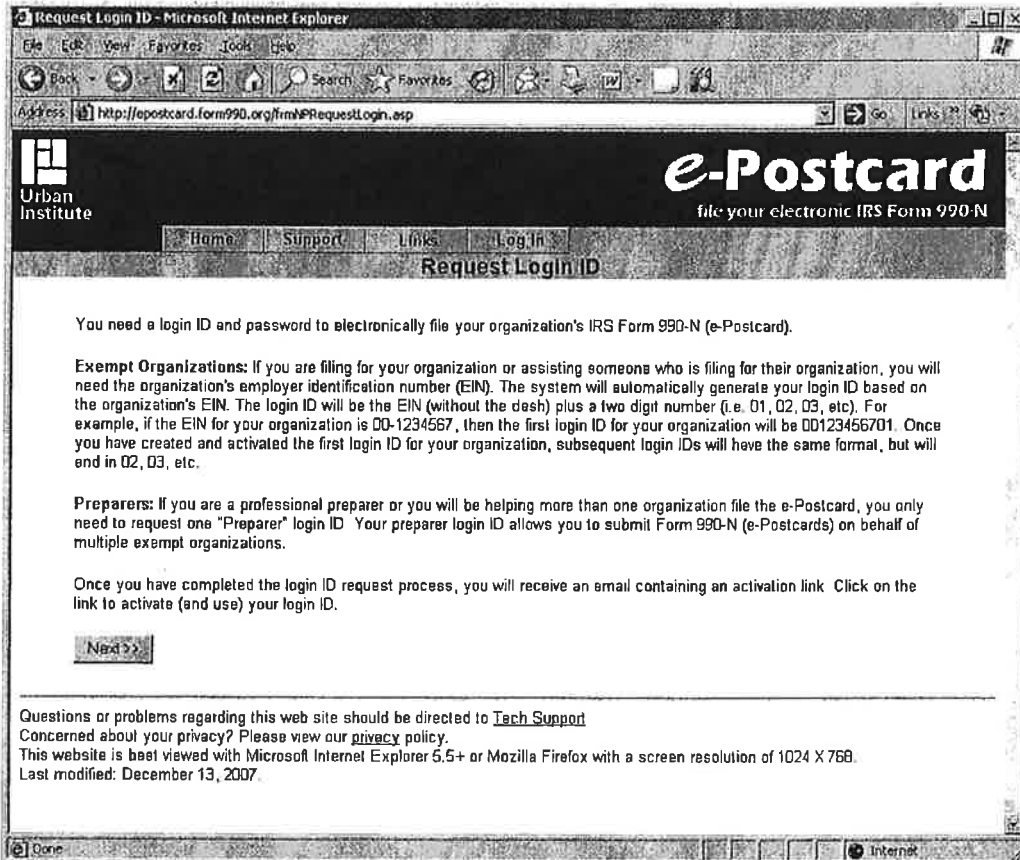


Figure 2. Request Login ID (page 1) web page

Click the **Next>>** button.

Figure 3 shows the Request Login ID (page 2) web page.

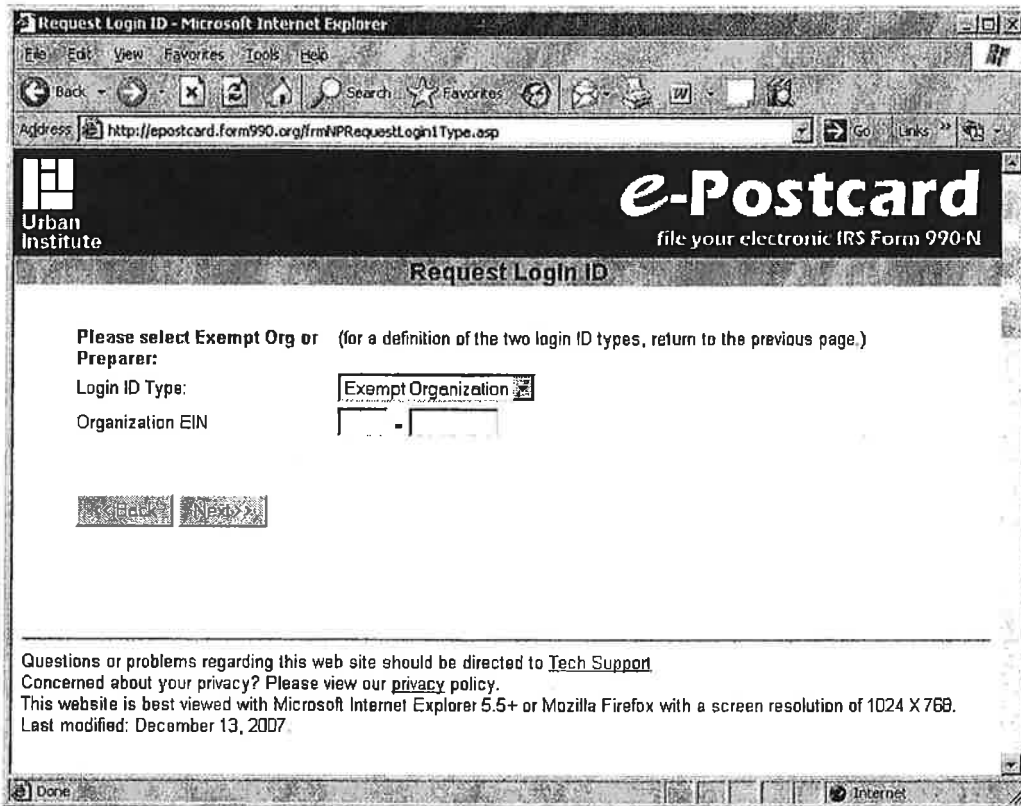


Figure 3. Request Login ID (page2) web page

Select if you are registering as an **Exempt Organization** or as a **Preparer**.

If you are registering as an Exempt Organization, enter your EIN.

Click the **Next>>** button.

Figure 4 shows the Request Login ID (page 3) web page for an **Exempt Organization**.

The screenshot shows a Microsoft Internet Explorer browser window with the title "Request Login ID - Microsoft Internet Explorer". The address bar displays the URL "http://e-postcard.form990.org/firm#RequestLogin2Info.Aspx". The page header includes the Urban Institute logo and the "e-Postcard" logo with the tagline "file your electronic IRS Form 990 N". The main heading is "Request Login ID".

Please enter the following information and then click the 'Next' button (All fields are required.)

Login ID Type:	<b>Exempt Organization</b>
Login ID:	<b>11900002501</b>
Organization Name:	<b>SUPPORTING ORGANIZATION INC</b>
Password:	<input type="text"/> NOTE: Password must be between 6 and 15 characters and is case sensitive.
Verify Password:	<input type="text"/>
First Name:	<input type="text"/>
Last Name:	<input type="text"/>
Email Address:	<input type="text"/>
Verify Email Address:	<input type="text"/>
Daytime Phone:	<input type="text"/>

At the bottom of the form area, there are two buttons: "Back" and "Next".

Questions or problems regarding this web site should be directed to [Tech Support](#)  
Concerned about your privacy? Please view our [privacy policy](#).  
This website is best viewed with Microsoft Internet Explorer 5.5+ or Mozilla Firefox with a screen resolution of 1024 X 768.  
Last modified: December 13, 2007.

Figure 4. Request Login ID web page for an Exempt Organization



Figure 5 shows the web page for a Preparer.

Request Login ID - Microsoft Internet Explorer

Address: <http://epostcard.form990.org/frmRequestLogin2Info.Aspx>

Urban Institute **e-Postcard**  
file your electronic IRS Form 990-N

**Request Login ID**

Please enter the following information and then click the 'Next' button (All fields are required.)

Login ID Type: **Preparer**

Login ID:  NOTE: Login ID must be between 6 and 15 characters and CANNOT contain any spaces.

Preparer Business Name:  NOTE: If you do not have a business name, enter your first and last name.

Password:  NOTE: Password must be between 6 and 15 characters and is case sensitive.

Verify Password:

First Name:

Last Name:

Email Address:

Verify Email Address:

Daytime Phone:

<< Back Next >>

Questions or problems regarding this web site should be directed to [Tech Support](#)  
Concerned about your privacy? Please view our [privacy policy](#).  
This website is best viewed with Microsoft Internet Explorer 5.5+ or Mozilla Firefox with a screen resolution of 1024 X 768.  
Last modified: December 13, 2007.

Figure 5. Request Login ID (page 3) web page for a Preparer

Enter the requested information and click the **Next>>** button.

The information you enter is validated. Any errors are reported and you need to fix them. When all data is valid, an activation email is sent to the email address you provided.

**Important!** You must make sure that your email filters will allow email from [epostcard@urban.org](mailto:epostcard@urban.org) to be received.

Figure 6 shows the Request Login ID – Success web page.

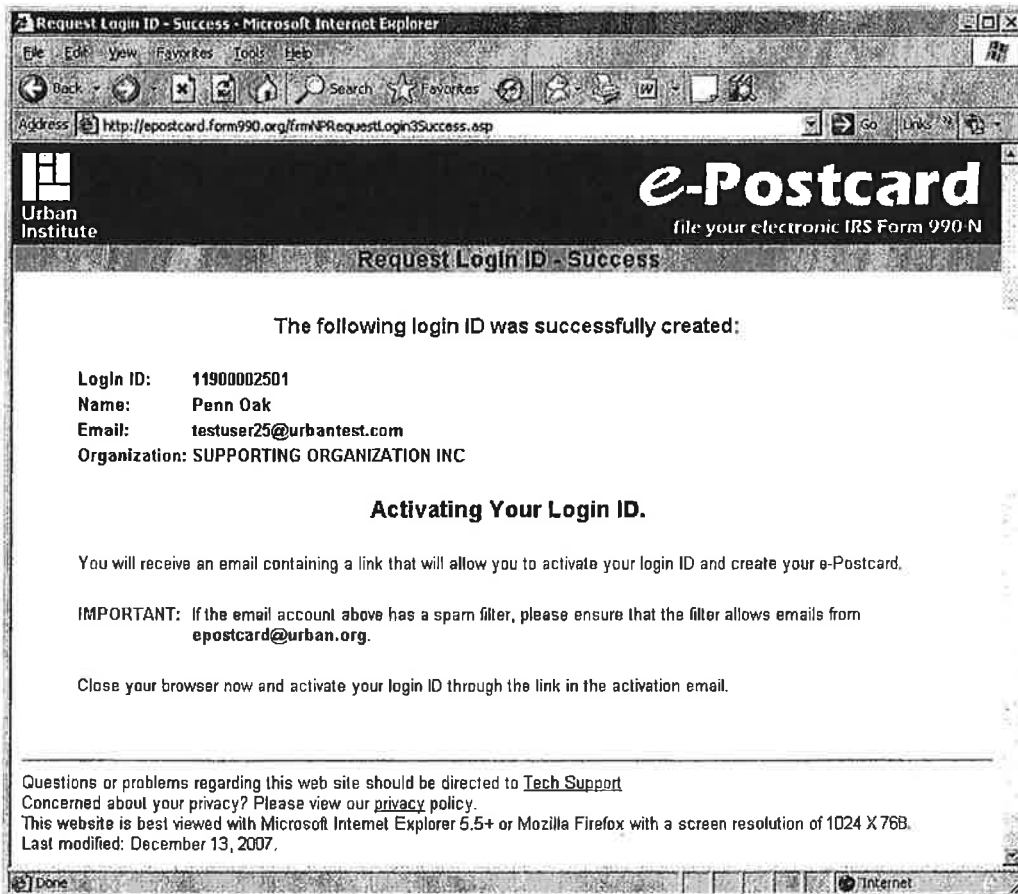


Figure 6. Request Login ID (page 4) web page

Close your web browser and wait for the activation email to arrive.

Figure 7 shows a sample of the Activation Email.

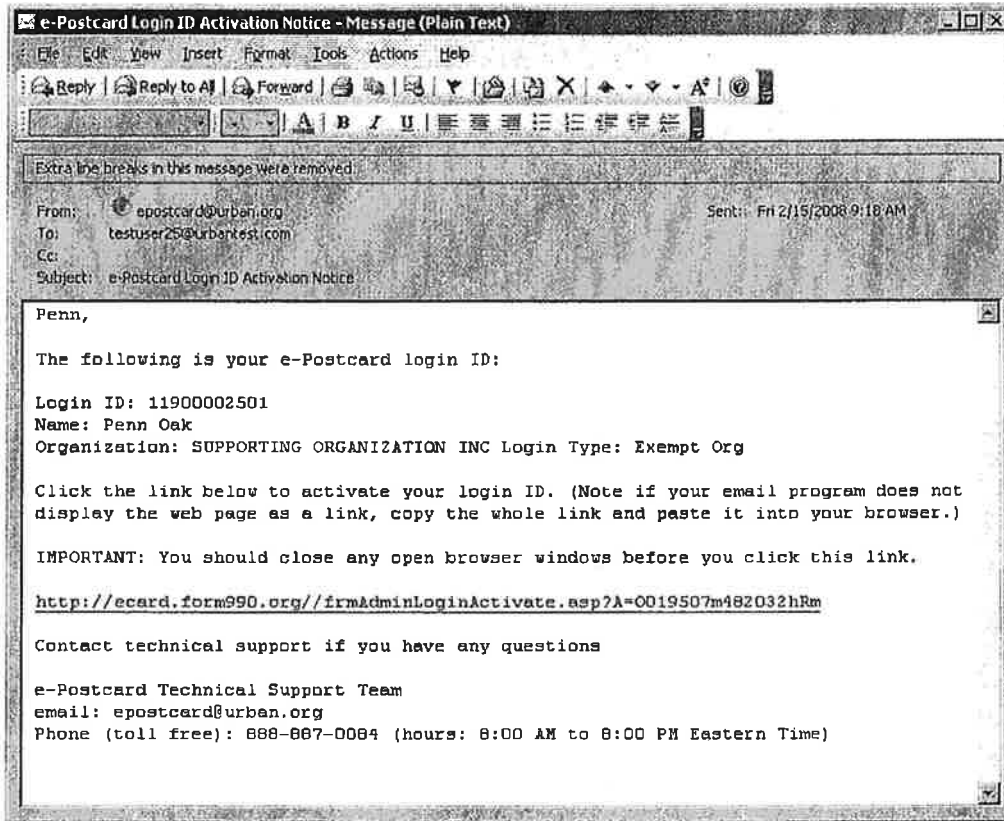


Figure 7. e-Postcard Login ID Activation Notice

Click the link in the email to return to [efile.form990.org](http://efile.form990.org) and activate your Login ID.

**Important!** Some email user interfaces can be configured to turn off links in the email. You should have links enabled to easily return to the website to activate your Login ID. Alternatively, you may cut and paste the link into your web browser. The link must be sent exactly as provided.

When you click on the link in the e-Postcard Login ID activation notice email, you are sent to the Activate Login ID web page. Figure 8 shows the web page.

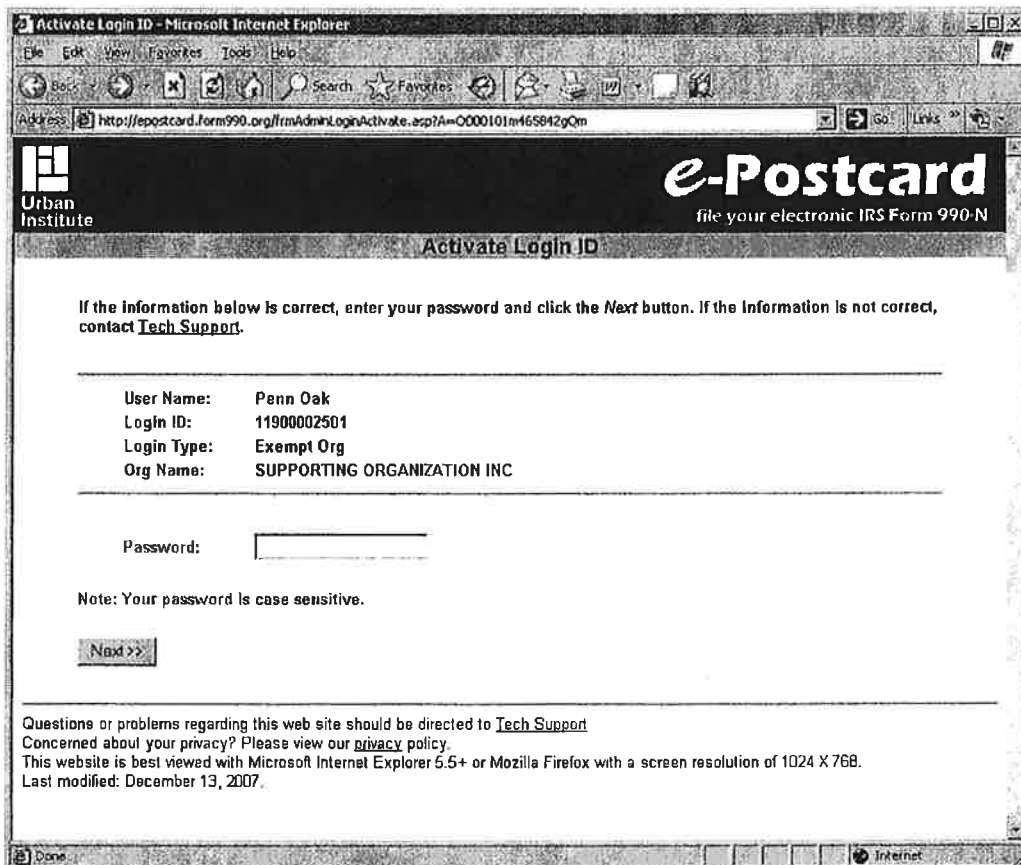


Figure 8. Activate Login ID web page

Enter the password you entered during the registration process.

Click the **Next>>** button.

The Activate Login ID (Success) web page is displayed. Figure 9 shows the web page.

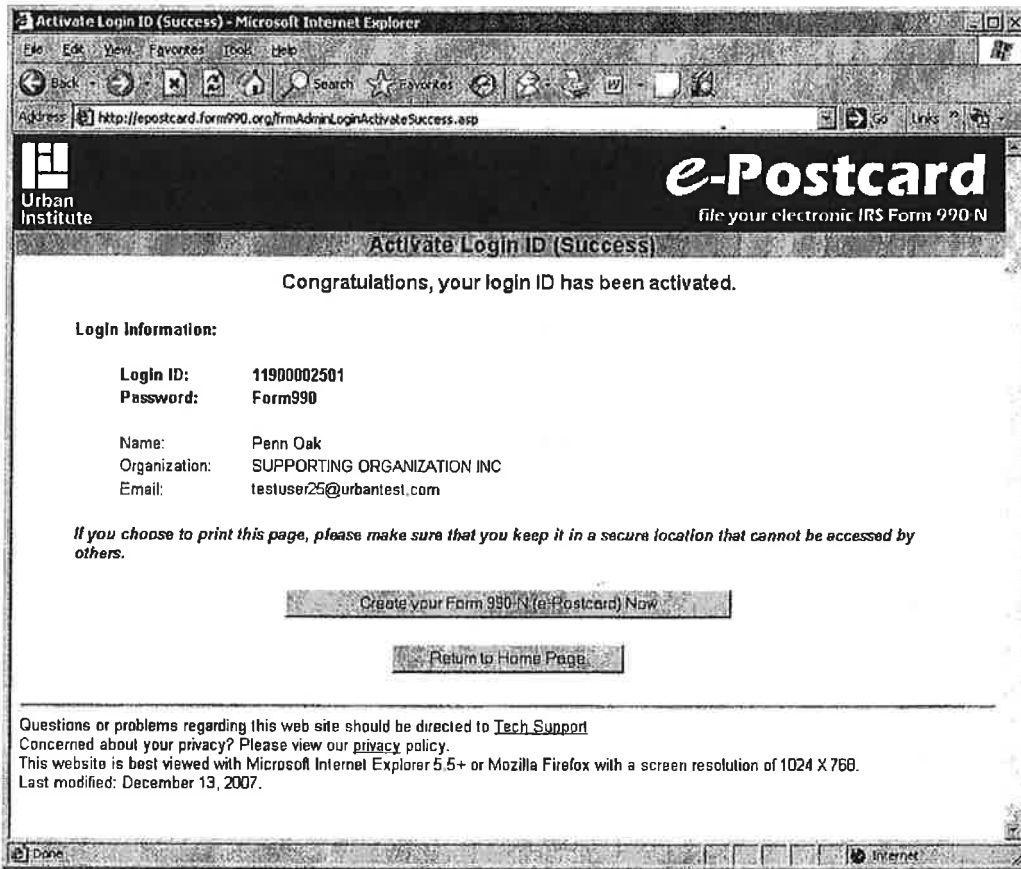


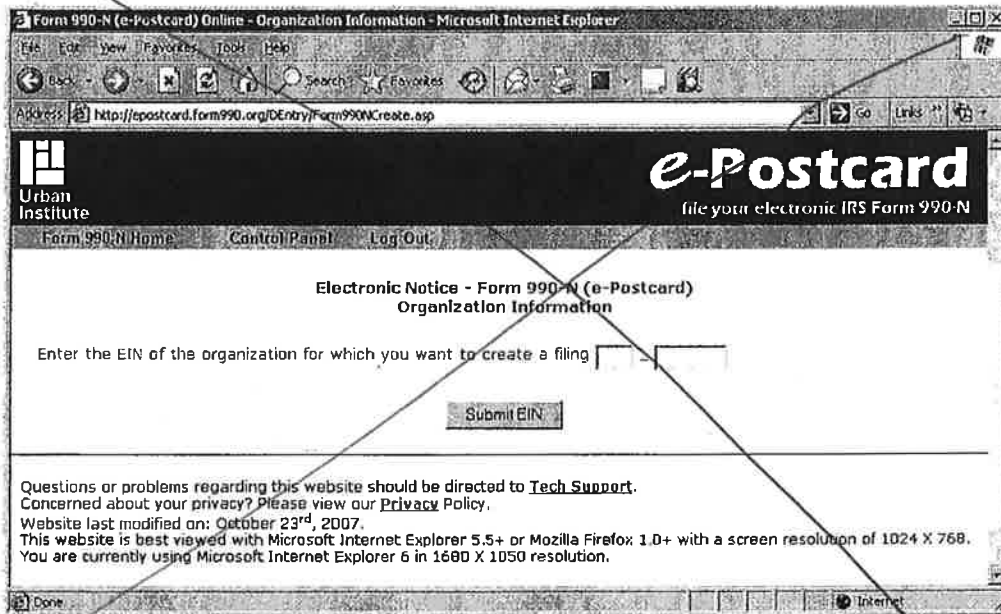
Figure 9. Activate Login ID (Success) web page

Click the **Create your Form 990-N (e-Postcard) Now** button to create a new e-Postcard filing.

## Chapter 5: Entering a new e-Postcard filing

When you click **Create your Form 990-N (e-Postcard) Now** button on the **Activate Login ID (Success)** web page, you start entering the e-Postcard information.

If you are a Preparer, the web page shown in Figure 10 is displayed.



The screenshot shows a web browser window titled "Form 990-N (e-Postcard) Online - Organization Information - Microsoft Internet Explorer". The address bar shows "http://epostcard.form990.org/DEntry/Form990NCreate.asp". The page header includes the Urban Institute logo and the text "e-Postcard file your electronic IRS Form 990-N". Below the header, there are navigation links: "Form 990-N Home", "Control Panel", and "Log Out". The main content area is titled "Electronic Notice - Form 990-N (e-Postcard) Organization Information" and contains the instruction "Enter the EIN of the organization for which you want to create a filing" followed by a text input field and a "Submit EIN" button. At the bottom, there is a footer with the following text: "Questions or problems regarding this website should be directed to [Tech Support](#). Concerned about your privacy? Please view our [Privacy Policy](#). Website last modified on: October 23<sup>rd</sup>, 2007. This website is best viewed with Microsoft Internet Explorer 5.5+ or Mozilla Firefox 1.0+ with a screen resolution of 1024 X 768. You are currently using Microsoft Internet Explorer 6 in 1680 X 1050 resolution."

Figure 10. Create a new e-Postcard filing – Preparer EIN entry

If you are a preparer, enter the EIN for the organization that is filing the e-Postcard and click the **Submit EIN** button. You are then taken to the web page shown in Figure 11 or Figure 12.

If you are registered as an exempt organization, you are taken directly to the page shown in Figure 11 or Figure 12.

The screenshot shows a web browser window titled "Form 990-N (e-Postcard) Online - Organization Information - Microsoft Internet Explorer". The address bar shows "http://e-postcard.form990.org/DEntry/Form990NCreate.asp". The page header includes the Urban Institute logo and the text "e-Postcard file your electronic IRS Form 990-N". Below the header, there are navigation links: "Form 990-N Home", "Control Panel", and "Log Out". The main content area is titled "Electronic Notice - Form 990-N (e-Postcard) Organization Information". It contains several form fields with question marks for help:

- A For the tax year period beginning  and ending
- B Has your organization terminated or gone out of business?
- Are your gross receipts normally \$25,000 or less?
- C Organization's legal name - Line 1
- Organization's legal name - Line 2
- D Employer identification number (EIN)

At the bottom of the form area, there are two buttons: "Cancel Filing" and "Next Page". Below the buttons, there is a note: "Click the image next to any field for help/instructions." At the very bottom of the page, there is a footer with the following text: "Questions or problems regarding this website should be directed to [Tech Support](#). Concerned about your privacy? Please view our [Privacy Policy](#). Website last modified on: October 23<sup>rd</sup>, 2007. This website is best viewed with Microsoft Internet Explorer 5.5+ or Mozilla Firefox 1.0+ with a screen resolution of 1024 X 768. You are currently using Microsoft Internet Explorer 6 in 1680 X 1050 resolution."

**Figure 11. Create a new e-Postcard filing – exempt organizations other than 509(a)(3) Supporting Organizations**

**Important!** The exempt organization's fiscal year for the year they are filing must be over before filing an e-Postcard. The IRS determines the filing year using the beginning date of the fiscal period. If your fiscal period begins February 1, 2007, you will not be able to file for the 2007 filing year until February 1, 2008. The system uses the exempt organization's information registered with the IRS to determine your fiscal year. You need to contact the IRS if the fiscal year is different.

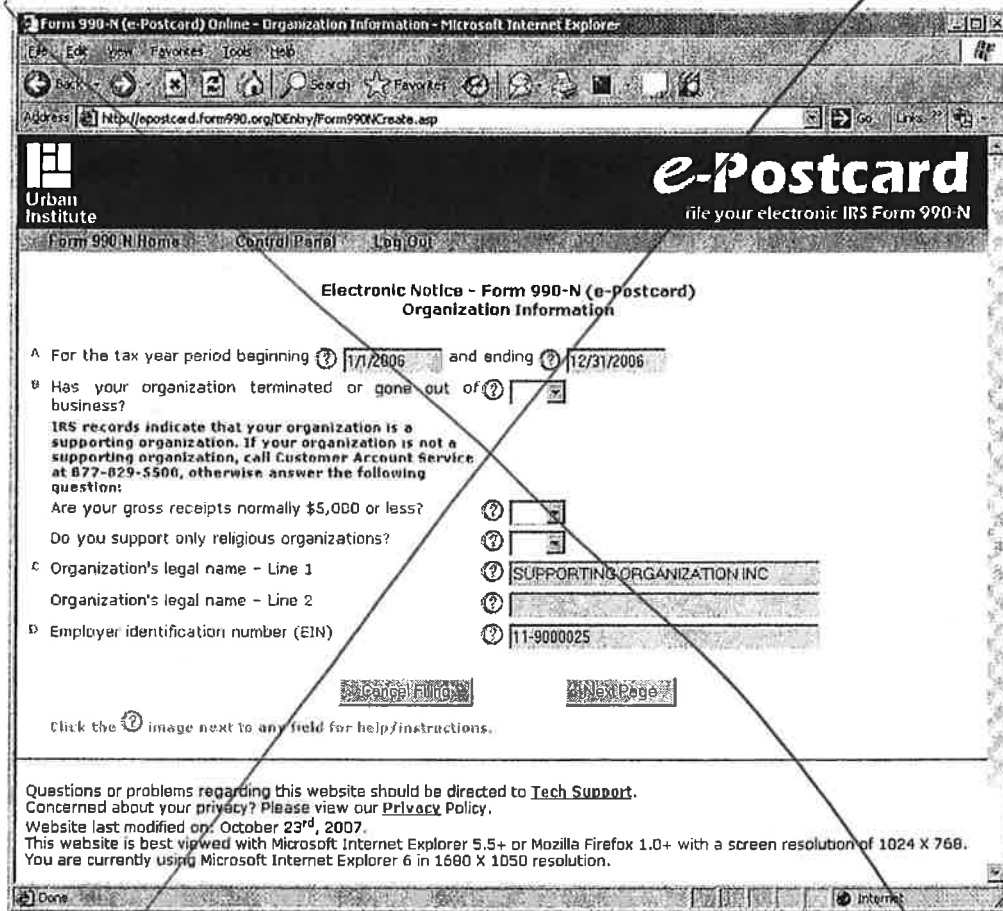


Figure 12. Create a new e-Postcard filing – 509(a)(3) Supporting Organizations

Enter the requested information and click the Next Page button.



The second page of the e-Postcard entry is displayed. Figures 13 and 14 show this web page.

The screenshot shows a Microsoft Internet Explorer browser window displaying the 'e-Postcard' website. The page title is 'Form 990-N (e-Postcard) Online - Organization Address and Principal Officer Information Page'. The address bar shows the URL: <http://epostcard.form990.org/Entry/Form990N4inPartII.asp>. The page header includes the Urban Institute logo and the text 'e-Postcard file your electronic IRS Form 990-N'. A navigation bar contains 'Quick Jump', 'Form 990-N (e-Postcard)', and 'Logout'. The main content area is titled 'Electronic Notice - Form 990-N (e-Postcard) Organization Address and Principal Officer Information'. Below the title, there is a 'Save Changes before jumping to another page.' message and a 'Save Changes' button. The form fields are as follows:

- Organization's legal name:** SUPPORTING ORGANIZATION INC
- If your organization conducts business using another name (dba), enter other name:**
  - DBA name: [?]
  - DBA name - continued: [?]
- Organization's mailing address:**
  - Country: [?] United States
  - Number and street (or PO Box) - Line 1: [?]
  - Number and street (or PO Box) - Line 2: [?]
  - City or town: [?]
  - State: [?]
  - Zip code: [?]
- Organization's website address, if applicable:** [?]

Figure 13. Organization Address and Principal Officer Information (Edit Filing (page 2)) web page

Form 990-N (e-Postcard) Online - Organization Address and Principal Officer Information Page - Microsoft Internet Explorer

Address: http://epostcard.form990.org/DEntry/Form990MainPartII.asp

Number and street (or PO Box) - Line 1

Number and street (or PO Box) - Line 2

City or town

State

Zip code

Organization's website address, if applicable

Principal Officer:

Type of name: Person

Person Name

Country: United States

Number and street (or PO Box) - Line 1

Number and street (or PO Box) - Line 2

City or town

State

Zip code

Previous Page Save Changes Submit Filing to IRS

Click the ? image next to any field for help/instructions.

Questions or problems regarding this website should be directed to [Tech Support](#).  
 Concerned about your privacy? Please view our [Privacy Policy](#).  
 Website last modified on: October 23<sup>rd</sup>, 2007.  
 This website is best viewed with Microsoft Internet Explorer 5.5+ or Mozilla Firefox 1.0+ with a screen resolution of 1024 X 768.  
 You are currently using Microsoft Internet Explorer 6 in 1680 X 1050 resolution.

Figure 14. Edit Filing (page 2) web page (continued)

Enter the requested information and click the **Submit Filing To IRS** button.

The Form 990-N (e-Postcard) Submitted web page is displayed. Figure 15 shows this web page.

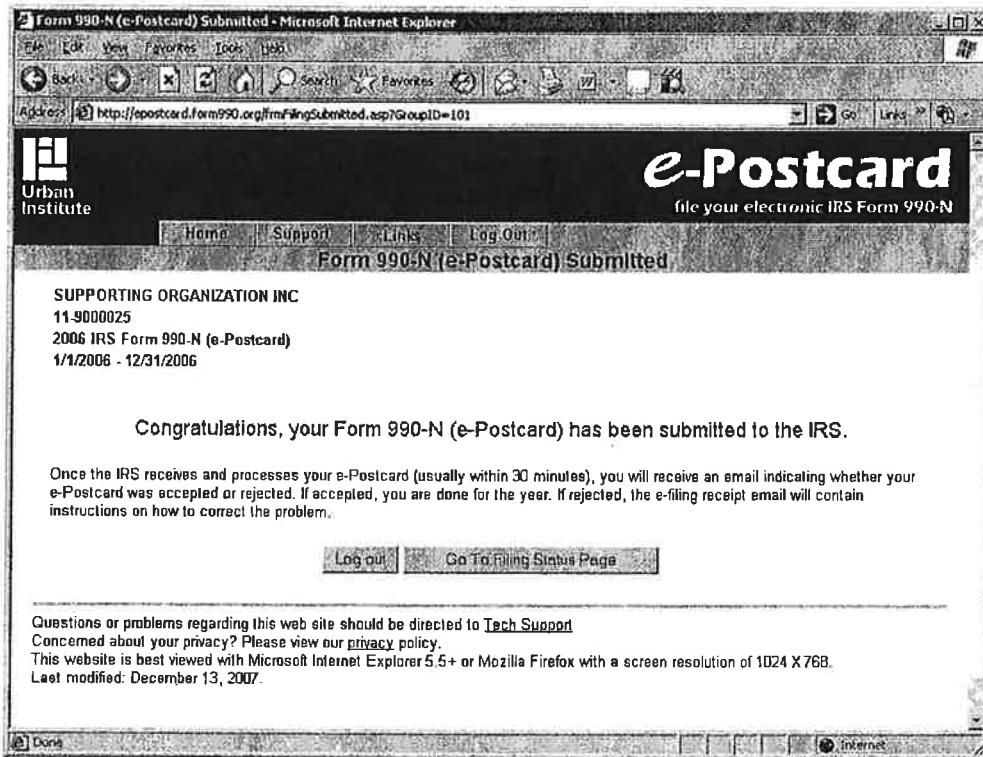


Figure 15. Form 990-N (e-Postcard) Submitted web page

This completes your filing process.

At this point, the e-Postcard filing has been queued for transmission to the IRS. This process usually takes ten to fifteen minutes. You are sent an email notifying you of the results of this transmission. Figure 16 shows a sample accepted email.

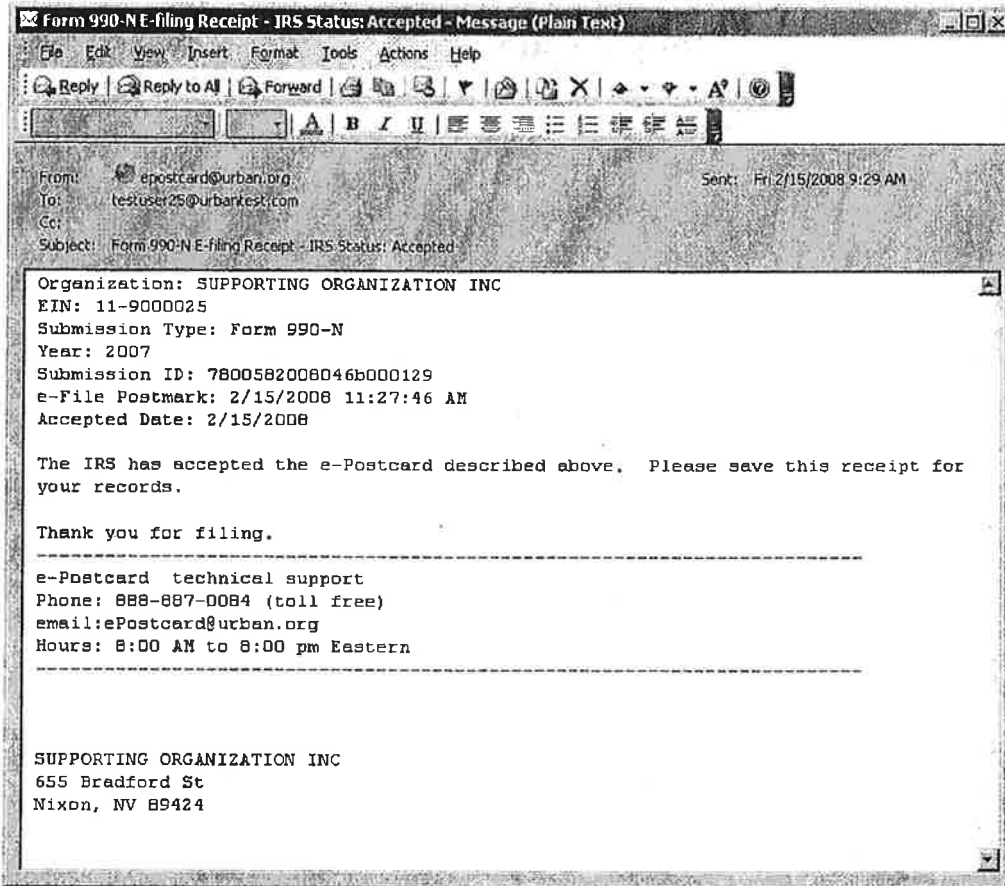


Figure 16. Form 990-N e-Filing Accepted email