



A step-by-step guide

Getting Ready to Use IRS e-file

Before you begin e-filing...

Apply to become an Authorized IRS e-file Provider by completing Form 8633, Application to Participate in the IRS e-file Program and mailing it to the IRS Andover Submission Processing Center (ANSPC). Form 8633 is inside Publication 3112, the IRS e-file Application Package, available by calling 1-800-829-3676, or download the form from www.irs.gov. For assistance in completing the form, call 1-866-255-0654 (toll-free) to speak with an IRS representative.

Applications are accepted August through May, and approval generally takes 45 days. IRS will assign to you an EFIN (Electronic Filing Identification Number) after processing your application and completing the suitability screening process.

Read Publication 1345, Handbook for Authorized IRS e-file Providers of Individual Income Tax Returns. New e-filers automatically receive copies of this document, which contains Revenue Procedure 2000-31 and other official guidance.

Choose a software company that supports e-filing. Most commercial software companies do. The software that you currently use may offer e-file. Ensure your software supports state e-filing for each state where your clients may have filing requirements. Follow your software company's specific setup and testing procedures. Consult your software company's manual or customer support line for more details or assistance.

Review Publication 1345A, Filing Season Supplement. This document contains important information for a successful filing season. It is mailed to all e-file providers each January. It is also available at www.irs.gov. Check the Updates Section for current tax year enhancements and changes to procedures. You will find phone numbers and mailing addresses for e-file help desks and processing centers. Check the e-file submission processing center relationships. If you are filing a state return that is outside your home center, the return (and signature document, Form 8453, if

applicable) must be submitted to that state's home processing center.

Prepare your client files to incorporate e-file signature documents (Forms 8879, IRS e-file Signature Authorization, and Forms 8453, U.S. Individual Income Tax Declaration for an IRS e-file Return) and Forms W-2. The retention periods for these forms signed by your clients differ (Form 8879, three years from the later of the IRS-received date or the due date of the return; Form 8453, through Dec. 31 of the current year). Separate your files accordingly, to make your yearly preparation easier. Tax returns may be stored electronically, so it is unnecessary to maintain paper copies.

Develop good habits. Perform periodic backups of your database throughout the filing season to minimize any potential loss of client data. Apply any updates to your software program as they become available. Mail Forms 8453 and client letters on a regular basis.

Resources:

- www.irs.gov/efile
- **IRS e-file Application and Suitability Help Desk**
866-255-0654 (toll-free)
- **IRS e-file help desks**
866-255-0654 (toll-free)
For assistance in resolving rejected returns
- **IRS Publication 1345 Handbook for e-file Providers**
- **IRS Publication 1345A Filing season supplement to IRS Publication 1345 containing important updates**
- **Your software company**
- **IRS Nationwide Tax Forums**
IRS conferences held annually during the summer. Go to www.irs.gov and type in IRS Keyword: **tax forum**



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