

IRS Form 990-N e-Postcard

Quick Start

This guide is designed to help you quickly navigate the IRS e-Postcard website and answer some of the questions that may arise when submitting your Form 990-N e-Postcard.

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Section 1: Steps for filing an e-Postcard

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

1. Register with the [IRS.gov](https://www.irs.gov) 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 Fraternal Units. For example, a **Preparer** can be a paid preparer, such as a CPA, Territory Manager, Chapter Analyst Coordinator, etc. By registering as a **Preparer**, you can use your login to register as many Fraternal Units as you wish.
2. Receive the confirmation email sent during the registration process.
3. Complete and submit the e-Postcard for an **Exempt Organization**.

Section 2: Getting Started

Registration information needed

To register with the [IRS.gov](https://www.irs.gov) website you will need the following information:

- Are you registering as an **Exempt Organization** or are you registering as a **Preparer**.
- 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.
- **Preparers** need to provide a Login ID.
Note: Login IDs are automatically generated for exempt organizations.
- **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.*
- Password
- Your first and last name, or Fraternal Unit's legal name.
- Your email address
Note: The email address is used to activate the registration and to communicate status information about filings. Again, we strongly advise you use your Fraternal Unit's email address (eg: Lodge/Chapter0000@mooseunits.org).

e-Postcard information needed

Important! *The Moose Fraternal fiscal year for the year you are filing must be over before filing an e-Postcard. The IRS determines the filing year using the beginning date of the fiscal period. As our fiscal period begins May 1, your Fraternal Unit will not be able to file for the current filing year until the following year. For example, this fiscal year begins May 1, 2017, and ends April 30, 2018. You will not be able to file for the 2017-2018 fiscal period until May 1, 2018.*

- Employer Identification Number (**EIN**) for the Fraternal Unit 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.*
- Is the Fraternal Unit terminated or closed (Yes or No)?
- Are the Fraternal Unit's gross receipts normally \$50,000 or less (Yes or No)?
Note: If your Fraternal Unit's gross receipts are more than \$50,000, you cannot use the e-Postcard.
- One or more other (DBA – doing business as) names used by the Fraternal Unit.
- Fraternal Unit's mailing address
- Fraternal Unit's website address (if the Unit has a website)
- Principal Officer's name and address.
Note: You may use your Administrator/Recorder as the Principal Officer's name if you select "Personal". If you select "Business", you may use the Fraternal Unit's legal name.

Section 3: Accessing the website

The e-Postcard application is accessed at the <https://sa.www4.irs.gov/epostcard/> URL. Upon accessing the URL, the Home web page is displayed. Figure 1 shows the web page.

IRS

First Time Users
If this is the first time you are using this online service, we will need to verify your identity before we proceed.

GET STARTED >

Returning Users
Log in below if you've previously registered through any of the following applications:

- Get Transcript
- Identity Protection PIN (IP PIN)
- Online Payment Agreement (OPA)
- ePostcard
- Qualified Intermediary System (QI/WP/WT)

Username

Mask Username

LOG IN >

[Forgot Username](#)

WARNING! By accessing and using this government computer system, you are consenting to system monitoring for law enforcement and other purposes. Unauthorized use of, or access to, this computer system may subject you to criminal prosecution and penalties.

[IRS Privacy Policy](#) | [Security Code Terms and Conditions](#) | [Accessibility](#)

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 sections explain these steps.

Section 4: Registering with the website

Click the **Get Started** button.

Figure 2 shows the first step to register as a new user.

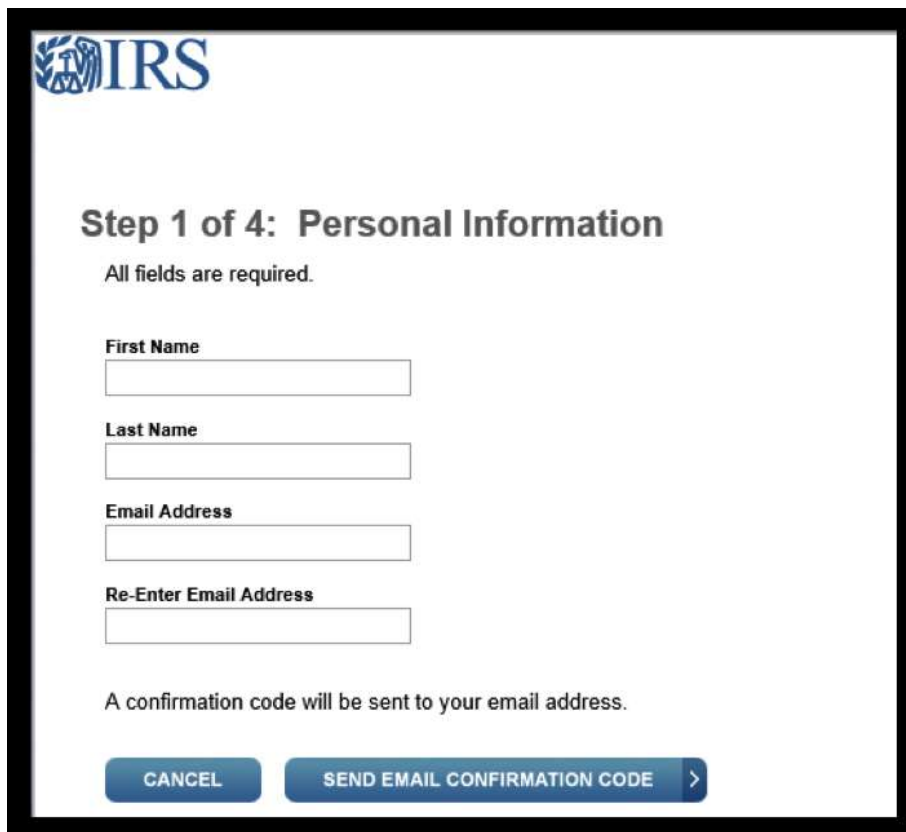
The image shows a screenshot of the IRS website's registration process. At the top left is the IRS logo. The main heading is "Step 1 of 4: Personal Information". Below this, it states "All fields are required." There are four input fields: "First Name", "Last Name", "Email Address", and "Re-Enter Email Address". At the bottom, there is a note: "A confirmation code will be sent to your email address." Below the note are two buttons: "CANCEL" and "SEND EMAIL CONFIRMATION CODE" with a right-pointing arrow.

Figure 2. Step 1: Get Started

Click the *Send Email Confirmation Code* button.

Figure 3 shows Step 2: Verify Identity.

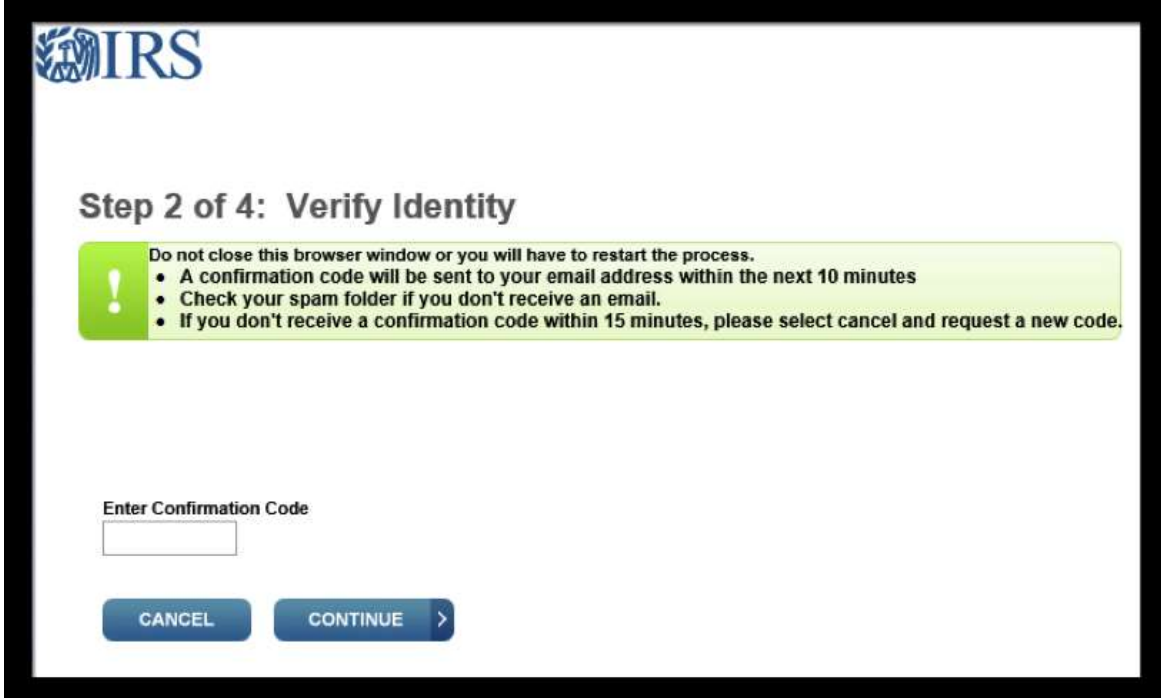


Figure 3. Step 2: Verify Identity

Enter the confirmation code found in your email, then click the *Continue* button. If you do not receive a confirmation email, please check your spam or junk folders in your email.

Note: This code is time sensitive. It is only valid for 15 minutes. If you are unable to retrieve this code within 15 minutes, you must select *Cancel* and request a new code.

This is where most fraternal units have trouble. Please be patient and be sure to refresh your email frequently, checking your spam or junk mail folders as well.

Click the *Continue* button once you have entered the confirmation code from your email.

Figure 4 shows the first part of Step 3: Choosing a User ID and Password on the *Security Profile* page:

Figure 4. Choosing a User ID and Password

Be sure to only use letters, numbers, or a hyphen for your User ID.

Passwords may contain letters, numbers, ! or # only.

Figure 5 shows the second part of Step 3: Choosing a Site Phrase. This will help you to verify that you are not on a fake or scam page. Spaces are allowed to be used in the site phrase.

Figure 5. Choose a Site Phrase

Figure 6 shows the third part of Step 3: Choosing a site image.

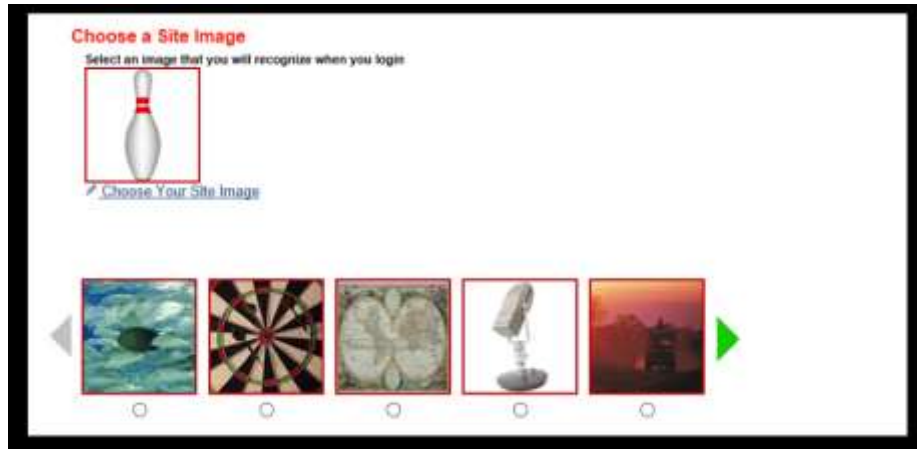


Figure 6. Choose a Site Image

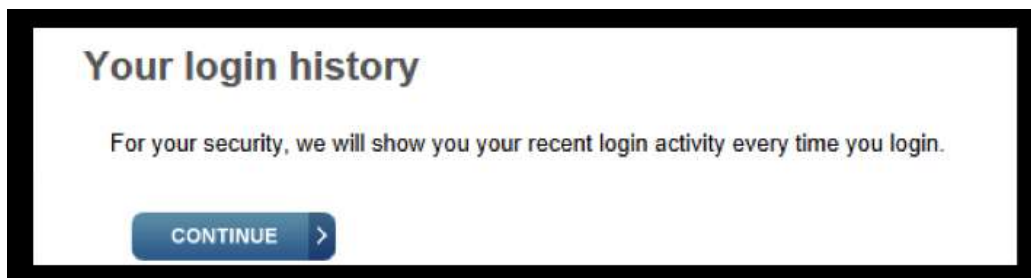
Figure 7 shows the fourth part of Step 3: Choosing your Challenge Questions.

Figure 7. Choose your Challenge Questions

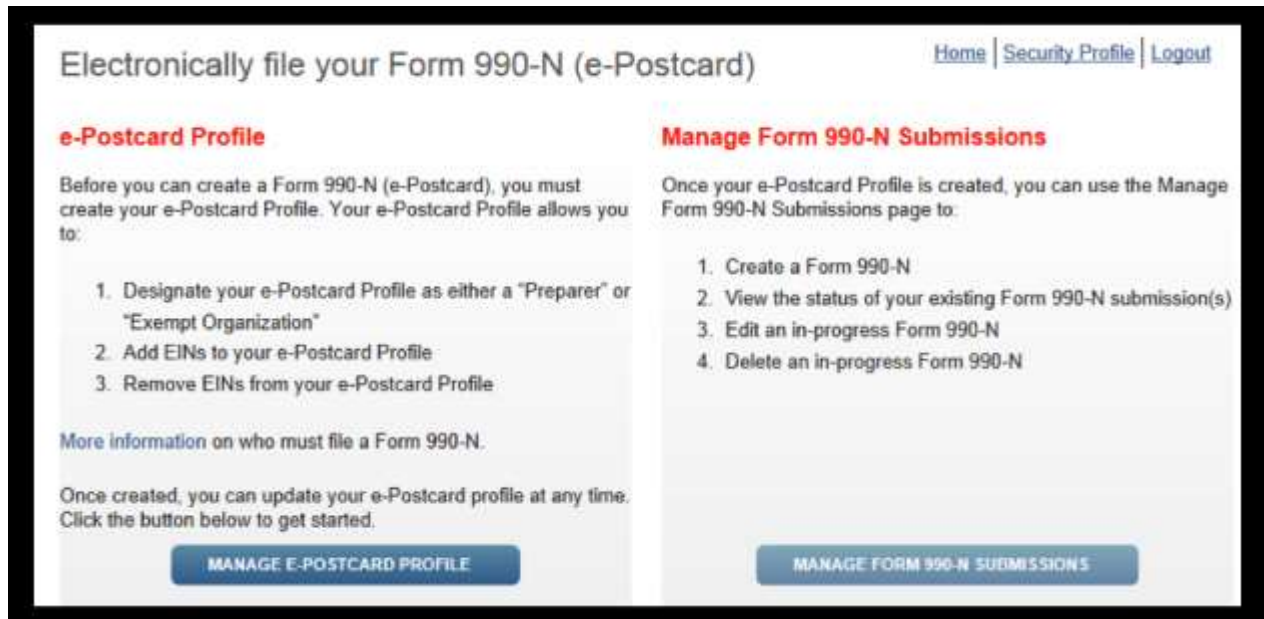
Once you have successfully chosen and answered all four security questions, you will see the following screen displayed: Click on the *Continue* button.



You will then be taken to the **Your login history** page. This will display each time you log in for security purposes. Please click on the *Continue* button.

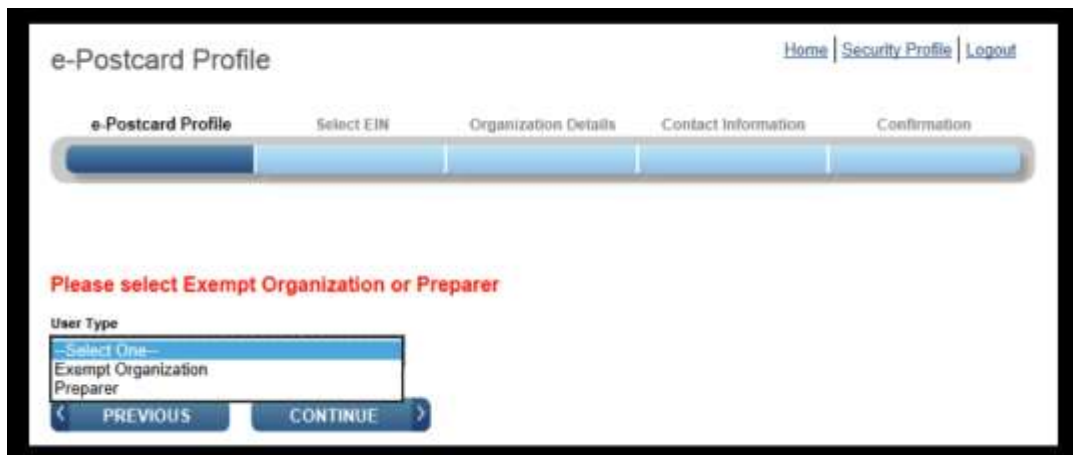


You will then be brought to the following webpage:



If this is your first time filing Form 990-N, please click the ***Manage E-Postcard Profile*** button to continue creating your profile.

The next step in the process is to select your user type.



Select ***Exempt Organization*** if you are only completing Form 990-N for your own Fraternal Unit.

Select ***Preparer*** if you are an individual assisting multiple Fraternal Units.

After selecting your user type, please click the ***Continue*** button.

The screenshot shows the 'e-Postcard Profile' page with a navigation bar containing 'Home', 'Security Profile', and 'Logout'. Below the navigation bar is a progress bar with five steps: 'e-Postcard Profile', 'Select EIN', 'Organization Details', 'Contact Information', and 'Confirmation'. The first step is highlighted.

Below the progress bar, it says 'You are logged in as: Exempt Organization' with an 'Edit user type' link.

The 'EIN' section has two input fields: the first contains 'XX' and the second contains 'XXXXXXXX'. To the right of these fields is a blue 'ADD EIN' button.

Below this is a section titled 'Currently Associated EIN(s)' in red. It contains a table with the following structure:

EIN	Organization Name	Date Added	Delete
No EINs are currently associated with your ID			

At the bottom of the page are two buttons: 'DELETE EIN' and 'CREATE NEW FILING' with a right-pointing arrow.

Please enter the EIN for your Fraternal Unit and select the **Add EIN** button.

- If you are a Preparer, you may also delete EINs associated with your profile here.

To continue creating your Form 990-N, please click the **Create New Filing** button.

Section 5: Entering a new e-Postcard filing

The next web page will then prompt you to select the EIN for which you are filing for. Highlight the EIN from the drop down box and click the **Continue** button.

Select EIN [Home](#) | [Security Profile](#) | [Logout](#)

e-Postcard Profile **Select EIN** Organization Details Contact Information Confirmation

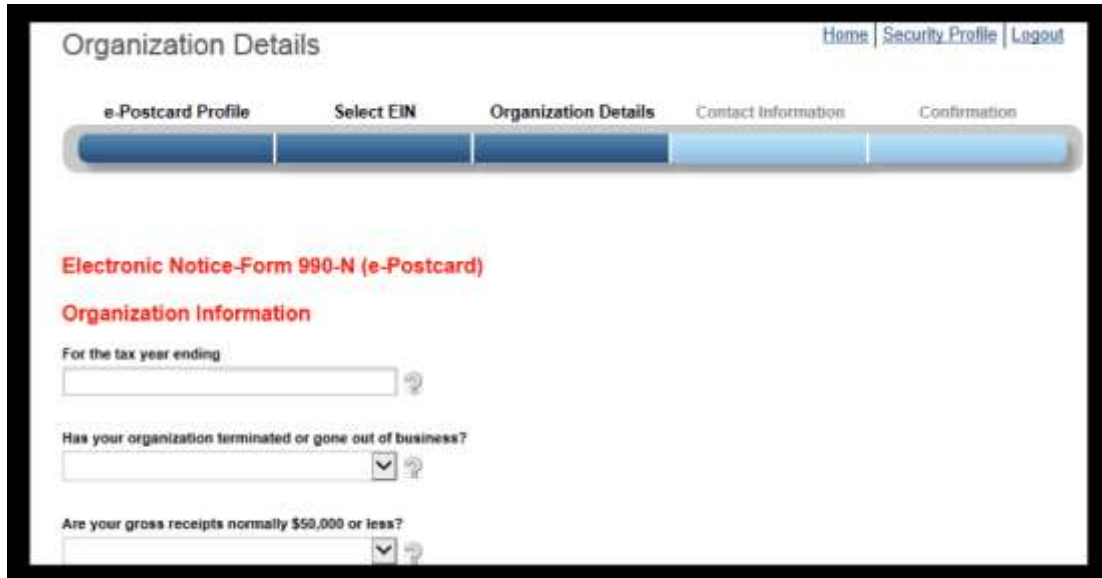
Please select the EIN for which you want to file for

EIN
Select EIN-

MANAGE E-POSTCARD PROFILE CONTINUE

Important! The Moose Fraternal fiscal year for the year you are filing must be over before filing an e-Postcard. The IRS determines the filing year using the beginning date of the fiscal period. As our fiscal period begins May 1, your Fraternal Unit will not be able to file for the current filing year until the following year. For example, this fiscal year begins May 1, 2017, and ends April 30, 2018. You will not be able to file for the 2017-2018 fiscal period until May 1, 2018. The system uses your Fraternal Unit's information registered with the IRS to determine your fiscal year. You will need to contact the IRS if the fiscal year listed is different from the beginning and end of our Fraternal year.

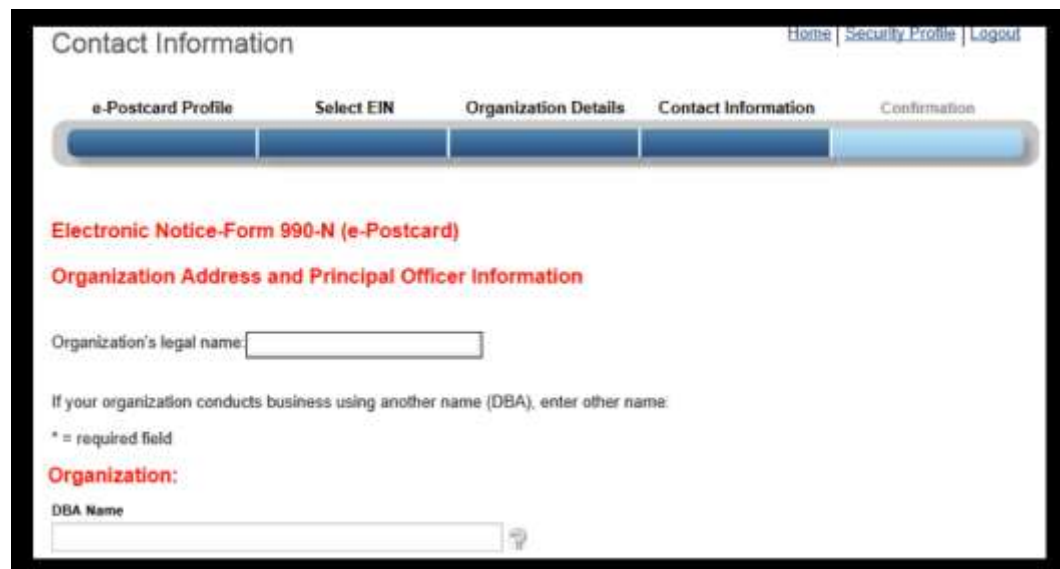
Complete the *Organization Details* page. If you are unsure of the question, please click the question mark located next to it for clarification.



Be sure to indicate the correct tax year ending, and indicate if your Fraternal Unit has closed/terminated. Finally, indicate if your Fraternal Unit's gross receipts are less than \$50,000. If they are not, you may not file the 990-N e-Postcard.

When each line is completed, please click the ***Continue*** button.

Next, you will need to complete the *Contact Information* page. Again, if you do not understand the request of a question, please click on the question mark following the question for clarification.



Enter the following information that you should have gathered prior to beginning your filing process:

- One or more other (DBA – doing business as) names used by the Fraternal Unit.
- Fraternal Unit’s mailing address
- Fraternal Unit’s website address (if the Unit has a website)
- Principal Officer’s name and address.

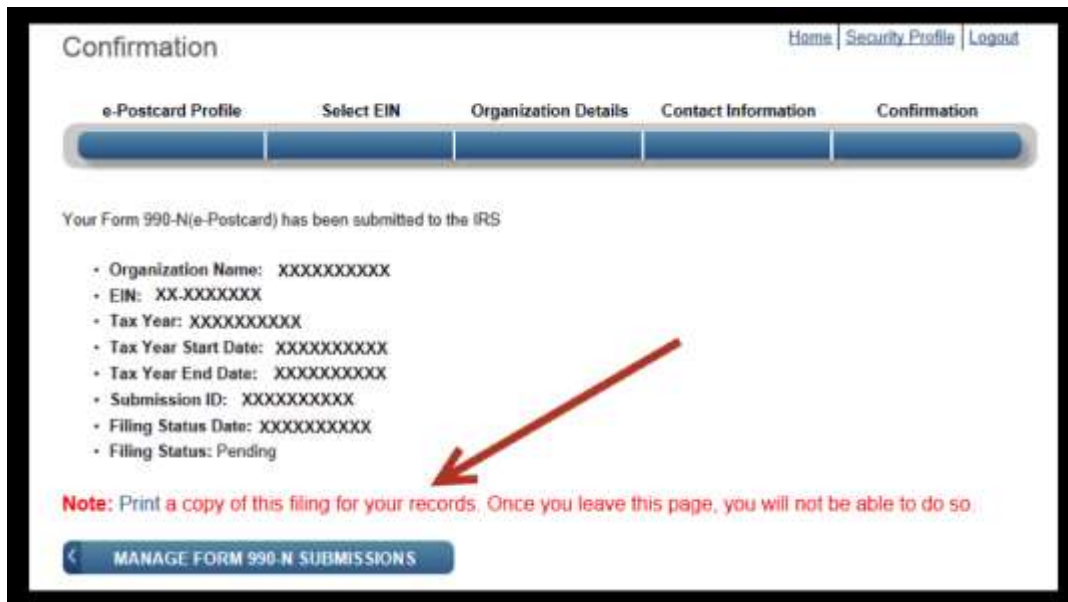
***Note:** You may use your Administrator/Recorder as the Principal Officer’s name if you select “Personal”. If you select “Business”, you may use the Fraternal Unit’s legal name. Regardless of which you choose, please enter the Fraternal Unit’s mailing address as the Principal Officer’s address.*

Once you have completed the *Contact Information* page, select one of the following options:

- **Save Filing:** Select this option if you are missing any information or need to step away from the computer prior to completing the form. This will allow you to return later and finish.
- **Submit Filing:** If you are sure all the information you have entered is correct and complete, select this option to file your Form 990-N.

The **Confirmation** page will then be displayed and the filing status will display as 'Pending'.

Please be sure to click on the word "Print" in blue in the bottom red line to print a copy of your filing for your records. Once you leave this page you will be unable to print this filing.



After you have printed a copy of your Form 990-N for your records, please click on the **Manage Form 990-N Submissions** button.

On the **Manage Form 990-N Submissions** page, your filing will initially display as 'pending'.

After seven minutes, you may refresh this page and a **Get Updated Status** button will appear. Please click on this button to see if your Form 990-N was accepted or rejected.

- If your Form 990-N was rejected, please click on the **Submission ID** link for more information.

Section 6: Some Tips to Remember!

- Please note that you only need to file the Form 990-N e-Postcard **once** in a fiscal year. It is strongly advised that you do this as soon as the fiscal year ends (April 30th) to avoid any last-minute issues that may arise. Filing after the September 15th deadline may incur your Fraternal Unit with penalties and fines, or could result in your Fraternal Unit losing its exempt status. Your Fraternal Unit may file an extension using Form 8868, available on the IRS website at www.irs.gov.
- It is advised to make your password something easy to remember, such as your Fraternal Unit name and unit number.
- You will be required to enter an email address during the registration process. We strongly advise you use your Fraternal Unit's email address (eg: Lodge/Chapter0000@mooseunits.org). If you forget your password, this is the email address used to reset your password.
- The Moose Fraternal fiscal year for the year you are filing must be over before filing an e-Postcard. The IRS determines the filing year using the beginning date of the fiscal period. As our fiscal period begins May 1, your Fraternal Unit will not be able to file for the current filing year until the following year. For example, this fiscal year begins May 1, 2017, and ends April 30, 2018. You will not be able to file for the 2017-2018 fiscal period until May 1, 2018. The system uses your Fraternal Unit's information registered with the IRS to determine your fiscal year. You will need to contact the IRS if the fiscal year listed is different from the beginning and end of our Fraternal year.

Please visit <https://www.irs.gov/charities-non-profits/annual-electronic-filing-requirement-for-small-exempt-organizations-form-990-n-e-postcard> for more information regarding Form 990-N (e-Postcard).