

# TaxWise® Desktop Learning Portal

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## Tax & Accounting

### Securing your EFIN

The IRS has a few broad guidelines for paid tax preparers. They must 1) use professional tax software that allows them to sign the return as a paid preparer and 2) e-file the return as an Electronic Return Originator (ERO). An ERO is the authorized IRS e-file Provider that originates the electronic submission of a return to the IRS. The ERO is usually the first point of contact for most taxpayers filing a return using IRS e-file.

#### Become and Authorized e-File Provider


Another critical number that professional tax preparers need to get started, an electronic filing identification number (EFIN) is assigned by the IRS to preparers who are approved for the federal and state e-file program.

Unlike the PTIN, an EFIN doesn't expire or require renewal. However, if the name of your tax office or Employer Identification Number (EIN) changes, you'll either need to replace your EFIN or update it through the online portal.

Obtaining an Electronic Filing Identification Number (EFIN), is a three-step process, which consists of:

1. Creating an IRS e-Services account on the [IRS website](#).
2. Completing and submitting the application to become an authorized IRS e-file provider. Plan ahead – it can take the IRS up to 45 days to approve an e-file application. The application includes identification information for the tax office, information for each Principal or Responsible Official, and your e-file provider option. Depending on the status of the Principal or Responsible Official, either their current professional status information or a fingerprint card will have to be provided.
3. Passing a suitability check. This suitability check will be done on the tax office and each person listed on your application as either a Principal or Responsible Official. This may include a credit check, a tax compliance check, a criminal background check, and a check for prior non-compliance with IRS e-file requirements.

Once approved, you will receive an acceptance letter from the IRS with your EFIN.

 For additional step-by-step guidance of the e-file application process, check out IRS [PUB 3112, IRS e-file Application and Participation](#).

#### Applying for EFIN New Application



An individual representing the firm can begin the IRS e-file application after creating an e-Services account. The application process is necessary to protect the integrity and security of the electronic filing system. The process is comprehensive and designed to allow you to save your data during the session, if needed, and to return the application when convenient. Plan, accordingly, as the IRS may take up to 45 days to approve an application.

The application to become an ERO and to be issued an EFIN is the e-File Application.

#### Quick Guide

Here is a quick guide to complete and submit the application:



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- Go to [e-Services](#) page, select E-file Provider Services, then select Access e-file Application to log in.
  - Sign in with ID.me credential.
    - If you haven't created one, click Create a new account and follow steps outlined above.
  - Select your e-file Provider Options - businesses that want to e-file for a client should select Electronic Return Originator (ERO).
  - Enter the name, social security number, date of birth, e-mail address and citizenship status for each Principal and Responsible Official in your firm.
  - Enter the current professional information for Principals and Responsible Officials if an attorney, certified public accountant, enrolled agent, officer of a publicly traded corporation, or a bonded bank official.
  - Each Principal or Responsible Official who does not provide professional credentials must use the IRS Authorized Vendor for fingerprinting. To obtain the link for scheduling an electronic fingerprinting appointment, they must access the e-file Application Summary page and use the scheduling link in the Terms of Agreement Signature(s) & Personal Information section.
  - Each Principal and Responsible Official must answer several personal questions and acknowledge reading the Privacy Act and Paper Reduction Act Notice, FBI Privacy Act Statement, and the Terms of Agreement (TOA) by entering a PIN you selected when creating your Secure Access account. By doing this, each Principal and Responsible Official declares under penalty of perjury that the personal information is true.
  - Submit the IRS e-file Application and retain the tracking number provided after successful submission of the application.
-  Contact the e-help Desk at 866-255-0654, for assistance with the IRS e-file Application.
-  For additional step-by-step guidance on the e-file application, check out [IRS Publication 3112, IRS e-file Application and Participation](#).

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### **Step 3: Pass a Suitability Check**

After you submit your application and submit the required information outlined above, the IRS will conduct a suitability check on the firm and on other principle and responsible officials listed on the application. This suitability check may involve a:

- Tax compliance check
- Check for prior non-compliance with IRS e-file requirements
- Credit check
- Criminal background check

If your application is approved, the IRS will send you an acceptance letter with your Electronic Filing Identification Number (EFIN).