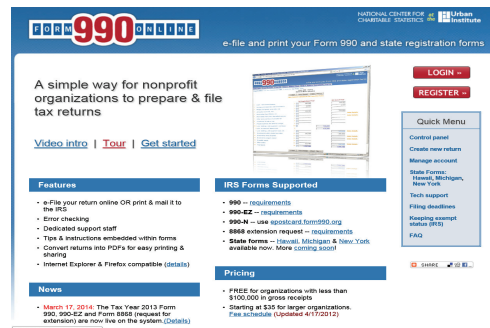


# GUIDE TO OBTAINING AND USING A PAID PREPARER LOGIN



# Obtaining and Managing “Paid Tax Preparer” Logins

- A person who is not an employee or volunteer of a charity and who prepares Hawaii charitable solicitation registration materials on behalf of a charity that solicits donations in Hawaii must obtain and use a “Paid Tax Preparer” login to prepare Hawaii registration and annual financial report filings.
- Using a Paid Preparer login allows the preparer to log into the website once and create and prepare registrations and annual reports on behalf of multiple organizations.
- Paid Preparers receive the same system generated email notifications that the officers of the organization do regarding the status of the filings the Paid Preparer has prepared.
- Each person that obtains a login must complete a profile for their login and must use an email address that is personal to them and which only they access. A person with an active login may update the information on their user profile by logging onto the website.

e-file and print your Form 990 and state registration forms

A simple way for nonprofit organizations to prepare & file tax returns



LOGIN >>

REGISTER >>

- Quick Menu
- Control panel
  - Create new return
  - Manage account
  - State Forms: Hawaii, Michigan, New York
  - Tech support
  - Filing deadlines
  - Keeping exempt status (IRS)
  - FAQ

To get started and obtain a Paid Preparer login, go to:

**[Http://Efile.form990.org](http://Efile.form990.org)**  
and click the "Register" button.

- Dedicated support staff
- Tips & instructions embedded within forms
- Convert returns into PDFs for easy printing & sharing
- Internet Explorer & Firefox compatible ([details](#))

- **8868** extension request -- [requirements](#)
- **State forms** -- [Hawaii](#), [Michigan](#) & [New York](#) available now. More [coming soon!](#)

**Pricing**

- FREE for organizations with less than \$100,000 in gross receipts
- Starting at \$35 for larger organizations. [Fee schedule](#) (Updated 4/17/2012)

**News**

- **March 17, 2014:** The Tax Year 2013 Form 990, 990-EZ and Form 8868 (request for



**Request Login ID**

**NOTICE: Small organizations, with gross receipts of less than \$50,000 for tax year 2010, may be eligible to file the Form 990-N (e-Postcard). Please click this link to access the Form 990-N website: [epostcard.form990.org](http://epostcard.form990.org).**

This page allows you to request a Login ID and password for the **990 Online** nonprofit e-filing system. Your Login ID and password allow you to enter and electronically file IRS Form 990, 990-EZ and/or Form 8868 (Application for Extension of Time to File an Exempt Organization Return) using the **990 Online** system. You can also enter and file State Charity Registration Forms (for participating States) using the Online State Registration System.

**Nonprofit Organizations:** The system will automatically generate your Login ID based on the EIN of your organization. The login ID will be your EIN (without the dash) plus '01'. For example, if the EIN for your organization is 12-3456789, then your Login ID will be 12345678901. Once you have created and activated the first Login ID for your organization, you can create additional Login IDs for other people in your organization. The additional Login IDs will have the same format, but will end in '02', '03', etc.

**Paid Tax Preparers:** The system will ask you to enter a unique Login ID. As a paid preparer you only need to request one Login ID. Your one Login ID allows you to enter, transmit, and efile IRS and State forms on behalf of multiple nonprofit organizations.

Once you have completed the Login ID Request process, the system will send you an email containing an activation link. **You must click on the link in the email to activate (and use) your Login ID.**

Please click the **'Next'** button to continue . . . .

Next >>

Please read and click "Next."

Questions or problems regarding this web site should be directed to [Tech Support](#)

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**Request Login ID - Step 1**

Please select the type of Login ID you are requesting (Nonprofit or Paid Tax Preparer):

Login ID Type:

Nonprofit  
 Paid Preparer

Organization EIN

-

How did you hear about us?

Please select "Paid Preparer" and click "Next."

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## Request Login ID - Information and Tips

### Login ID Tips: (Please Read)

1. Your Login ID and password must each be between 6 and 15 characters.
2. Your password is case sensitive. That means that the Password "Mark299" is different than the password "MARK299".
3. We recommend that you use a combination of upper case letters, lower case letters and numbers in your password.
4. Never share your password with anyone else.
5. Save your Login ID and password in a safe place so you can use them to create and submit subsequent annual IRS and/or State filings or to edit filing that have not yet been transmitted.

**IMPORTANT:** Make sure the email address you enter is valid. The security in the authentication process requires you to respond to an email that is sent to the email address in our records. If you do not receive that email, you will not be able to complete the authentication process, and your return **will not be transmitted to the IRS.**

Please view our [privacy](#) policy if you have concerns regarding how your personal information will be handled.

Please click the 'next' button to continue . . .

<< Back

Next >>



Please read and click "Next."

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e-file and print your Form 990 and state registration forms

## Request Login ID - Step 2

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

Login ID Type:

**Paid Preparer**

Login ID:

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

Password:

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

**Verify** Password:

First Name:

Last Name:

Position:

(Treasurer, President, etc.)

Email Address:

**Verify** Email Address:

Daytime Phone:

Organization:

Name:

Address:

City/State/Zip:

HI





&lt;&lt; Back

Next &gt;&gt;

Fill in the information in each of the boxes. Please use an email address that is personal to you and which only you have access to.

Browser address bar: efile.form990.org

Navigation tabs: Master, Leg, ERI, Found. CTR, AG, Google, HRS 467B, Request Lo..., BREG, GuideStar, RS SC



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**Request Login ID - Success**

**The following Login ID was successfully created:**

**Login ID:** legalclerk/cpa  
**Name:** Paid Preparer  
**Title:** Legal Clerk/CPA  
**Email:** ATG.Charities@hawaii.gov

The system has sent an email to the email address above containing instructions on how to activate this Login ID. The Login ID must be activated before it can be used.

**IMPORTANT:** If the email account above has a spam filter, please ensure that the filter is set up so that it can receive emails from the following email address: [efiletechsupport@urban.org](mailto:efiletechsupport@urban.org)

**Please close your browser now.**

An email will be sent to the email address used when creating your login. You will need to use the link in the email to activate your Paid Preparer Login.



From: "efiletechsupport@urban.org" <efiletechsupport@urban.org>

To: [ATG.Charities@hawaii.gov](mailto:ATG.Charities@hawaii.gov)

Sent: Saturday, November 22, 2014 12:33 PM

Subject: Form990.org Login Activation Notice

Paid Preparer,

Your efile.form990.org Login ID has been created.

Login ID: legalclerk/cpa

Name: Paid Preparer

Organization: Paid Preparer

Login Type: PaidPreparer

An email like this will be sent to the person that created the Paid Preparer login at the email address listed in the person's profile. The person needs to click the link in the email to complete the activation for their login.

Once you have activated this login ID, you can use it to enter, view and authenticate (electronically sign) IRS Form 990/990-EZ and State Registration Forms for Nonprofit Organizations.

Please click the link below to begin the Activation process (Note: if your email program does not display the web page as a link, copy the whole link and paste it into your browser):

IMPORTANT: We recommend that you close any open browser windows before you click this link.

<https://efile.form990.org//frmAdminLoginActivate.asp?A=Q092807o540397iSo>

Please feel free to contact technical support if you have any questions

Efile.form990.org Technical Support team

email: [efiletechsupport@urban.org](mailto:efiletechsupport@urban.org)

Phone (Toll Free): 888-666-1773 (hours: 9:30 AM and 5:30 PM Eastern Time)

Activate Login ID

The following Login is ready to be activated:

User Name:	Pitter Pat
Login ID:	Pitterpat
Login Type:	PaidPreparer

If the above information is correct, please enter you password below and then click the *Next* button.

Password:

Note: Your password is case sensitive.

Next >



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The link in the email will take you to this page where you will need to enter the password that you chose when you completed the login profile (see page 7 of this Guide) then click "Next."

**Activate Login ID (Declaration)**

Please read the following and then click either the 'I Agree' or the 'Cancel This Login ID' button below:

Login ID:	Pitterpat
Name:	Pitter Pat
Title:	legal clerk
Organization:	Pitter Pat
Email:	nelliesweetarts@yahoo.com

This is the final step in creating a Paid Preparer Login.

I, **Pitter Pat**, understand and agree that I may be asked to use this Login ID to authenticate (electronically sign) official Federal and/or State Documents on the efile.form990.org website.

I agree not to make this user account available to other users. I understand that others who may be authorized to complete or sign documents on this site will need to obtain their own Login ID.

I declare that the information provided for this Login ID, including my legal name, title and email address, is correct.

Further, I declare that when I use this Login ID to authenticate a document at this website it is my intent that this digital signature shall be considered the same as a physical signature. I understand that pursuant to any state or federal law applicable to electronic transactions or digital signatures, that my electronic signature has the same legal effect as a physical signature including, but not limited to, penalties provided by law for unsworn falsification to a governmental authority in an official matter.

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Once you have activated your Paid Preparer login you may begin to create filings for Hawaii on behalf of charities. To create a filing click "Create new Filing."

Create a New Filing



Select the Organization you would like to work with:

**Filing List**

Click on the *Action* Icon to the right of the filing you want to access. See the legend (below) for a description of the actions.

\*\*\* No Returns for this Organization \*\*\*

**Quick Menu**

- [Manage User Accounts](#)
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- [FAQ](#)
- [Participating States](#)
- [E-Filing Steps](#)
- [Requirements and Tips](#)
- [Filing Deadlines](#)

## Create Filing Process (Filing Info)

User: tobbymypal - Kathryn Kanemori, Kathryn Kanemori (PaidPreparer)

### Welcome to the 990 Online Return and Charity Registration Creation Process

**This is the starting place for creating returns and registrations in the 990 Online and Online State Charity Registration System.**

This process walks you through the steps of creating a new 990 Online filing. A 990 Online filing can be either a single return (such as a Form 990) or a group of related returns (such as a Form 990, a State Charity Registration for Hawaii and a State Charity Registration for Pennsylvania) which are created and electronically filed as a group.

To begin the process, please enter the EIN of the organization, the start and end dates for the reporting period (i.e the fiscal year which this filing covers), and click the *Next* button below. You may access more information by clicking the help icon associated with each question.

Organization EIN:

Organization Name

Tax Period Start Date



Tax Period End Date



Cancel Next >>

Questions or problems regarding this web site should be directed to the NCCS/NASCO E-Filing Helpdesk. Concerned about your privacy? Please view our [privacy policy](#). This website is best viewed with Microsoft Internet Explorer. Current Web Page: Form990Main - CreateNew\_Filing.aspx Copyright © 1999 - 2014 the NCCS/NASCO E-Filing System. Last modified: June 10, 2014.

To create a filing on behalf of a charity for Hawaii, insert the charity's EIN, Name, and the start date of the fiscal year then click "Next."

Quick Jump Create New Filing Log Out

Create Filing Process (Return Info)

User: 11900201501 - Deputy Attorney General, Hawaii Tax & Charities (NonProfit)

This pages allows you to specify the IRS form you wish to create. It also allows you to specify if you wish to create state filings.

Please select the type of IRS form to file (if any)

Not filing an IRS form

Are you going to complete state forms for this filing?

Yes

<< Back Cancel Next >>

Questions or problems regarding this web site should be directed to Tech Support.

efile.form990.org/Form990Main.aspx?LoginStateID=1393237 Form 990 Main System - Create Filing Process (State Forms)



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Quick Jump Create New Filing Log Out

Create Filing Process (State Forms)

User: 11900201501 - Deputy Attorney General, Hawaii Tax & Charities (NonProfit)

You have selected to file with one or more individual states.

Please check at least one state form you wish to file. Click the help icon for detailed information about the state forms listed.

- Hawaii Annual Charity Transmittal Form
- Michigan Initial Charitable Trust/ Charitable Solicitation Questionnaire (complete this form ONLY if you have not previously filed with Michigan)
- Michigan Registration To Solicit Donations

If you are not including any state forms with this filing, please go back to the Return Info web page and select No to the Are you going to complete state forms for this filing? question.

<< Back Cancel Next >>

efile.form990.org/Form990Main.aspx?LoginStateID=1398236 Form 990 Main System - Create Filing Process (Summary)



Quick Jump Create New Filing Log Out

Create Filing Process (Summary)

User: 11900201501 - Deputy Attorney General, Hawaii Tax & Charities (NonProfit)

Summary

Organization EIN: 11-9002015  
 Organization Name: Hawaii Tax & Charities  
 Tax Period Start Date: 01/01/2011  
 Tax Period End Date: 12/31/2011  
 IRS form: Not filing an IRS form  
 Form Delivery: E-file

The following state forms have been selected for filing:  
Hawaii Annual Charity Transmittal Form

If the above information is correct, you are ready to start entering the data into this filing. When system will save the information you have entered here and will send you to the 990 Online system so you can enter the State Charity Forms you have selected.

<< Previous Finish

Questions or problems regarding this web site should be directed to Tech Support.

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Current Web Page: Form990Main - CreateNew\_Summary

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The online system will take you through these screens to begin the initial steps to create an initial registration or an annual financial report for Hawaii on behalf of a charity.

Step-by-step Guides on how to complete an initial Registration and Annual Financial Reports are available to view and download from the Hawaii Charities website at <http://ag.hawaii.gov/tax/>

**Control Panel**

**NOTICE:** Recent versions of Firefox have problems viewing some PDF files (including ours). Click [here](#) for details

You can use our system to electronically file both your IRS Form 990/990-EZ and your NY CHAR500. [Details](#)

**Paid Preparer**

Create a New Filing

Select the Organization you would like to work with:

AMERICAN LUNG ASSOC OF THE MOUNTAIN PACIFIC (93-0386887)  
Hawaii Tax & Charities (11-9002015)  
WAHIAWA GENERAL HOSPITAL (99-0269825)

Click on the *Action* Icon to the right of the filing you want to access. See the legend (below) for a description of the actions.

\*\*\* No Returns for this Organization \*\*\*

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- [Requirements and Tips](#)
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Once you have created a filing on behalf of a charity client, when you want to edit or create subsequent filings for these organizations their name will appear in the drop down box.

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### Control Panel

**NOTICE:** Recent versions of Firefox have problems viewing some PDFs

You can use our system to electronically file both your IRS Form 990 and state registration forms

### Paid Preparer

Create a New Filing

Select the Organization you would like to work with:

Hawaii Tax & Charities (11-9002015)

### Filing List

Click on the Action Icon to the right of the filing you want to access. See the Action Legend for more information.

Tax Year	Start Date	End Date	Created On	Filing Type	IRS Form			
2013	1/1/2013	12/31/2013	09/06/2014	Return	None	HI		
2012	1/1/2012	12/31/2012	08/29/2014	Return	None			
2011	1/1/2011	12/31/2011	09/19/2014	Return	None	HI		
2010	1/1/2010	12/31/2010	11/18/2014	Return	None	HI Transmittal	Accepted	
2008	1/1/2008	12/31/2008	11/23/2014	Return	None			

When you select the organization from the drop down box, you will see a list of all of the filings for that organization. To edit the filing you created, click the pencil icon and the system will allow you to enter the data necessary for that filing and select the officer(s) of that organization who will authenticate the filing. Paid Preparers receive the same email notifications that the charity officer who is selected to authenticate the filing does.

### Quick Menu

[Manage User Accounts](#)  
[Technical Support](#)

### Action Legend

Edit a Return in Filing  
 View Filing Status