

e-services Registration

Frequently Asked Questions



1. Why do I have to register for e-services?

A: Registration creates a personal, on-line account for conducting business with the IRS electronically. The information gathered during the registration process is used to confirm the user's identity.

2. What are the security features of Registration? What are the personal data elements used to validate a user's identity?

A: During the registration process, applicants are asked to provide their legal name as shown in IRS records, SSN, date of birth and original, unadjusted AGI from the current or prior tax year. These data elements are validated against extracts from the Social Security Administration and the IRS masterfile. Registration cannot be completed unless all these data elements match. An additional security measure, a change of address confirmation letter, is sent whenever a registrant enters a new address.

3. What are the rules for choosing Usernames, Passwords and PIN's?

- **Usernames** can be any combination of letters and/or numbers and does not have to contain both. However, it can only be 8, 9 or 10 characters.
- **Passwords** must be a minimum of 8 and a maximum of 32 characters.
- It must contain a combination of letters and numbers and contain at least one of each.
- Passwords are case sensitive.
- Passwords may not match any of your last five passwords.
- The password cannot match or contain any portion of your username, first name, last name or SSN.
- Passwords cannot contain strings of three or more consecutive characters (e.g. aaa, \$\$\$)
- Passwords will expire after 180 days if not changed before that.
- When changing a password, you must change at least 20 percent without regard to sequence.
- **PIN's** must be exactly 5 numeric digits (0-9).

(For more information, see the [Registration Password Assistance Procedures job aid attached.](#))

4. What is the reason for requiring a “Username” and a “Password” and a “PIN”?

A: Requiring both a username and a password is an accepted industry standard for accessing electronic services. Virtually all on-line systems used in business, education and government require both pieces of information. The PIN serves as your electronic signature within e-services. Anytime you complete an electronic transaction, you will sign it with your PIN, just as you would with pen and ink in the paper world.

5. What e-service applications are available to me at the time I complete my registration?

A: Unconfirmed registrants can immediately apply to participate in the IRS e-file program or request a PTIN upon completion of the initial on-line registration.

6. Why do I have to wait for a confirmation letter to use some e-services?

A: The confirmation letter is an important part of the user identity validation process. Even though a registrant can update their IRS address of record by entering a new address during registration, a change of address letter is mailed to the official IRS address before changes. Sending a change of address confirmation letter to the “old” address could notify a potential identity theft victim that someone is attempting to gain unauthorized access to confidential taxpayer information by posing as a legitimate practitioner or payer. Applicants are not allowed to use e-service products that could involve disclosure of sensitive information before completing this final security validation step.

7. How long does it take to get a confirmation letter?

A: Confirmation letters should automatically generate upon successful completion of the on-line registration. Delivery via regular US mail should be within 10 days.

8. What should I do if I don’t get my confirmation letter by the confirmation deadline?

A: If it has been more than 14 days since on-line registration, you should call the e-services help desk for assistance. These inquiries should be referred to Level 2 for resolution.

9. I didn't confirm my registration within the 28 day deadline. Do I need to start all over again?

A: Once you have successfully registered, you cannot register again. Attempts to re-register will generate error codes stating "Data confirmation error" or "One or more of the fields don't match". Instead, use the [**Forgotten Password or PIN**](#) link on the **Registration Services** page to request a new Password and PIN. This process will generate a new confirmation notice.

10. Does filling out my registration with a new address change my address of record with the IRS?

A: Yes, but a change of address confirmation letter is still sent to the previous address of record for security reasons.

11. When I try to register, I get an error message telling me some of my personal data is incorrect. I'm certain that it is OK. What should I do?

A: There are several conditions that could cause this result. One possibility is that the name or date of birth information on file with the Social Security Administration is incorrect. If so, the caller must contact the SSA to correct the data. A second condition is that the registrant's name has changed (most frequently as a result of a change in marital status) and is correct in IRS records but was never reported to the SSA. Again, in this instance, callers must be referred to the SSA to correct their personal data. Another possible explanation is that the caller is using an AGI *as adjusted or amended*. The validation process uses the AGI shown on the original return *as filed*, including any adjustments made in processing due to math errors. The AGI should not include adjustments occurring after the return is posted to Masterfile. There have been rare instances where AGI validation failures occur even when the AGI being used matches exactly with IDRS data. This is because the AGI is validated against the XDB databases rather than CFOL. Some inconsistencies have been shown to exist. If you encounter such an instance, refer the case to the ANA REG help desk group for resolution.

12. Why doesn't the error message tell me exactly what's wrong?

A: This is another security feature. It restricts unauthorized users from guessing confidential identity information by not pointing out the data element that needs more "hacking".

13. I tried inputting a registration three times in a row and failed all three times. I corrected my data but I still can't successfully register. What happened?

A: Registrants are automatically locked out of the system after three unsuccessful registration attempts. This security feature combats "guessing" by unauthorized users.

14. For how long am I locked out?

A: Lockouts are released 24 hours after the event.

15. The registration screen asks for my TIN. Can I use my EIN?

A: No, a Registration TIN must be either a Social Security Number or an Individual Taxpayer Identification Number (ITIN).

16. Why can't I use my firm's TIN instead of my SSN?

A: e-service privileges are extended only to individual users. Businesses can be composed of many individuals. The stringent requirements for identity validation needed for the release of sensitive taxpayer data require individual accountability.

17. Can you help me recover a lost password?

A: No, your password should not be disclosed to anyone, not even the IRS. An IRS assistor cannot tell you your lost password without compromising it in the process. However, the on-line registration includes a self-service lost or forgotten password utility. A lost password cannot be recovered, but users can self-select a new password online by using the **Forgotten Password or PIN** link on the Registration Services page.

18. When I tried to sign in to e-services, I got a message saying my password has expired. Can you reset my password?

A: No, you will need to use the **Forgotten Password or PIN** link to self-select a new password. You will be sent a new confirmation token but you cannot use the e-service incentive products until you have reconfirmed.

19. When I get a replacement password and PIN, do I have to wait for a new confirmation letter to use any of the incentive products?

A: Yes, built-in security features will validate the identity of a lost or expired password requester via the confirmation letter process.

20. As a fiscal year filer, can I register for e-services?

A: Yes, select the calendar year in which your fiscal year ended from the dropdown box on the registration screen.

21. I have a negative AGI. What is the correct format for entering it, or should I use a zero?

A: Negative AGI's should be entered with a minus sign before a whole dollar amount. For example, a negative AGI of \$3,557.15 would be entered as -3557. Do not use brackets to indicate a negative amount.

22. I keep getting asked another question that this guide doesn't answer and isn't discussed in the online tutorial or e-help Solution Advisor. Who can I contact to add my question to the guide?

A: Kenneth.D.Kurtz@irs.gov

23. Who is the e-services lead for Registration?

A: Thomas.M.Parisi@irs.gov

e-help Desk FAQ Appendix

Registration Password Assistance Procedures

I. Password Not Expired

e-services passwords are valid for 180 days. Users begin receiving pop-up messages when signing on 15 days before expiration, reminding them to change their passwords. Ten days before password expiration, the system generates an email message alerting users to the pending expiration.

Callers should be directed to the Registration Services link on the RUP Welcome Page and told to select the Change Password or PIN link. Users are asked to enter their current password and to select a new password. The new password is effective immediately and users' access to the e-service incentive products is not interrupted. Users will not need a new confirmation number and do not have to select a new PIN.

The rules for selecting a new password can be found by selecting "Help" and clicking on the Field Definitions link. Even with this guidance, some users will still have problems selecting an acceptable password. Common errors are attempts to use a password containing portions of the username and attempts to use a password that was the same or similar to one used in any of the previous five passwords. You can assist callers by suggesting methods for selecting acceptable passwords. For example, you can suggest combining their zip codes with the first name of a brother or sister (e.g. 94217susan) or the month and year of their date of birth (e.g. june1955).

II. Password Expired

Users who do not obtain a new password before theirs expires will not be able to log in to e-services. They must also access Registration Services; however they are required to use the Forgotten Password or PIN link. A future enhancement will be to rename this link Expired or Forgotten Password or PIN to eliminate any ambiguity about which utility to use.

In this application, users are required to enter their Username, Last Name, SSN, Date of Birth, and AGI. Note: the AGI does not have to be the same year used during their initial registration. Users then select a new password and PIN, using the same rules referenced above. The password rules are more easily viewed in this section, with a direct link to the rules right on the application page. If callers have difficulty selecting a usable password, suggestions for assisting them are discussed above.

In the case of a forgotten or expired password, a new confirmation letter is generated and users will not have access to the incentive products until the confirmation code is received and entered.

III. General Provisions

There are no known systemic or software problems that would prevent users who follow the password selection rules from successfully changing or selecting new passwords on the first attempt. If callers are still unsuccessful and request your assistance, please attempt the suggested solutions discussed above. Avoid using the Reset Password utility. This is intended primarily for the new paper registration exception process. However, if you have tried everything you can to assist the caller, and the password process is still not successful, you may manually reset a password using the utility. When using this method you must provide detailed narratives in the Comments section of the Maintain Registration function and in the e-case Remarks section explaining what password selections were unsuccessful and what efforts you made to assist the caller in this process. All cases in which the Password Reset utility is used are subject to review by the Registration Analyst (REG ANA) group. Help desk password resets should be restricted to "*absolute last resort*" situations and used only in the interests of maintaining customer relations. All Registration Services, including password selection services, are designed to be **Self-Service Utilities**, specifically to minimize help desk impact and workload. Please do not undermine the self-service aspect of e-services by creating a help desk clientele that finds it easier to call you than to do things for themselves.

Never use the Maintain Registration function to revoke access. This does not eliminate any problems and does not allow a user to re-register.

Do not call Martinsburg (MCC) to reset passwords. They do not have to ability to restore trouble-free, full functionality.