

Setting-up your EFIN

ProConnect Tax Online is committed to supporting the IRS and State agencies to prevent tax-related identity theft and fraud. Verification of EFIN status is required before eFile.

New ProConnect Tax Online Professionals

1 Become an authorized e-file provider

1. Go to www.irs.gov, then select **e-Services for Tax Professionals**.
2. Click on **e-file Provider** on the left.
3. Then, select **Become an Authorized e-file Provider**. Follow steps outlined.
 - a. Create an IRS e-services account.
 - b. Submit your application.
 - c. Pass the suitability check.

2 Download your approved EFIN application summary

1. Once approved, **sign in** to your e-Services account and select your **organization**.
2. Select **View/Edit** and you will be directed to your **EFIN Application Summary**.
3. Verify that your firm information is correct. *Your business and physical address onfile with the IRS must match your firm information in ProConnect Tax Online!*
4. Click **Print** and print to **.pdf format**.
5. Save .pdf file using the file name **CAN XXXXXX EFIN Application Summary.pdf**.

Note: To find your Customer Account Number (CAN) select **About Your ProConnect Tax** from the **gear icon** in ProConnect Tax Online.

3 Submit your EFIN Application Summary

1. Go to www.accountants.intuit.com, click on **Dashboard**.
2. Select the **Account** drop down then **Account Details**.
3. Click **Upload** under the EFIN section.
4. Enter your information on the form.
5. Select the file to **upload** showing your **EFIN Application Summary**
6. Agree to the **terms and conditions** at the bottom of the form.
7. Click **Submit**.

EFIN Rrequirements for e-Filing

- One EFIN Per Firm Physical Location (as defined in IRS Pub. 3112).
- One Intuit Customer Account Number (CAN) Per Enrolled EFIN required.
- If more than one Firm shares a single Physical Location, Each Firm must have a separate Licensed Intuit CAN and a separate EFIN.
- Firm Name (DBA Name), Firm Physical Address, EFIN, and ERO Contact on the EFIN Application must match Software Licensed Firm Name and Physical Address, EFIN, and Contact Name.
- The EFIN status on the EFIN Application must be Active.
- The ERO status on the EFIN Application must be Accepted.