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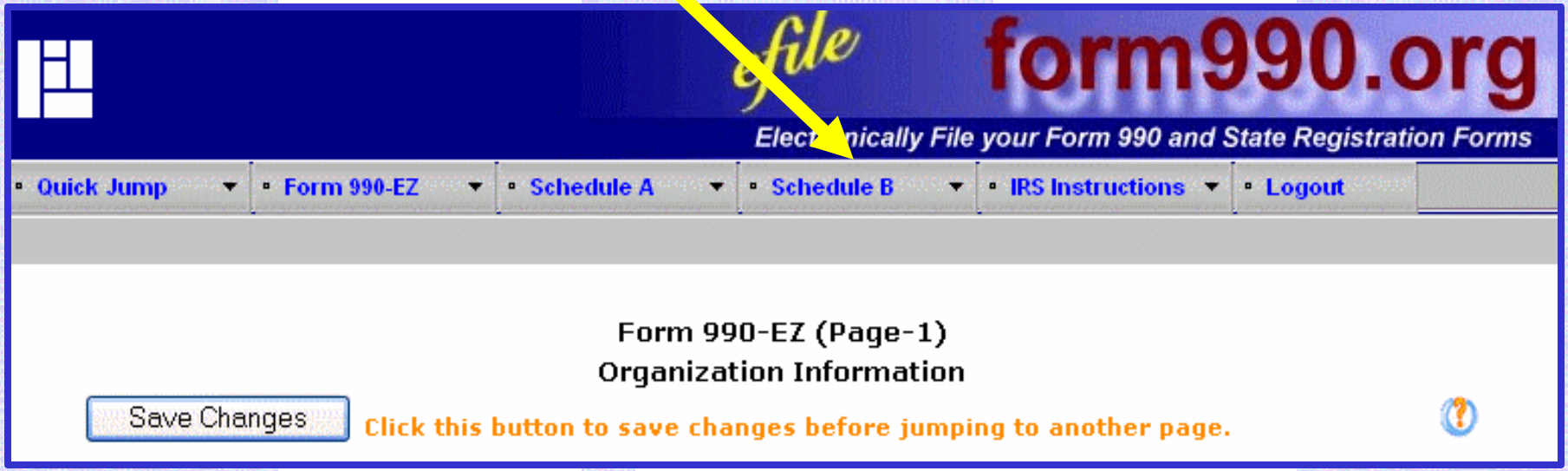
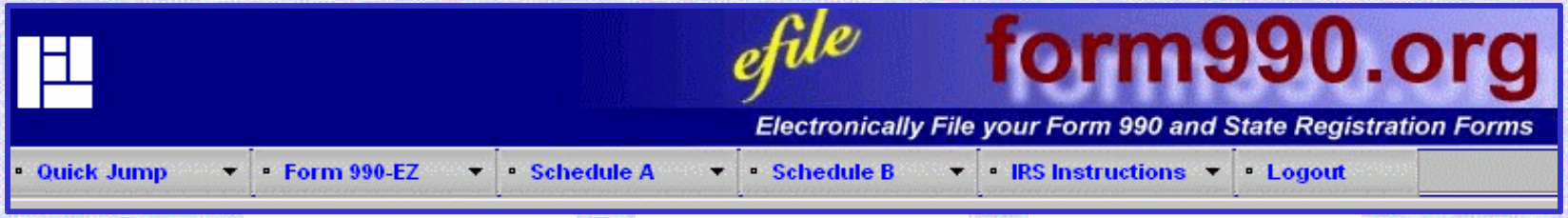
Overview of the *Form 990 Online* E-Filing System

A free tool for nonprofit organizations from the nonprofit National Center for Charitable Statistics at the Urban Institute (Washington, DC)

Drop-down banner menus provide easy navigation from any screen to all Form 990 or 990-EZ sections, schedules, attachments, and instructions.





Manage, verify, and view all returns with Quick Jump access.

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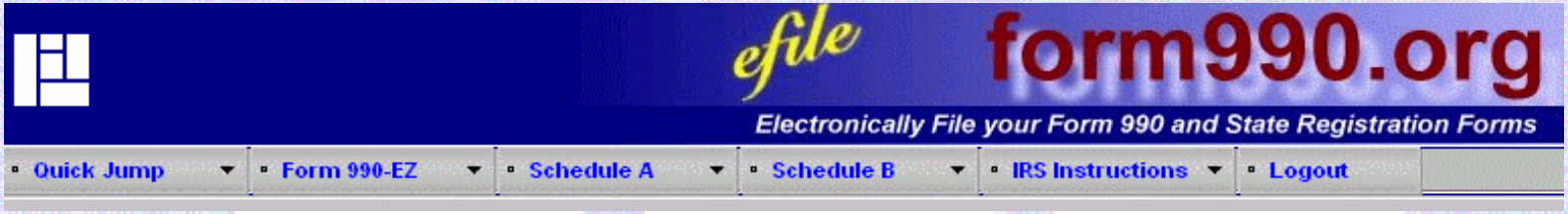
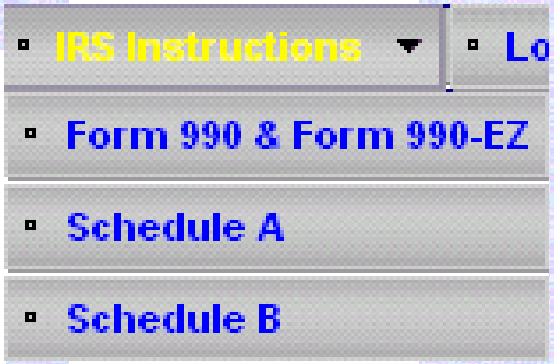
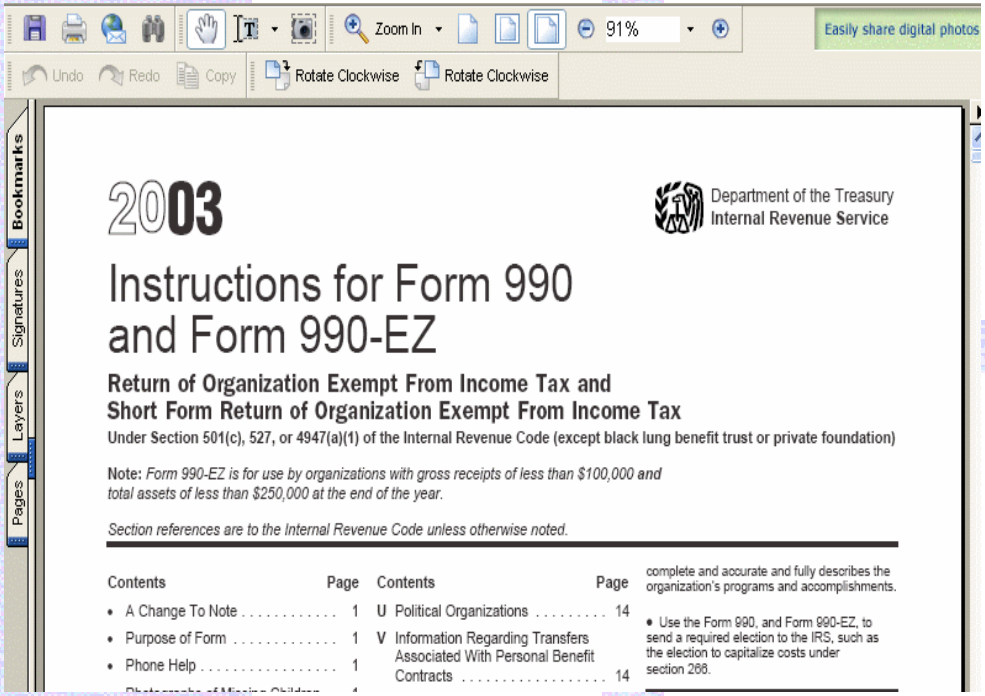
Access and edit any section of Form 990 or 990-EZ any time, including relevant statements and attachments.

Users are guided through sections of the Form 990, 990-EZ and Schedules A & B that only pertain to their nonprofit organization.

IRS instructions are available from any screen.







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The Control Panel offers a convenient way to create, access, and manage multiple returns.

ACME Charity, Inc.

Important Tips! Please Read.

a) The changes you made on a page will not be saved if you use browser's "Back" or "Forward" buttons. You should use "Next" and "Previous" buttons on the pages for navigation.

b) If your browser is inactive for 30 minutes you will automatically be logged out of the system and you will lose any unsaved information you may have entered. You will receive a warning two minutes before your session is closed. To avoid this, please save your data frequently.

No.	Delete	Tax Year	Start Date	End Date	Created On	Amended	Status	View PDF	Action
1.	☐	2003	1/1/2003	12/31/2003	2/25/2004	No	Verified	View	Edit or Verify

Delete Checked Items

- Create New Return

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Filing requirements are identified prior to creating a new return.

Form 990 or Form 990-EZ Requirements:

This website allows you to enter and electronically file a Form 990-EZ. Please answer the following questions to see if you are eligible to enter a Form 990-EZ (rather than a full Form 990).

	Line	Yes/No
1 Did your organization have Gross Receipts of $100,000 or more?	1	No
2 Does your organization have assets of $250,000 or more?	2	No
3 Did your organization have unrelated business gross income of $1,000 or more?	3	No
Only for 501(c)(4), 501(c)(5) or 501(c)(6) Organizations:		
4 Was your organization subject to the Lobbying Proxy Tax (section 6033(e) of the IRS Code)?	4	NA

If you answered "No" or "NA" to all these questions, your organization may file a Form 990-EZ.

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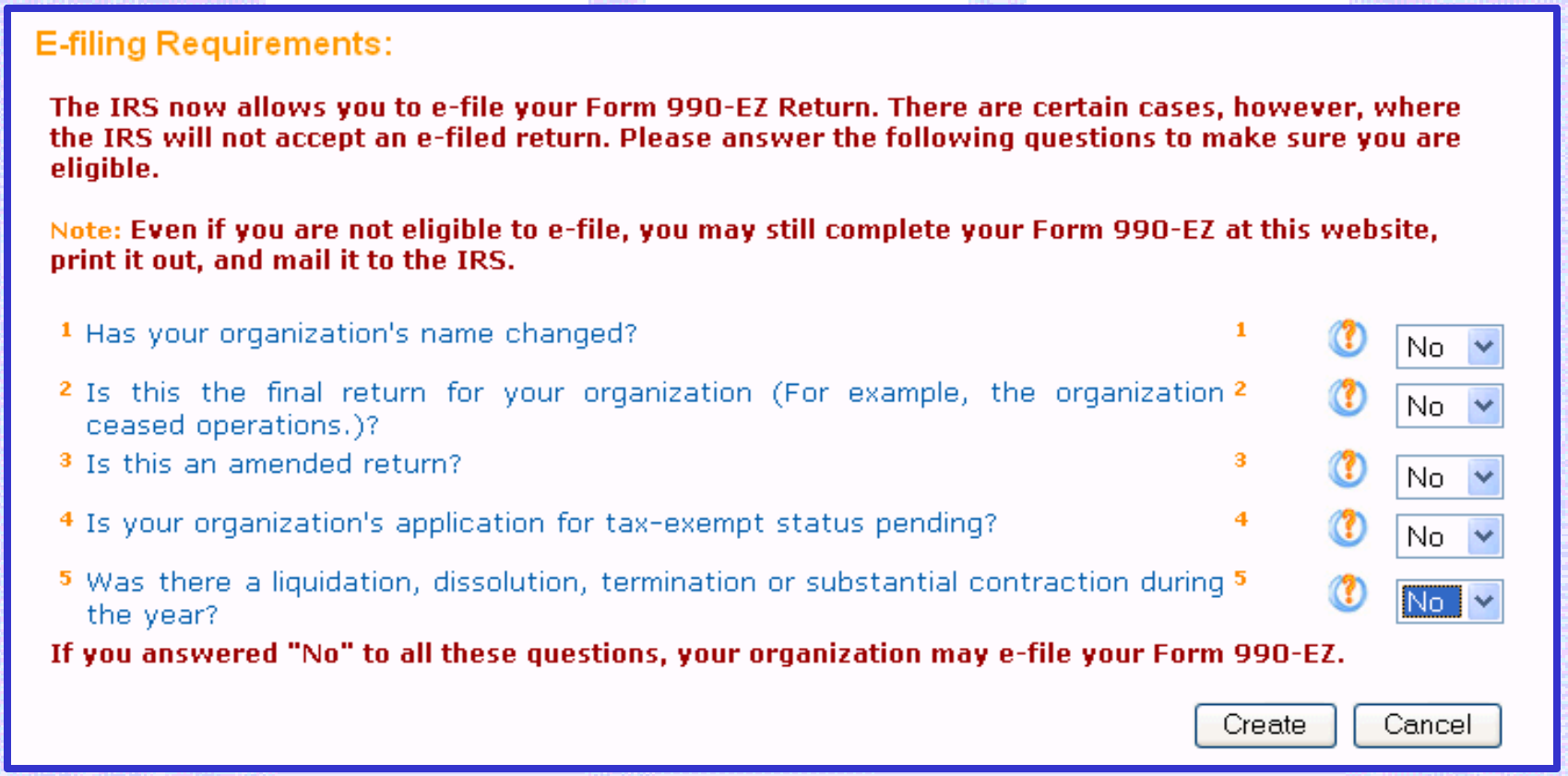
The option to e-file is determined for each return. Any 990-EZ return can be completed and mailed to the IRS, regardless of e-filing eligibility.



E-filing Requirements:

The IRS now allows you to e-file your Form 990-EZ Return. There are certain cases, however, where the IRS will not accept an e-filed return. Please answer the following questions to make sure you are eligible.

Note: **Even if you are not eligible to e-file, you may still complete your Form 990-EZ at this website, print it out, and mail it to the IRS.**

1 Has your organization's name changed?	1	No
2 Is this the final return for your organization (For example, the organization ceased operations.)?	2	No
3 Is this an amended return?	3	No
4 Is your organization's application for tax-exempt status pending?	4	No
5 Was there a liquidation, dissolution, termination or substantial contraction during the year?	5	No

If you answered "No" to all these questions, your organization may e-file your Form 990-EZ.

Create Cancel

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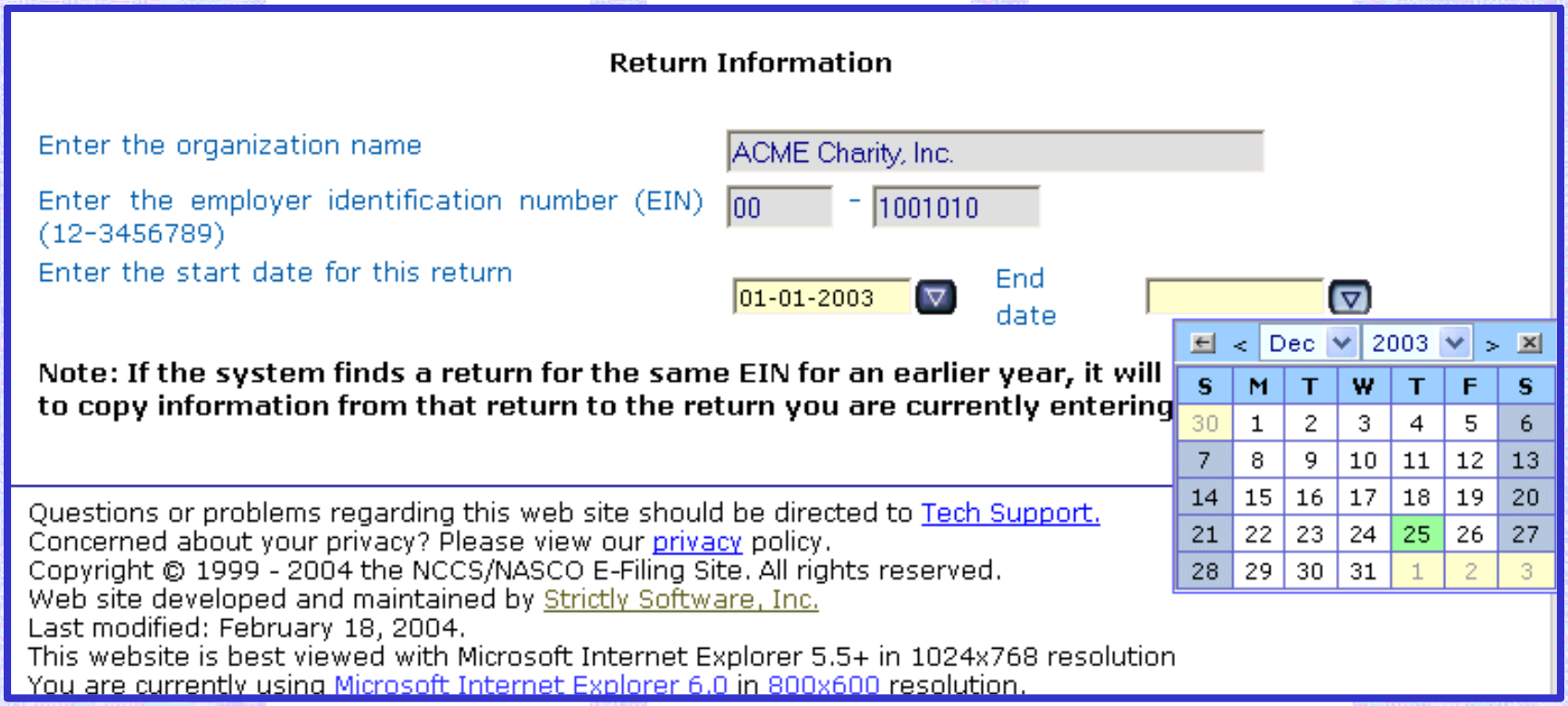
990 return information can be carried from one year to the next. Data entry is simplified with drop-down menus, calculated fields, and on-line help.



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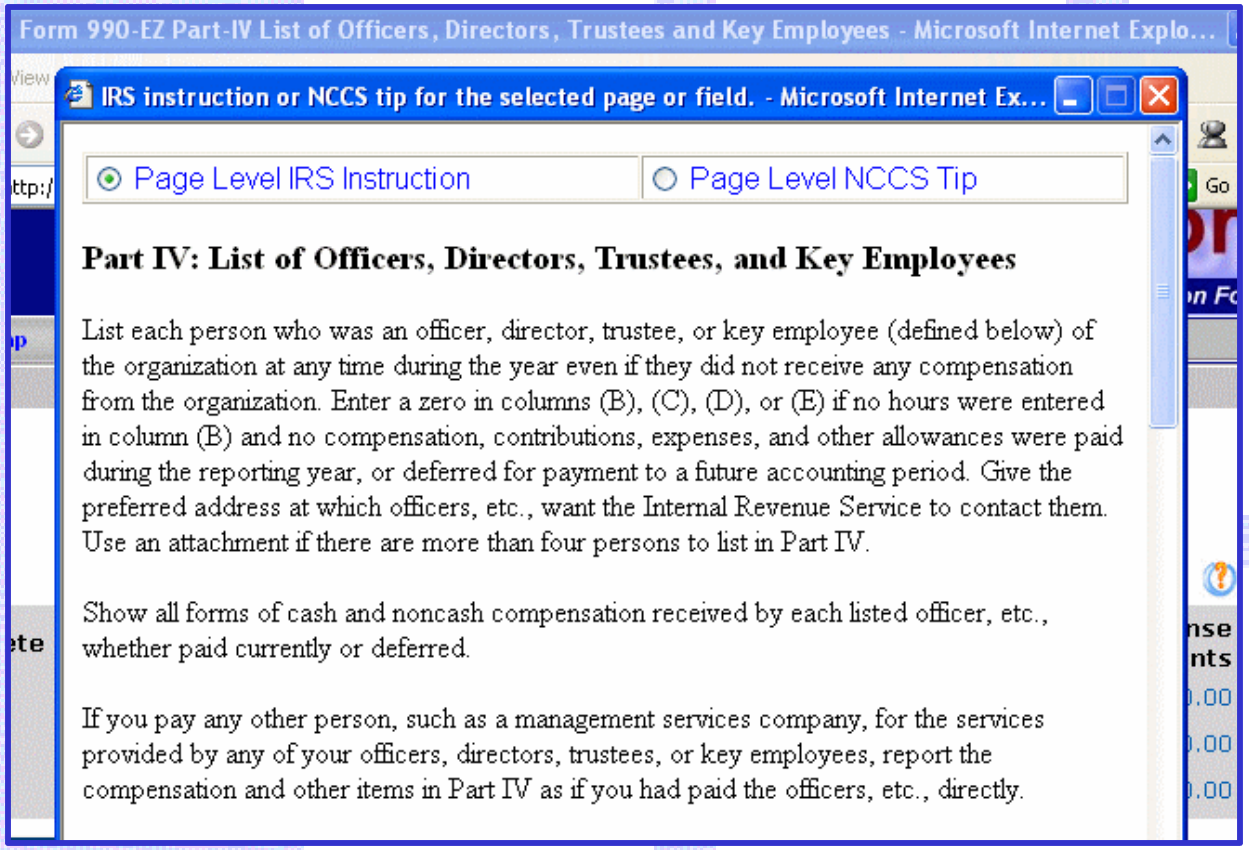

Page and line-specific IRS instructions and expert tips are provided on every screen by clicking on the orange question mark.

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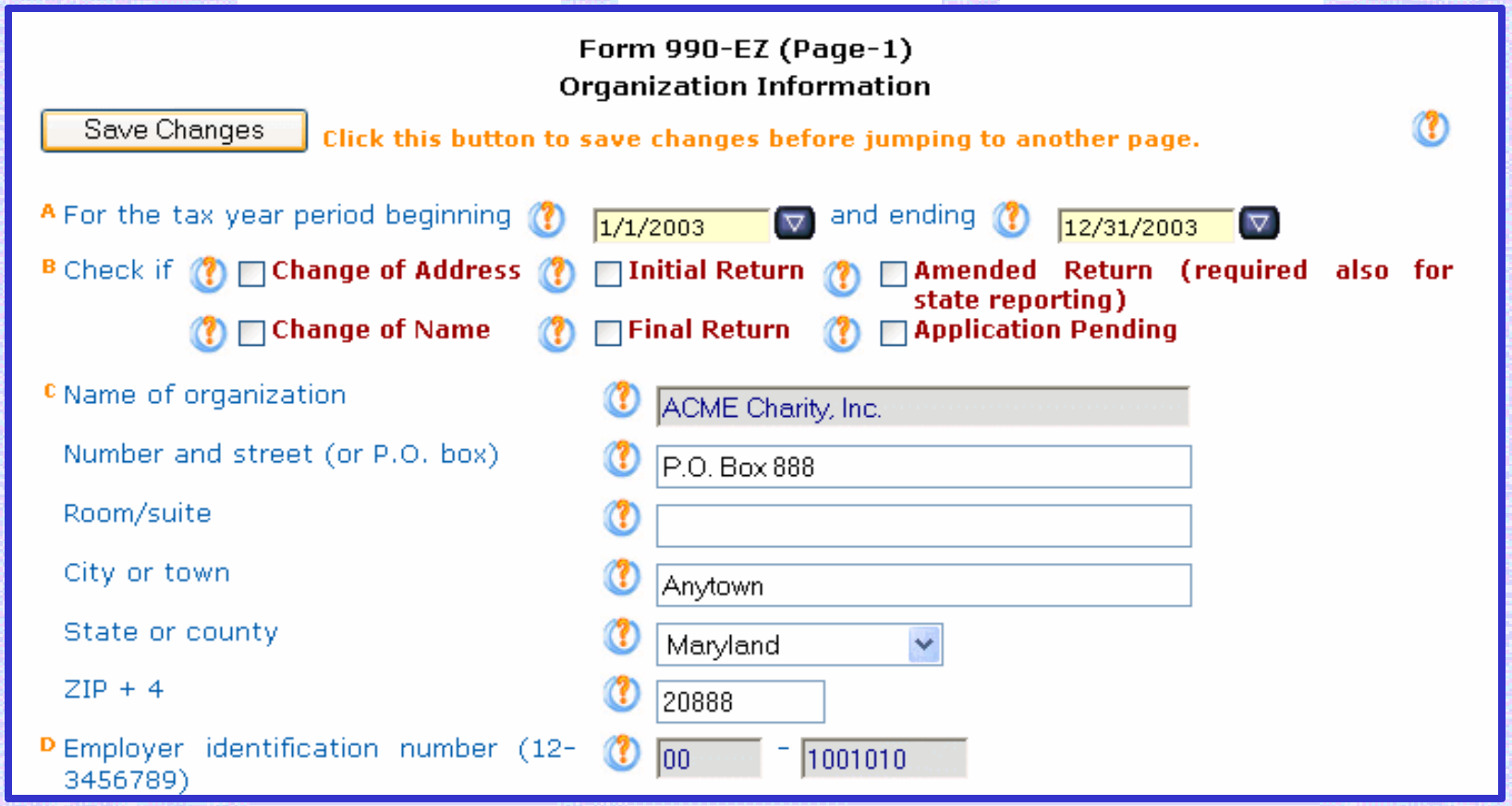
Questions are presented in same order as the 990 or 990-EZ return. Users can save changes any time to exit and return to a section.



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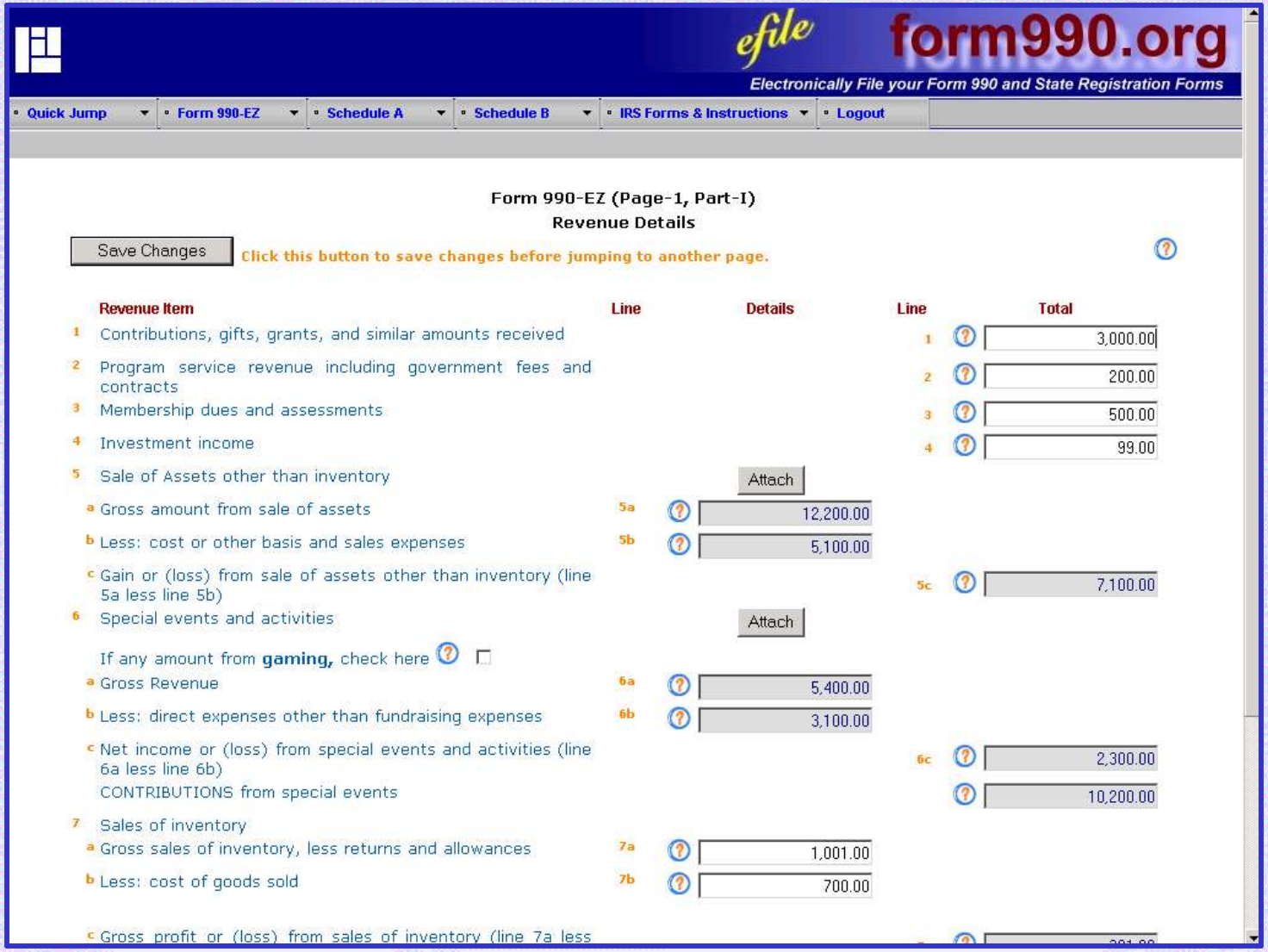
Sample of 990-EZ, Part I, Revenues Section



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Quick Jump | Form 990-EZ | Schedule A | Schedule B | IRS Forms & Instructions | Logout

Form 990-EZ (Page-1, Part-I)
Revenue Details

Save Changes Click this button to save changes before jumping to another page.

	Revenue Item	Line	Details	Line	Total
1	Contributions, gifts, grants, and similar amounts received			1	3,000.00
2	Program service revenue including government fees and contracts			2	200.00
3	Membership dues and assessments			3	500.00
4	Investment income			4	99.00
5	Sale of Assets other than inventory		Attach		
a	Gross amount from sale of assets	5a	12,200.00		
b	Less: cost or other basis and sales expenses	5b	5,100.00		
c	Gain or (loss) from sale of assets other than inventory (line 5a less line 5b)			5c	7,100.00
6	Special events and activities		Attach		
	If any amount from **gaming,** check here ☐				
a	Gross Revenue	6a	5,400.00		
b	Less: direct expenses other than fundraising expenses	6b	3,100.00		
c	Net income or (loss) from special events and activities (line 6a less line 6b)			6c	2,300.00
	CONTRIBUTIONS from special events				10,200.00
7	Sales of inventory				
a	Gross sales of inventory, less returns and allowances	7a	1,001.00		
b	Less: cost of goods sold	7b	700.00		
c	Gross profit or (loss) from sales of inventory (line 7a less				

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Sample of 990-EZ, Part I, Lines 5a-c Schedule of Gain (Loss) from Sale of Assets

Form 990EZ (Page-1, Part-I, Line-5)
Sales of Assets Other than Inventory

Delete	Type	Description	Net Gain
☐	NonInventory Asset	Delivery Van	1,170.00

Delete Checked Items

Complete form below and click "Add New Details" to save.

1 Type of Asset	1	
2 Description	2	
3 Sales Price	3	0.00
4 Date Sold	4	
5 Name of Business or Individual	5	
6 Sold to (Business or Individual)	6	
7 Expense of Sale/Cost of Improvement	7	0.00
8 Cost or Value when acquired	8	0.00

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Sample of 990-EZ, Part I, Lines 6a-c
Schedule of Special Events and Activities

Form 990EZ (Page-1, Part-I, Line-6)
Special Events and Activities

Delete	Description	Receipts	Revenue	Expenses	Net
☐	Golf Tournament	7,000.00	4,500.00	1,500.00	3,000.00

Delete Checked Items

Complete form below and click "Add New Details" to save.

Description

Gross Receipts (includes Gross Rev. and Contributions) 0.00

Contributions 0.00

Gross Revenue 0.00

Direct Expenses 0.00

Net Income (Loss) 0.00

Add New Details | Clear

Return to Part I

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Sample of 990-EZ, Part I, Expenses Section

Form 990-EZ (Page-1, Part-I)

Expenses Details

Save Changes Click this button to save changes before jumping to another page.

Expense Item	Details	Line	Total
10 Grants and similar amounts paid (attach schedule)	Attach	10	5,000.00
11 Benefits paid to or for members		11	0.00
12 Salaries, other compensation, and employee benefits		12	0.00
13 Professional fees and other payments to independent contractors		13	1,200.00
14 Occupancy, rent, utilities, and maintenance		14	6,000.00
15 Printing, publications, postage, and shipping		15	400.00
16 Other expenses (describe)	Attach	16	3,000.00
17 Total expenses (add lines 10 through 16)		17	15,600.00

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Sample of 990-EZ, Part I, Line 10
Schedule of Grants and Similar Amounts Paid

Form 990EZ (Page-1, Part-I, Line-10)
Grants and Similar Amounts Paid

Name	Type	Amount

Complete form below and click "Add New Details" to save.

1 Grant / Allocation Type	1	Cash
2 Number of Individuals	2	5
3 Grant Amount	3	5,000.00
4 Classification	4	Summer Camp Scholarships
5 Name	5	Anytown Youth Club
6 Type of Name	6	Business
7 Country	7	United States
8 Address	8	123 Main Street
9 City	9	Anytown
10 State	10	Maryland
11 Zip	11	20888

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Net Assets and other calculated fields are displayed for review.

Form 990-EZ (Page-1, Part-I)

Net Assets or Fund Balances Detail

	Asset Item	Line	Details	Total
18	Excess or (deficit) for the year (line 9 less line 17)	18		1,020.00
19	Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return)	19		6,500.00
20	Other changes in net assets or fund balances (attach explanation)	20	Attach	0.00
21	Net assets or fund balances at end of year (combine lines 18 through 20)	21		7,520.00

< Previous Next >

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Sample of 990-EZ, Part II, Balance Sheets Section

Form 990-EZ (Page-1, Part-II)
(Balance Sheet Details)

Save Changes Click this button to save changes before jumping to another page.

		(A) Beginning of the year		(B) End of the year	Details
22	Cash, Savings and Investments	5,600.00	22	6,820.00	
23	Land and Buildings	0.00	23	0.00	
24	Other Assets	2,100.00	24	700.00	Attach
25	Total Assets	7,700.00	25	7,520.00	
26	Liabilities	1,200.00	26	200.00	Attach
27	Net Assets or Fund Balances	6,500.00	27	7,320.00	
	Total Liabilities and Net Assets	7,700.00		7,520.00	

< Previous Next >

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Sample of 990-EZ, Part IV
List of Officers, Directors, Trustees and Key Employees

Form 990-EZ (Page-2, Part-IV)
List of Officers, Directors, Trustees and Key Employees
List each one even if not compensated.

Delete	Name	Title	Hours	Compensation	Expense Accounts
☐	Jennifer Winger	Treasurer	15.00	0.00	0.00
☐	Ronald Smith	President	5.00	0.00	0.00

Delete Checked Items

Complete form below and click "Add New Details" to save.

1 Name: Thomas Harrison
2 Title: Secretary
3 Country: United States
4 Address: P.O. Box 888
5 City: Anytown

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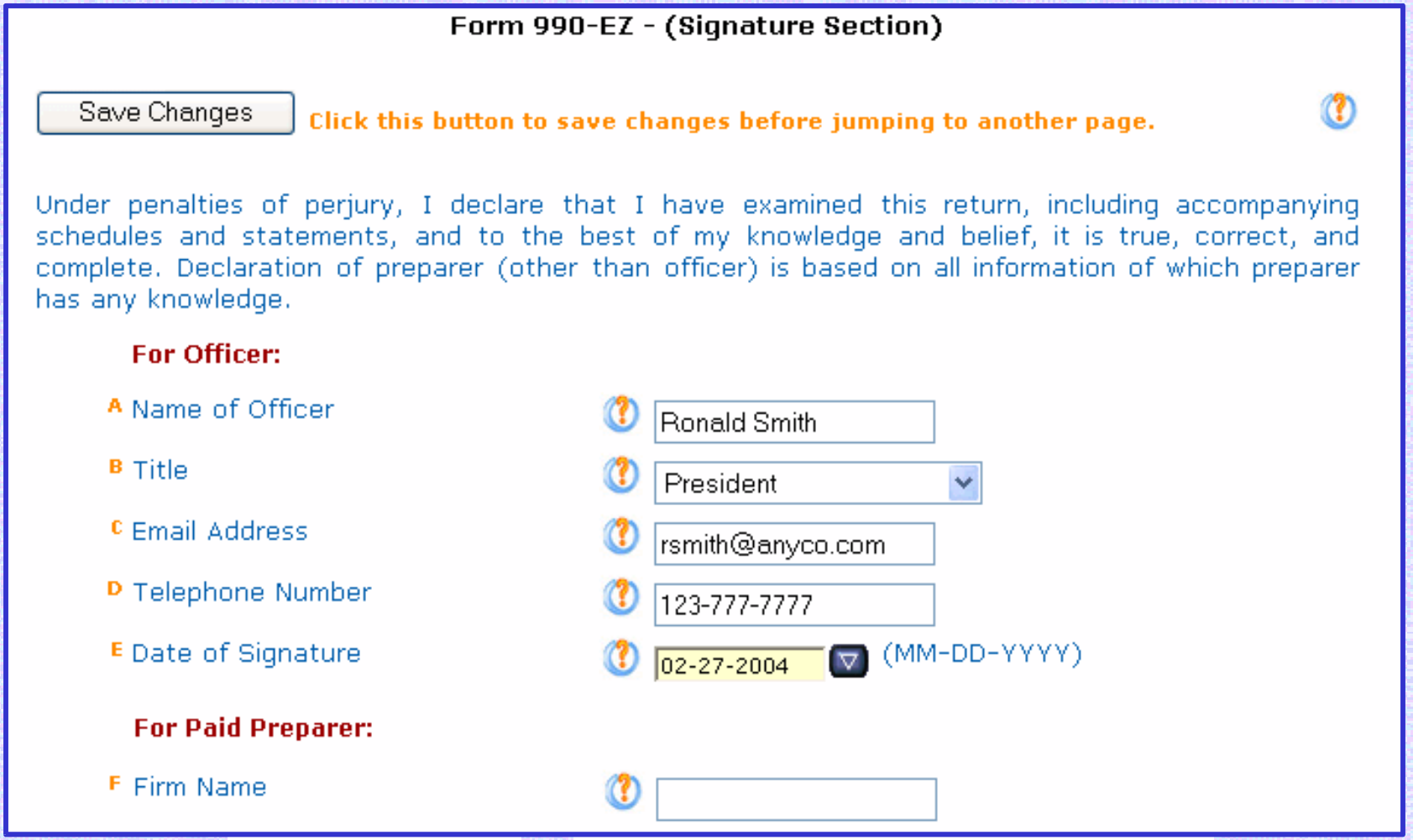
Sample of Signature Section



Form 990-EZ - (Signature Section)

Save Changes Click this button to save changes before jumping to another page.

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

For Officer:

A Name of Officer: Ronald Smith

B Title: President

C Email Address: rsmith@anyco.com

D Telephone Number: 123-777-7777

E Date of Signature: 02-27-2004 (MM-DD-YYYY)

For Paid Preparer:

F Firm Name:

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Users are guided through relevant sections of Schedule A based on their answers on Part IV.

Schedule A Part IV
Reason for Non-Private Foundation Status

Save Changes Click this button to save changes before jumping to another page.

The organization is not a private foundation because it is:

5 ○ A church, convention of churches, or association of churches. Section 170(b)(1)(A)(i).

6 ○ A school. Section 170(b)(1)(A)(ii). (Also complete Part V.)

7 ○ A hospital or a cooperative hospital service organization. Section 170(b)(1)(A)(iii).

8 ○ A Federal, state, or local government or governmental unit. Section 170(b)(1)(A)(v).

9 ○ A medical research organization operated in conjunction with a hospital. Section 170(b)(1)(A)(iii).

Hospital Name	City	State

10 ○ An organization operated for the benefit of a college or university owned or operated by a governmental unit. Section 170(b)(1)(A)(iv). (Also complete the Support Schedule in Part IV-A.)

11 a ○ An organization that normally receives a substantial part of its support from a governmental unit or from the general public. Section 170(b)(1)(A)(vi). (Also complete the Support Schedule in Part IV-A.)

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Sample of Schedule B, Part I
List of Contributors

Schedule B

Delete	Name	Address	City	Amount
☐	Penny Lane	Winding Road	Anytown	2,500.00

Delete Checked Items

Schedule B - Part I
Contributors

(a) Number 2

(b) Name of contributor: Art Kraft

Contributor's Country: United States

Contributor's Address: Stickley Drive

Contributor's City/Town: Anytown

Contributor's State: Maryland

Contributor's ZIP: 20888

(c) Aggregate contributions: 200.00

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Upload lists from Excel into Schedule B & some attachments

Upload Attachment - "Schedule B - Part I, Part II and Part III"

Please select the Excel file to upload: [ ] Browse...

Submit Cancel

Right click the "Download Template" link and then select "Save Target As" to download an Excel template file for the attachment "Schedule B - Part I, Part II and Part III". The Template contains the required column headers for the import spreadsheet.

Download Template

Please click the "Attachment Tips" button for additional help and information about the Attachment Import Utility.

Attachment Tips

The table below displays the Excel file format for the attachment "Schedule B - Part I, Part II and Part III":

Column Name	Column Header Name	Column Data Type	Predefined Values
A	Type Of Name	Text	'Person' Or 'Business' Or 'pd527(j)(1)'
B	Name	Text	
C	Address	Text	
D	City	Text	
E	State	Text	
F	Zip	Text	
G	Contributions	Numeric	

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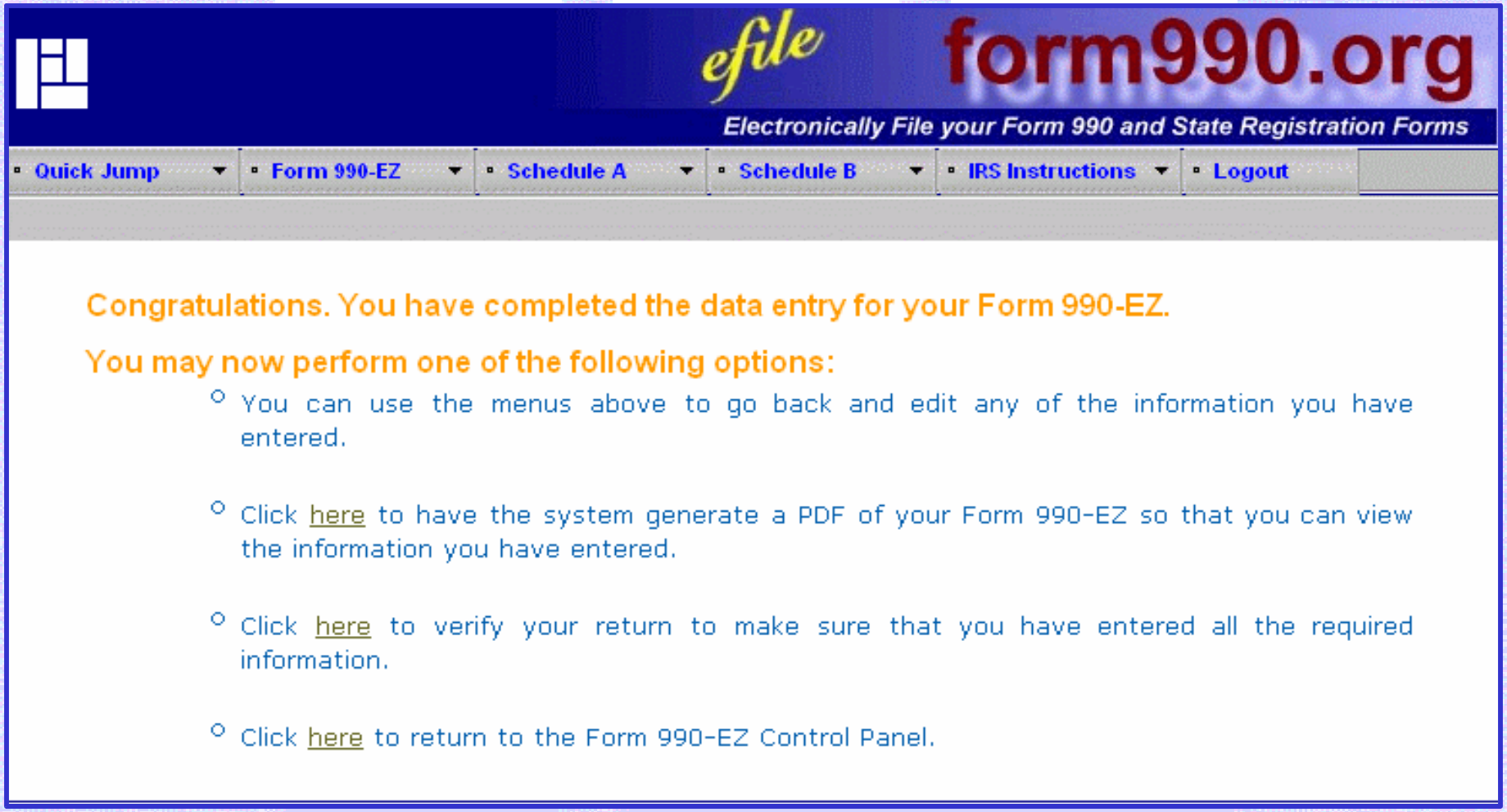
Users are prompted to view and verify the return once all relevant sections are complete.



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The verification process identifies errors and omissions, prompting the user to make corrections prior to filing the return.

Verifying Required Information . . .

REQUIRED INFORMATION VERIFICATION COMPLETE - STATUS: SUCCESS

Verifying Data Integrity . . .

DATA INTEGRITY CHECK COMPLETE - STATUS: SUCCESS

Verifying Attachments . . .

Unused attachment deleted: Form: 990 Part: Question: Page:
Action Required: No

ATTACHMENT VERIFICATION COMPLETE - STATUS: SUCCESS

The verification of this return was successful.
Now you can mark this return as complete or choose any action from the following links.

Go to Control Panel Edit This Return Verify This Return Mark This Return As Complete

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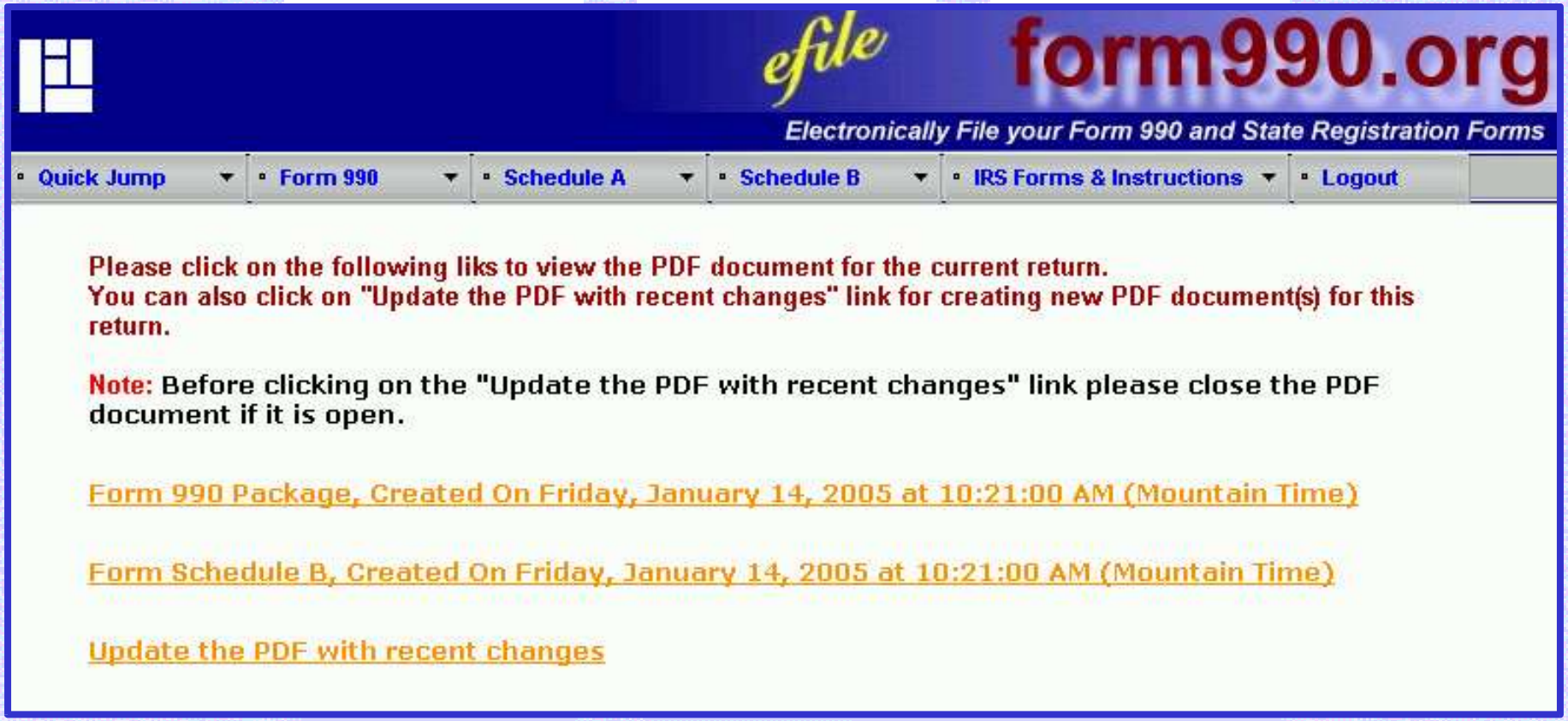
The completed Form 990 or 990-EZ with all attachments and schedules is viewed and downloaded as a PDF file. Users can print and mail the return to the IRS, or file electronically if eligible.



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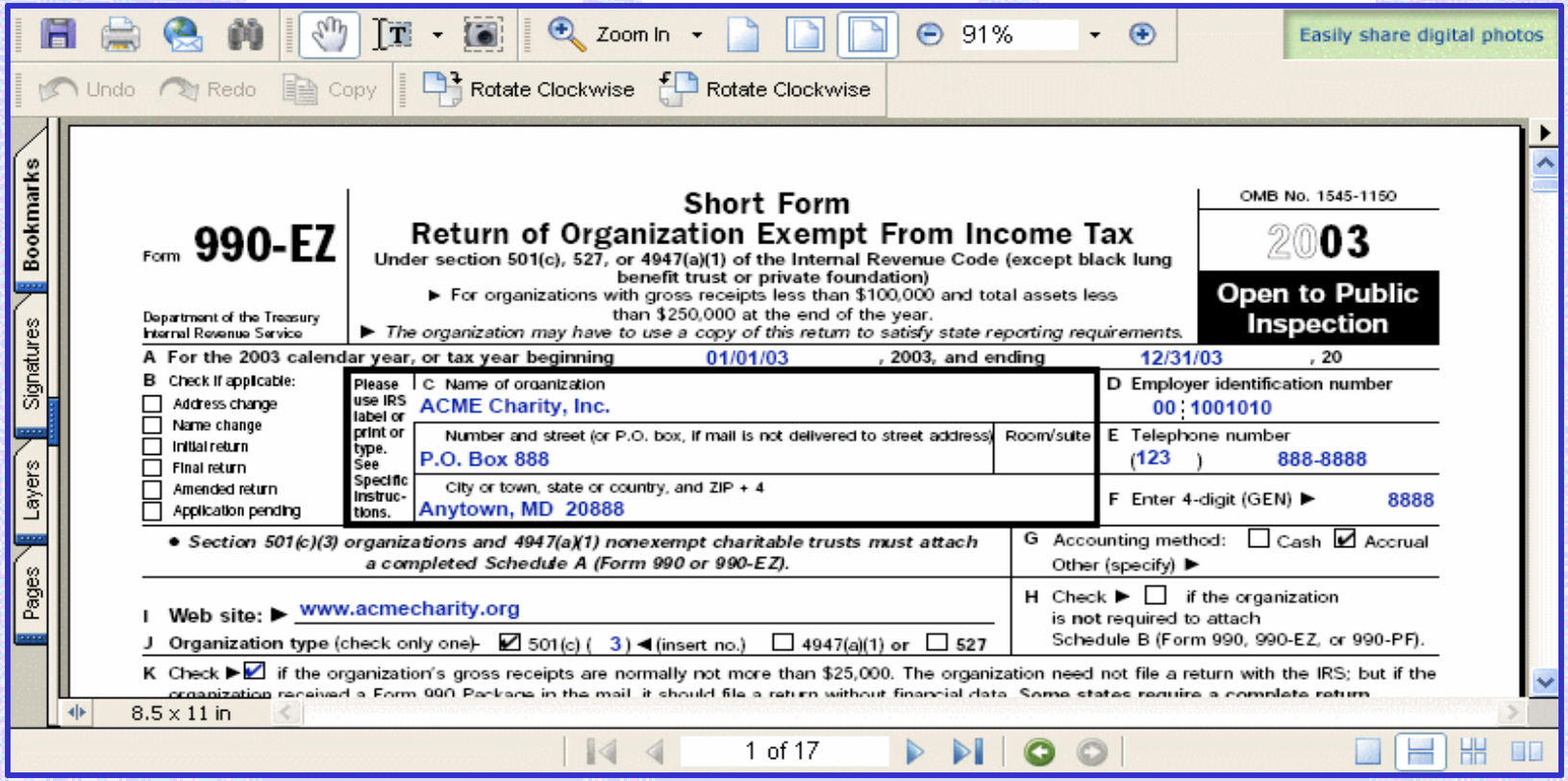

You will receive an e-mail notification when your return is sent to the IRS and another when it is accepted.

From: **efiletechsupport@urban.org**
Sent: Wednesday, January 12, 2005 11:18 AM
To: jane.Cfo@goodworks.org
Subject: **Form 990-EZ E-filing Reciept - IRS Status: Accepted**

Organization: Good Works, Inc.
EIN: 99-0123456
Return Type: Form 990-EZ
Return Year: 2003
IRS Return ID: 1111111111111c002228
Return Timestamp: 1/12/2005 11:13:40 AM
IRS Accepted Date: 1/12/2005 11:15:00 AM

Thank you for using the Form 990 Online system for preparing and electronically filing your Form 990 EZ return. This email contains some important identifying information about the return we transmitted. You may want to keep this email in case you need to contact the IRS regarding your return.

The return described above was transmitted to the IRS. The IRS has ACCEPTED the return. Congratulations.

NOTE: The IRS does NOT reject returns for being late. If this return was transmitted to the IRS after the due date, and your organization has not filed a Form 8868 (Request for Extension), you may receive a letter from the IRS indicating whether your organization owes any penalties or other fees.

Please visit http://efile.form990.org to stay informed of enhancements to our efiling systems.

Once again, thank you for using the Form 990-EZ Online system.

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e-file.form990.org technical support
Phone: 866-518-3874 (toll free)
email: efiletechsupport@urban.org