

Federal ID or EIN Online Process - Update 06.27.14.xlsx

(A) PROCESS WHEN ADDRESS SAME FOR GROUP AND RESPONSIBLE PERSON APPLYING FOR EIN	
*	Before you begin the process, gather the following information: Name of Responsible Person applying, social security number, phone number and physical address; Group Name and Group address if different from Responsible Party.
*	Most local banks (call first) will accept this Federal ID, along with minutes from your meeting indicating what your meeting is and persons identified to sign checks. This should alleviate the problem of having to have personal social security on file or going through process of tax exempt 501-C, which large corporate banks may require.
STEP	Directions for Each Step of the Process
1	OPEN BROWSER AND TYPE IN WWW.IRS.GOV
2	Under Hot Topics --- Click on --- APPLY FOR AN EMPLOYER ID NUMBER [READ PAGE FOR INFO]
3	Scroll down and near bottom --- Click on --- APPLY ONLINE NOW
4	Click on --- "BEGIN APPLICATION"
5	Select "View Additional Types, Including Tax-Exempt and Governmental Organizations" --- Click on --- CONTINUE
6	Additional Types: Select "COMMUNITY OR VOLUNTEER GROUP" --- Click on --- CONTINUE
7	Please Confirm your selection by Clicking on --- CONTINUE
8	Complete the form for the "Responsible Party" -- [a Social Security Number is required here, but this number does not show up on later printouts] --- On this page, also select under Choose One: the first selection --- Click On --- CONTINUE
9	Fill in where Responsible Party is located (Not the meeting location and not a PO Box) ---- [if the group address is the same as the responsible party, keep the default selection of no] --- Click on --- CONTINUE [Go to B Process Page if PO Box]
10	If you're asked to verify your physical Location, choose the appropriate answer [usually the database version] --- click on --- Accept as Entered OR Accept Database Version
11	Tell us about the Community or Volunteer Group. Fill in the official Group Name [used on your literature from WSO]; County and State info should be filled in. Type in month and year group started. Click on --- CONTINUE
12	Tell us more about the Community or Volunteer Group - select all no's on this page --- Click on --- CONTINUE
13	What does your business or organization do? Select other at bottom of page --- Click on --- CONTINUE
14	You have chosen "OTHER" on previous page, Select "Other" again and fill in the box "TWELVE STEP RECOVERY GROUP" (DO NOT USE NUMBERS, SPELL OUT) and click on --- CONTINUE
15	How would like to receive your EIN Confirmation Letter? Make your selection -- (If you select "Receive Letter Online", you have your number immediately). --- Click on --- CONTINUE
16	Review the summary information (Print this page for your records) Click on --- SUBMIT. If anything is wrong when you review, you will need to start over. The site does not allow you to to backwards.
17	Wait for response which may take a few minutes. Your EIN is assigned. Print this page out for your records. Click on --- CONTINUE
18	Additional Information is provided about using your EIN.
19	Session Ends [If the internet application doesn't work or you get timed out, just start over again. As long as you have not submitted the information, you are fine. Or you can call (800) 829-4933 and they will give you your EIN # and mail the details.

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(B) PROCESS WHEN ADDRESS NOT THE SAME FOR GROUP AND RESPONSIBLE PERSON APPLYING FOR EIN	
*	Before you begin the process, gather the following information: Name of Responsible Person applying, social security number, phone number and physical address; Group Name and Group address if different from Responsible Party.
*	Most local banks (call first) will accept this Federal ID, along with minutes from your meeting indicating what your meeting is and persons identified to sign checks. This should alleviate the problem of having to have personal social security on file or going through process of tax exempt 501-C, which large corporate banks may require.
Step	<u>Directions for Each Step of the Process</u>
1	OPEN BROWSER AND TYPE IN WWW.IRS.GOV
2	Under Hot Topics --- Click on --- APPLY FOR AN EMPLOYER ID NUMBER [READ PAGE FOR INFO]
3	Scroll Down and near bottom --- Click on --- "APPLY ONLINE NOW"
4	Click on --- "BEGIN APPLICATION"
5	Select "View Additional Types, Including Tax-Exempt and Governmental Organizations" --- Click on --- CONTINUE
6	Additional Types: Select "COMMUNITY OR VOLUNTEER GROUP" --- Click on --- CONTINUE
7	Please Confirm your selection by Clicking on --- CONTINUE
8	Complete the form for the "Responsible Party" -- [a Social Security Number is required here, but this number does not show up on later printouts] --- On this page, also select under Choose One: the first selection --- Click On --- CONTINUE
9	Fill in where Responsible Party is located (Not the meeting location) ---- [if the group has a mailing address, select the yes option] --- Click on --- CONTINUE
10	If you're asked to verify your physical Location, choose the appropriate answer [usually the database version] --- click on --- Accept as Entered OR Accept Database Version
11	Fill in the Mailing Address of the Responsible Party - This is the Group Mailing Address --- Click on --- CONTINUE
12	Tell us about the Community or Volunteer Group. Fill in the official Group Name [used on your literature from WSO]; County and State info may already be filled in. Type in month and year group started. Click on --- CONTINUE
13	Tell us more about the Community or Volunteer Group - select all no's on this page --- Click on --- CONTINUE
14	What does your business or organization do? Select other at bottom of page --- Click on --- CONTINUE
15	You have chosen "OTHER" on previous page, Select "Other" again and fill in the box "TWELVE STEP RECOVERY GROUP" (DO NOT USE NUMBERS, SPELL OUT) and click on --- CONTINUE
16	How would like to receive your EIN Confirmation Letter? Make your selection -- (If you select "Receive Letter Online", you have your number immediately). - Click On --- CONTINUE
17	Review the summary information (Print this page for your records) Click on --- SUBMIT
18	Wait for response which may take a few minutes. Your EIN is assigned. Print this page out for your records. Click on --- CONTINUE
19	Additional Information is provided about using your EIN.
20	Session Ends [If the internet application doesn't work or you get timed out, just start over again. As long as you have not submitted the information, you are fine. Or you can call (800) 829-4933 and they will give you your EIN # and mail the details.