



How to Sign-up & Check TIN Numbers

The Non-Stereo Instruction Version the IRS Doesn't Give You.

Start by getting your PTIN

- ▶ Go to <https://www.irs.gov/>
- ▶ Click on e-Services for Tax Professionals
- ▶ Go down to e-Services Secure Object Repository (SOR) Secure Mailbox
- ▶ And create new account
 - ▶ Read the first page and press continue (giving you the how long and general info on system.
 - ▶ The 3 next pages gives you the list of what you will need. Get info and click yes and continue
 - ▶ Enter your info and your associations information and verify as needed. You will need your associations TIN number. (Your user name is your email address)
 - ▶ They will give you your TPIN number (mine was 1 letter and 8 numbers long)

THIS IS LINKING YOU TO YOUR ASSOCIATION & YOU WILL NEED TO RENEW YEARLY



Get Your Login for Taxpayer Identification Number (TIN) Matching

- ▶ Go back to the e-services screen on the IRS website.
- ▶ Scroll down to Taxpayer Identification Number (TIN) Matching. Press GO.
- ▶ Click on Create Account.
- ▶ Read and get the needed information it states you need and click Continue or Yes through the first through screens till you hit "Let's Get Started"
- ▶ Enter your information. Multiple times it will ask for confirmations. They will send emails to the addresses given, texted to your phone, etc.
 - ▶ You may have to wait to get the full permissions for your login.



After Your Permissions Are Granted What Is Next?

- ▶ On IRS.Gov go to the e-services and down to Taxpayer Identification Number (TIN) Matching, click Go and enter in your login.
 - ▶ You will need your cell phone handy as it will send a verification code to continue login process each time you login.
- ▶ You will need to set up your Association and yourself (if anyone else also has a PTIN you can link them as well to the Association. You have to set up 1 person to the Association to get complete the process.
- ▶ At the end as part of the signing process it will ask you for your pin. Unless you were click extra tabs when signing up you have not setup one. Don't worry you can still do it.
 - ▶ On the top of the page you will see a tab for a PIN. Click on it and choose set up a pin.
- ▶ After setting up the pin put it in as your signature. It may take a day or so to get everything linked and approved.



Start Checking Your Pins

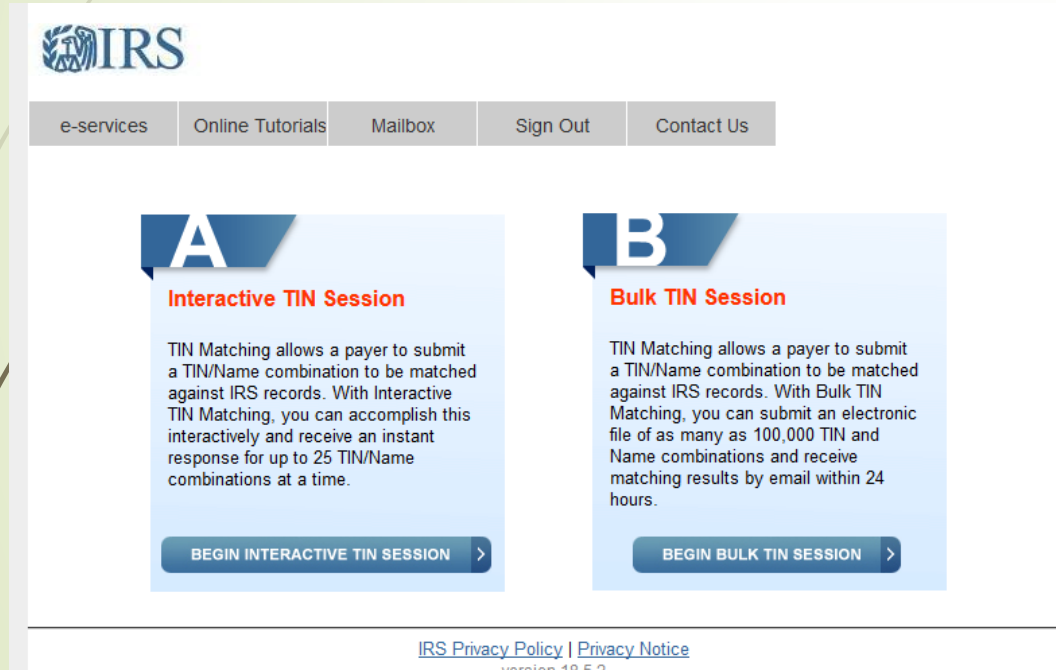
- ▶ Go back into the TIN match on the e-Service screen and Login
- ▶ It will ask you to pick who you are checking for individual or it will have your Association on the second line. Click the Association.
- ▶ It will then bring you to the agreement page. (It does this each time)
 - ▶ Read
 - ▶ You must agree to get to the TIN check.

Choices, Choices

Which TIN Session do I want to pick?

It all depends on how many you have

What you see



The screenshot shows the IRS website's TIN Matching interface. At the top left is the IRS logo. A navigation bar contains links for e-services, Online Tutorials, Mailbox, Sign Out, and Contact Us. Below this are two main options, A and B, each with a description and a 'BEGIN' button.

A
Interactive TIN Session
TIN Matching allows a payer to submit a TIN/Name combination to be matched against IRS records. With Interactive TIN Matching, you can accomplish this interactively and receive an instant response for up to 25 TIN/Name combinations at a time.
[BEGIN INTERACTIVE TIN SESSION >](#)

B
Bulk TIN Session
TIN Matching allows a payer to submit a TIN/Name combination to be matched against IRS records. With Bulk TIN Matching, you can submit an electronic file of as many as 100,000 TIN and Name combinations and receive matching results by email within 24 hours.
[BEGIN BULK TIN SESSION >](#)

[IRS Privacy Policy](#) | [Privacy Notice](#)
version 18.5.2

- If you are only checks a few at a time A would be your best choice.
 - You can check 25 at a time
 - It does allow you after you check 25 it allows you to go back and check another 25.
- If you have a lot to verify and do not need the response right now you can use B.
 - They will check for you and send you an e-mail verification.
 - May also want to use if you have a download from your system that can pull the information out.

Was your choice A?

This is what you see.


- For each entry you choice if it is a Tax ID Number (Company – No individual number) or if it is a Social Security Number
- Put in the number you were given on the W-9 in the.
- Type in the Company Name or Last Name given on the W-9
- Click Add
 - Below it will show you each person listed below.
- When you have 25 or all you need added click submit.
 - A screen will pull up showing in code if they match or what is wrong with each line.

The screenshot shows the IRS website interface for the 'Interactive TIN Session: Interactive Request'. At the top left is the IRS logo. A navigation bar contains links for 'e-services', 'Online Tutorials', 'Mailbox', 'Sign Out', and 'Contact Us'. The main heading is 'Interactive TIN Session: Interactive Request'. Below this is the instruction: 'Enter up to 25 Taxpayer Identification (TIN) and Name combinations in the fields provided.' The form is titled 'TIN and Name Combination' and includes three required fields: 'TIN Type' (a dropdown menu currently set to 'Unknown'), 'SSN/EIN' (an empty text box), and 'Last Name or Business Name' (an empty text box). Below the fields are two buttons: 'ADD' and 'CLEAR'. A message states 'Table is empty! Please add new items.' Underneath, a section titled 'When you have finished, you may:' contains two bullet points: 'Select *Cancel* to discard your work and return to the TIN Matching home page.' and 'Select *Submit* to perform the TIN Matching request.' At the bottom of the form are two buttons: 'CANCEL' and 'SUBMIT >'. The footer contains the text 'IRS Privacy Policy | Privacy Notice version 18.5.2'.

How about if you choose B?

- You can use a spreadsheet or download from your system to check up to 10,000 with B.
- Turn your file if not already into a .txt (text) file.
- Click Browse and add your file to this page.
- If your e-mail address on your profile is good you are ready to submit.
 - If not type in your optional email
- Hit Submit
- You will receive an e-mail with the codes showing if they match or what is wrong for each of your lines.

The screenshot shows the IRS Bulk TIN Session: Bulk Request web form. At the top left is the IRS logo. A navigation bar contains links for e-services, Online Tutorials, Mailbox, Sign Out, and Contact Us. The main heading is "Bulk TIN Session: Bulk Request". Below this is a text prompt: "Enter the file name of the .txt file containing the TIN/Name combinations to be matched." A "Browse..." button is followed by the text "No file selected." Below this is a paragraph of instructions: "IRS will notify you via email when the TIN Matching response has been placed in your secure mailbox. If you want this notification to be sent to another email address other than the one you provided when you submitted your application, type that address here." This is followed by a label "Optional Email Address" and an empty text input field. Below the input field is the heading "When you have finished, you may:" followed by two bullet points: "Select Cancel to discard your work and return to the TIN Matching home page." and "Select Submit to perform the TIN Matching request." At the bottom are two buttons: "CANCEL" and "SUBMIT" with a right-pointing arrow. At the very bottom of the page are links for "IRS Privacy Policy" and "Privacy Notice" and the version number "version 18.5.2".

 IRS

e-services Online Tutorials Mailbox Sign Out Contact Us

Bulk TIN Session: Bulk Request

Enter the file name of the .txt file containing the TIN/Name combinations to be matched.

No file selected.


IRS will notify you via email when the TIN Matching response has been placed in your secure mailbox. If you want this notification to be sent to another email address other than the one you provided when you submitted your application, type that address here.

Optional Email Address

When you have finished, you may:

- Select *Cancel* to discard your work and return to the TIN Matching home page.
- Select *Submit* to perform the TIN Matching request.

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Why Check Your W-9s Ahead Of Your 1099-Misc Filing?

- ▶ Help prevent getting notices after you send in the W-9 that this list of tax ID do not match. Get updated information or you must withhold taxes and turn them in.
- ▶ With being in areas where you have a melting pot of cultures that have more then first, middle and last name. This will help you make sure you have the matching last name to the tax ID when you are sending in their forms. Preventing the above confusion.
- ▶ It is much easier to stay ahead of the game rather then behind it. If you see who it looks like your going to need to report for ahead of Jan you are making sure there are no W-9 needed and in the month you have to issue and mail the 1099-Misc reports goes smoothly.