

Step-by-Step Instructions for chapters to complete the IRS on-line application for an EIN

The instructions look long, but it should only take 10 to 15 minutes to complete.

1. Go to www.irs.gov
2. Under “Online Services” on the left side of the IRS homepage, click on “Apply for EIN online”. It will take you to an introductory page titled, “Apply for an EIN Online”. Click on “Apply Now” near the bottom of that page.
3. You are now at the “EIN Assistant” page. Read the “Important Information” before you begin. Then click “Begin Application”.
4. You are now on the “What Type of Legal Structure” page. Click on the last option, “View Additional types, including tax-exempt and government organizations.”
5. You are now on the “Additional Types” page. Click on the last option, “other Non-Profit/Tax-exempt organization”. Then click “Continue”.
6. It will ask you to “Please confirm your selection”. Click “Continue”.
7. You are now in the “Why is the Non-Profit/Tax-Exempt Organization requesting an EIN?” page. Click on “Banking Purposes”, then click “Continue”.
8. On the “Responsible Party” page, click on “Individual”. Then click “Continue”.
9. Complete the form about the responsible individual from the chapter. The individual you choose to enter on the form should be a chapter officer, such as the chairman, vice chairman, or treasurer. It will require that person’s Social Security Number. Also check, “I am a responsible and duly authorized member or officer having knowledge of this organization’s affairs”. Then click Continue.
10. Complete the “Where is this Non-profit/tax exempt organization physically located?” page. You’ll need an address and telephone number. Use the contact information of the responsible party you’ve chosen unless the chapter has an official mailing address and/or telephone number established. The click “Continue”.
11. Complete the “Tell us about the Non-Profit/Tax Exempt Organization” page. The official name of your chapter should be used, such as “AORN of Denver” or “Northern Wisconsin AORN Chapter”. (Check with chapterservices@aorn.org for name approval in case of duplication.)
12. On the “Non-Profit/Tax Exempt Organization” page, the “Start Date” will be the month and year the chapter began operation. The IRS form will not permit you to enter a date in this field that is more than 25 years ago, so if your chapter is older than 25 years, type in a month and year that is less than 25 years in the past. Click “Continue” when you have completed this page.
13. You are now at the “Tell us more about the Non-Profit/Tax-Exempt Organization” page. Most chapters will click “No” to all questions on this page. Check “Continue”.
14. On the “What Does Your Business or Organization Do?” page, click the last option, “Other”. Then click “Continue”.

15. On the "You have chosen Other" page, click on "Other" and enter, "professional society" in the box. Then click "Continue".
16. Choose how you would like to receive your EIN confirmation letter; either on-line or by mail, by checking the appropriate box. Then click "Continue".
17. You are now at the "Summary of your information page". Review your information and if correct, print a copy of the summary page for your records and then click the "Submit" button at the bottom of the page.
18. If you chose to receive your confirmation letter online (preferred method), you will get it shortly after submitting the form. However, the IRS says that it may take up to two weeks for the chapter's EIN number to be active in their database system that the banks will use to confirm you have one. Therefore, you may need to wait a couple of weeks to open the bank account until your EIN appears in that database.