

SAN MATEO COUNTY OFFICE OF EDUCATION
CECC Financial System

How to Register for Taxpayer ID Number (TIN) Matching Services

The Internal Revenue Service (IRS) offers payers of income subject to backup withholding the ability to use the following services.

- Taxpayer Identification Number (TIN) Matching Application
- Interactive TIN Matching
- Bulk TIN Matching

These services allow you verify the accuracy of the taxpayer identification information supplied by a vendor. Using these services will lessen the likelihood of receiving backup withholding (CP2100) “B” notices and penalty notices from the IRS. If you are required to file Form 1099-MISC Information returns, you can take advantage of these services.



The following link provides information on how to register for these services:

<http://www.irs.gov/taxpros/article/0,,id=109646,00.html>

The following link provides an on-line tutorial on how to register for these services:

<https://la2.www4.irs.gov/PeopleBooks/CRMPROD/Training/3pdev/index.htm>



1. Register Individually for Access to IRS e-Services Products

Important things to know **before** you register:

Before you can register as a user, the following **personal** information is required:

- Name
- Social Security Number
- Date of Birth
- The Adjusted Gross Income from either of the last two years' tax return (1040, 1040A, etc.)
- Home Address

During the registration process, you will be asked to create the following:

- Username
- Password
- 5-digit numeric Personal Identification Number (PIN)
- A private, personal fact that you may use later to retrieve a forgotten Username.

If the name, SSN and adjusted gross income match IRS records, the Username will be successfully registered. Once you are registered as a user, you can then complete a TIN Matching Application.

2. Complete the Taxpayer ID Number (TIN) Matching Application

Before you can complete a new TIN Matching Application, you will need the following information:



- Your District's legal name, physical and mailing address, and phone number.
- Your District's Employer Identification Number (EIN).
- The physical address of all locations of your District which will be performing TIN Matching.
- The names, SSNs and phone numbers of the authorized users within your organization.
- The Personal Identification Number (PIN) you selected during the initial registration process.

As you complete the TIN Matching application, you may add the users to whom your District wishes to delegate authority. Any users you add will have to register individually as outlined in Step 1. Choose a role for each user from the following list:

- **Delegated User**
An individual in the District who has been authorized to perform TIN Matching.
- **Authorized Agent**
An individual in the District who has been authorized to perform TIN Matching on clients of the payer.
- **Responsible Official**
Someone designated by a Principal to perform all the TIN Matching duties of a Principal, including modifying a TIN Matching application.
- **Principal**
A District administrator such as the Chief Business Official. Principals are the individuals within the District held legally responsible by the IRS for the activities of the District.

Once the TIN Matching Application is approved, all users added who have confirmed their e-services registration using a confirmation code will be able to perform TIN Matching.



Be Careful

TIN Matching Application will not allow you to delete the **sole Principal** on an application, or to delete the **sole Responsible Official** for a Location on an application.

To delete a sole Principal or Responsible Official, add a new user, then delete the previous user.

The registration process is not yet complete. A confirmation code is being generated and will be mailed to you. After your information is entered on the Registration page and you submit the information, you

will receive a confirmation code in the mail from the IRS within fourteen days. This code confirms your username and password and finalizes your access to the e-services products.

	Be Careful It is important that you confirm registration in the system before your registration expires.
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After 28 days, if you have not confirmed your registration your password will expire. You must then use the **Forgotten Password or PIN** option to set a new password (which will also generate a new confirmation code).

To confirm registration once the code has arrived, select the **Confirm Registration** link at the Registration main page.

3. Questions or Need Assistance?

Call 650-802-5678 or submit a Help Desk Ticket to help@smcoe.k12.ca.us for questions or assistance with this documentation.