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Form 4506 series to end third-party mailing of tax returns and transcripts ...

Jun. 05, 2019

Internal Revenue Service
United States Department of the Treasury

This Product Contains Sensitive Taxpayer Data

Tax Return Transcript

Request Date:	11-01-2012
Response Date:	11-01-2012
Tracking Number:	12345678910

SSN Provided: 000-00-0000
Tax Period Ending: Dec. 31, 2010

The following items reflect the amount as shown on the return (PR), and the amount as adjusted (PC), if applicable. They do not show subsequent activity on the account.

SSN: 000-00-0000
SPOUSE SSN:
NAME(S) SHOWN ON RETURN: JOHN Q TAXPAYER
ADDRESS: PO BOX 101
ANYTOWN, ST 00000-0000-000

FILING STATUS: Single
FORM NUMBER: 1040
CYCLE POSTED: 20111201
RECEIVED DATE: Apr. 15, 2011

As part of its ongoing efforts to protect taxpayers from identity thieves, the Internal Revenue Service will stop its tax transcript faxing service in June and will amend the Form 4506 series to end third-party mailing of tax returns and transcripts in July.

Tax transcripts are summaries of tax return information. Transcripts have become increasingly vulnerable as criminals impersonate taxpayers or authorized third

parties. Identity thieves use tax transcripts to file fraudulent returns for refunds that

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Faxing service ends June 28

Starting June 28, 2019, the IRS will stop faxing tax transcripts to both taxpayers and third parties, including tax professionals. This action affects individual and business transcripts.

Individual taxpayers have several options to obtain a tax transcript. They may:

- Use IRS.gov or the IRS2Go app to access [Get Transcript Online](#); after verifying their identities, taxpayers may immediately download or print their transcript, or
- Use IRS.gov or the IRS2Go app to access [Get Transcript by Mail](#); transcript will be delivered within 10 days to the address of record, or
- Call 800-908-9946 for an automated Get Transcript by Mail feature, or
- Submit Form 4506-T or 4506T-EZ to have a transcript mailed to the address of record. Tax professionals also have several options to obtain tax transcripts necessary for tax preparation or representation as follows:
 - Request that the IRS mail a transcript to the taxpayer's address of record, or
 - Use e-Services' Transcript Delivery System online to obtain masked individual transcripts and business transcripts, or
 - Obtain a masked individual transcript or a business transcript by calling the IRS, faxing authorization to the IRS assistor and the IRS assistor will place the document in the tax practitioner's e-Services secure mailbox.
- When needed for tax preparation purposes, tax practitioners may:
 - Obtain an unmasked wage and income transcript by calling the IRS, faxing authorization to the IRS assistor and the IRS assistor will place the document in the tax practitioner's e-Services secure mailbox, or
 - Obtain an unmasked wage and income transcript if authorization is already on file by using e-Service's Transcript Delivery System.

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Retrieval Tool through the Free Application for Federal Student Aid (FAFSA) process.

Third parties who use these forms for income verification have other alternatives. The IRS offers an [Income Verification Express Service](#) (IVES) which has several hundred participants, who, with proper authorization, order transcripts. Lenders or higher education institutions can either contract with existing IVES participants or become IVES participants themselves. The tax transcript is an official IRS record. Taxpayers may choose to provide transcripts to requestors instead of authorizing the third party to request these transcripts from the IRS on their behalf.

Tax professionals who are attorneys, Certified Public Accountants or Enrolled Agents (i.e., Circular 230 practitioners) and do not have an [e-Services account](#) may create one and, with proper authorization from clients, can access the e-Services' Transcript Delivery System. Unenrolled tax practitioners must have an e-File application on file and be listed as delegated users to access TDS.

Customer File Number helps match transcripts

Because the taxpayer's name and Social Security number are now partially masked, the IRS also created a Customer File Number space that can be used to help third parties match transcripts to taxpayers. Third parties can assign a Customer File Number, such as a loan application number or a student identification number. The number will populate on the transcript and help match it to the client/student.

Learn more about the Customer File Number at [About the New Tax Transcript and the Customer File Number](#).

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