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EFIN documents from tax professionals.

**Jason Bramwell** • Feb. 08, 2024



The IRS and the agency's Security Summit partners alerted tax professionals on Thursday of a scam email impersonating various software companies in an attempt to steal electronic filing identification numbers (EFINs).

The IRS warned that scammers are posing as tax software providers and requesting EFIN documents from tax professionals under the guise of a required verification to



transmit tax returns. The scam artists attempt to steal client data and tax preparers’

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Danny Werfel

“With filing season underway, scammers use this time of year to target tax professionals as well as taxpayers in hopes of stealing information that can be used to try filing fraudulent tax returns,” IRS Commissioner Danny Werfel said in a statement. “The IRS and the Security Summit partners have noticed a new surge of an EFIN scam email that targets professionals. This scam serves as a powerful reminder that tax professionals should ensure strong security at their practices, including reminding employees to be careful with any emails coming in that could be posing as an official communication. A little extra caution can mean a world of difference for tax professionals during this busy period.”

The IRS said it has already received dozens of reports of the scam targeting tax professionals. They should be on alert for a scam email that includes a U.S.-based area code for faxing EFIN documents and also provides instructions on obtaining EFIN documentation from the IRS e-Services site if unavailable. Scam variations being seen use different fax numbers for software vendors. Other warning signs of the scam include inconsistencies in the email wording and a German footer in the email.

The IRS cautions tax professionals who receive these emails not to respond and not to proceed with any of the steps displayed in the email. The body of the fraudulent email states:

Dear [recipient\_email\_address],

Help us protect you.



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Summary from IRS e-Services, with a status of 'Completed', to Software B for verification.

To send us your EFIN Summary document:

1. Fax to Software B at 631-995-5984

PLEASE NOTE THAT YOUR PREPARER TAX IDENTIFICATION NUMBER (PTIN) APPLICATION CANNOT BE USED AS DOCUMENTATION FOR YOUR EFIN.

If you do not have the above documentation you can get a copy of your IRS Application Summary from IRS e-Services by following the below steps or call the IRS e-Services helpline at 866-255-0654.

1. Sign in to your IRS e-Services account
2. Choose your organization from the list provided and click Submit
3. Click the Application link to access your existing application
4. Click the e-File Application link
5. Select the existing application link that applies to your organization
6. Click the Application Summary link for the area of the application you wish to enter
7. Click the Print Summary link at the bottom of the summary presented on the screen

If you have any questions please contact the Compliance Department at xxx-xx-xxxx for assistance.



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limited; continuing education credits will not be offered:

- [Monday, Feb. 12, at 12 p.m. Eastern](#) | 11 a.m. Central | 10 a.m. Mountain & Arizona | 9 a.m. Pacific | 8 a.m. Alaska | 7 a.m. Hawaii-Aleutian.
- [Tuesday, Feb. 13, at 1 p.m. Eastern](#) | 12 p.m. Central | 11 a.m. Mountain & Arizona | 10 a.m. Pacific | 9 a.m. Alaska | 8 a.m. Hawaii-Aleutian.
- [Wednesday, Feb. 14, at 2 p.m. Eastern](#) | 1 p.m. Central | 12 p.m. Mountain & Arizona | 11 a.m. Pacific | 10 a.m. Alaska | 9 a.m. Hawaii-Aleutian.
- [Thursday, Feb. 15, at 3 p.m. Eastern](#) | 2 p.m. Central | 1 p.m. Mountain & Arizona | 12 p.m. Pacific | 11 a.m. Alaska | 10 a.m. Hawaii-Aleutian.
- [Friday, Feb. 16, at 3 p.m. Eastern](#) | 2 p.m. Central | 1 p.m. Mountain & Arizona | 12 p.m. Pacific | 11 a.m. Alaska | 10 a.m. Hawaii-Aleutian.

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