CPA Practice Advisor

practitioners obtain a client's tax transcripts.

Jason Bramwell • Apr. 09, 2024

In an email to tax professionals on April 5, the IRS said it’s making changes that will impact how practitioners obtain a client’s tax transcripts, as part of the agency’s efforts to combat identity theft and protect taxpayers’ personal information.

Starting April 8, tax professionals must now call the Practitioner Priority Service (PPS) to request transcripts to be deposited into their Secure Object Repository

(SOR). While PPS has been the primary avenue for these requests, other IRS toll-free

address of record, the IRS said. PPS assistors cannot resolve issues with ID.Me identity proofing or the status of an ID.Me account.

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