

## IRS Metro Minnesota Property Records Education Partners Presentation

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*41-03461*



## *Collection Process*

- IRS assess a liability
- Notice and demand for payment is sent
- If not paid in 10 days lien can be filed



## *Notice of Federal Tax Lien* *IRM 15.17.2*

- Secures the government's interest in the taxpayers assets.
- Filed with:  
Secretary of State  
and/or  
Country in which assets are located



## *Liens*

- Super priorities IRM 5.17.2.5.1
- Balance due on lien is most likely not the amount owed by the taxpayer.
- Balance of assessment.
- Redacted SSNs XXX-XX-1234



## *Liens*

- IRS releases liens within 30 days of payment
- Liens generally release automatically 10 years after assessment



## *Liens*

- If Taxpayer did not get copy of the release, or has questions, they can call the Cincinnati Campus at:

1(800) 913-6050





### *Centralized Liens*

- Cincinnati campus
- 18 page handbook "Guidelines for Notices of Federal tax Liens and Centralized Lien Processing."
- 2007 Updates and Reminders



### *Lien Processing*

- Toll-free number 1-800-913-4170
- Lien documents should not be returned to IRS unrecorded
- Ensure lien documents are recorded with or without original signatures
- Return copy designated IRS with appropriate recording data



### *Lien Processing*

- Submit monthly billing documents to the Lien Processing Unit
- Payment by EFT is strongly encouraged
- Contact Cincinnati IRS Campus Processing Unit relating to problems
- Notify Cincinnati 30 days before fee changes become effective



### *Lien Processing*

- Appendix A Recording Office Notification to the IRS
- Appendix B Substitute Recorder Invoice
- Additional Resources



### *Lien Pay-offs*

- Fax or mail 4506T and 8821 to Cincinnati Campus
- Fax: 1-859-669-3805
- Mail: Internal Revenue Service  
Lien Processing Unit  
P. O. Box 45595  
Stop 8420G  
Cincinnati, OH 45250-5595



### *Liens can be :*

- Filed
- Released
- Discharged
- Subordinated





## *Complex Lien Issues*

- Publication 4235
- MN, ND, SD worked in St. Paul
- St. Paul Contact Number  
(651)312-7978



## *Certificate of Discharge*

- Publication 783
- No standard form
- Removes the effect of the lien against a particular piece of property



## *Certificate of Subordination*

- Publication 784
- No standard form
- Lender requires priority over NFTL as a condition of the loan



## *Foreclosure*

- Special web section on [www.irs.gov](http://www.irs.gov)
- Explains taxability of forgiven indebtedness
- Worksheets and examples



## *Foreclosure Sale*

- Notify the IRS if NFTL filed
- Owner has 180 days to redeem
- IRS has right of redemption
- Does not release the lien





## Notice of Nonjudicial Foreclosure

- Send to:  
Collection Technical Services  
30 E 7<sup>th</sup> Street Suite 1222  
Stop 5900  
St. Paul, MN 55101



## Income Verification Express Service (IVES) --an e-service



## IVES features

Lenders can fax in 4506-T to the IRS, and get tax return transcripts sent to a secure mailbox within 2 business days

Speed up loan verification!

Company is billed once a month at \$4.50 per transcript request and pays via credit card or electronic funds transfer

Company can review & print reports on transcript requests



## Step one - for company to register to use IVES

- Company faxes in Form 13803 to one of three IRS units listed on form
- Form 13803 can be downloaded from [www.irs.gov](http://www.irs.gov)



STEP ONE

Form 13803 September 2006			Department of the Treasury—Internal Revenue Service Income Verification Express Service (IVES) Application		OMB Number 1545-2032
Please check the box(es) below that apply to this application.					
<input checked="" type="checkbox"/> New <input type="checkbox"/> Revised <input type="checkbox"/> Add New Location					
<b>Official Business Name (required)</b> (Remains the same when adding new locations.) <b>Fidelity Fiduciary Bank of Poppins, MN</b>		<b>Doing Business As (required)</b> (Remains the same when adding new locations.) <b>Fidelity Fiduciary Bank of Poppins</b>		<b>Business EIN/SSN (required)</b> (If your firm is a partnership, corporation or sole proprietorship with employees, provide the employee identification number. If you do not have employees, provide your social security number. (Remains the same when adding new locations).) <b>41-1234567</b>	
<b>Business Location Address (required)</b> A new application should be prepared for each business location. A Post Office Box will not be accepted. <b>17 Cherry Tree Lane, London MN 55000</b>		<b>Billing Address (required, if different than above)</b>		<b>Fax (required)</b> <b>651-555-2222</b>	
<b>Business Telephone Number (required)</b> <b>651-555-1111</b>		<b>Business E-mail address</b> <b>George.Banks@FFB.com</b>		<b>DUN and Bradstreet Number (optional)</b>	

Principal of Your Firm (required) A principal is an officer, owner, business manager or other person whose responsibility is to administer your company's participation in the IVES program.		
<b>Last name (required)</b> <b>Banks</b>	<b>First Name (required)</b> <b>George</b>	<b>MI</b> <b>A.</b>
<b>SSN (required)</b> <b>123-45-6789</b>	<b>Date of Birth (required)</b> <b>9-19-1880</b>	
<b>Primary Contact Name (if different than the principal). A contact must be available on a day to day basis to answer IRS questions during testing and throughout the processing year.</b>		
<b>Last name</b>	<b>First Name</b>	<b>MI</b>
<b>Telephone Number</b>	<b>E-mail address</b>	
<b>Responsible Official</b> The Responsible Official is an individual with responsibility for the operation and IVES users at the business location listed above. A principal listed above may also be a responsible official.		
<b>Last name (required)</b> <b>Banks</b>	<b>First Name (required)</b> <b>Winifred</b>	<b>MI</b> <b>A.</b>
<b>SSN (required)</b> <b>234-56-7890</b>	<b>Date of Birth (required)</b> <b>9-19-1885</b>	
<b>Applicant Agreement</b> The information I have provided on this application is true and correct to the best of my knowledge. I have read the Internal Revenue Service rules and procedures for participating in the Income Verification Express Service program and I agree to abide by them and to pay resulting fees timely. I understand that failure to do so will result in a temporary or permanent exclusion from the program.		



## Step Two

- Principal and **all users** register individually for e-services at [www.irs.gov](http://www.irs.gov)
- In this process, each user selects a username, password, and PIN. They also need their Adjusted Gross Income from recent Form 1040 return; e-mail address recommended
- IRS creates a "Secure Object Repository" for each registrant
- IRS mails a notice to each registrant with a confirmation number



[www.irs.gov](http://www.irs.gov) 7

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Individuals | Businesses | Charities & Non-Profits | Government Entities | Tax Professionals | Retirement Plans Community | Tax Exempt Bond Community

**Most Requested Forms and Publications**

- Form W-4
- Form 990
- Form 1040
- Form 991
- Form 4588

**Warning on Scam E-Mails**  
Members of the public are receiving phony e-mails falsely claiming to come from the IRS. A new scam surfaced on Friday, Aug. 24.

**Telephone Excise Tax Refund**  
Don't lose out. You still have time to request this refund.

**New Life Cycle Tools Help Exempt Organizations**  
The Web-based tools help guide exempt organizations through tax rules and requirements.

**Tax Payment Options**  
Weren't able to pay all of your taxes due by the deadline? Consider these options available to you.

**Information About**

- **Newsroom**
- **Conflicting Opportunities**
- **Tax Stats**
- **Frequently Asked Questions**
- **Taxpayer Advocate**

**Electronic Filing**  
File, Pay, and More.

## Tax Professional Page

**IRS Resources**

- Compliance & Enforcement
- Contact My Local Office
- eFile
- Forms and Publications
- Frequently Asked Questions
- News
- Taxpayer Advocate
- Where To File

**2008 IRS Nationwide Tax Forum Dates and Locations**  
Learn about the most recent IRS e-services products and the latest word from the IRS leadership and experts in the fields of tax law, compliance and ethics. Mark Your Calendars Now!

**IRS Seeks Comments on Tax Preparer Estimates**  
This IRS is inviting comment on whether the collection of information is necessary regarding Taxpayer Burden and the Paperwork Reduction Act. The comment period ends on October 30, 2007.

**New IRS e-file Rule July 30, 2007**  
New IRS e-file rules as of July 30, 2007 for Authorized IRS e-file Providers that obtain taxpayer information via the Internet directly or through third parties to e-file returns.

**IRSAC and RPAAC General Information**  
General information on the Internal Revenue Service Advisory Council and the Information Reporting Program Advisory Committee.

**e-services - Online Tools for Tax Professionals**  
Tax professionals and payers can now use the e-services suite of web-based products to do business with the IRS electronically. These services are available 24 hours a day, 7 days a week from just about any computer with an Internet connection. New products are now available, including the on-line e-file application.

**IRS Hotlines and Toll-Free Numbers**  
A consolidated list of frequently requested phone numbers and hours of operation including Practitioner Priority Service, IRS Tax Help Line for Individuals, Business and Specialty Tax Help and e-Help (Practitioners Only).

**Disaster Relief Resource Center for Tax Professionals**  
As a result of recent natural disasters many payroll and practitioner businesses have suffered significant losses from the devastation. The IRS and many of our national partners have put together this resource center for the impacted payroll and practitioner community, to provide assistance in reestablishing their businesses.

**The Tax Gap**  
This page provides information on the tax gap and efforts to reduce it as outlined in news releases, statistics and technical fact sheets.

**News from RAE - IRS online e-services available to Reporting Agents**  
Beginning June 2007, Reporting Agents, who are accepted participants in IRS e-file, will be provided access to RAE and e-file products tailored to meet their reporting needs.

## e-services - Online Tools for Tax Professionals

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**Already Registered? [Login](#) Not Yet Registered or Confirmed? [Registration Services](#)**

e-services is a suite of web-based products that will allow tax professionals and payers to conduct business with the IRS electronically. These services are available 24 hours a day, 7 days a week from just about any computer with an Internet connection.

e-services is not available to the general public. Only approved IRS business partners, such as e-filing tax professionals and payers, are eligible to participate in e-services.

All tax professionals are encouraged to register for e-services. We offer:

- Registration
- Preparer Tax Identification Number (PTIN) Application
- Online e-file Application

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**e-services** **On-line Tutorials** **Help** **Mailbox**

**Registration Services**

**Welcome to Registration Services**

**services**

- Registration
- Confirm Registration
- Revoke Registration
- Change Password/PIN
- Forgot, Forgotten or Lost Password or PIN

**Registration**

Here you can register to become a user of the Internal Revenue Service's (IRS) e-services web site. Our registration process involves collecting personal and taxpayer data for the sole purpose of authenticating your identity. The IRS will compare the information you provide with the information received from the Social Security Administration (SSA) and with the tax return information you previously filed. We will issue a registration confirmation code to you via the U.S. Postal Service, if the information you provide matches our data. You must log back into the e-services web site within 28 days of your registration submission and enter this confirmation code to complete the registration process.

We ask you to provide the following information to become a registered user:

- Legal name (verified with IRS & SSA records)
- Social Security Number (verified with SSA records)
- Date of birth (verified with SSA records)
- Telephone number
- E-mail address
- Adjusted Gross Income (AGI) from either your current year or prior year filed tax return (verified from IRS records)
- Username: Select your preferred username. Please read the rules for selecting your username
- Password and PIN: Select your password and PIN. Please read the helpful hints on selecting a secure, unique password and PIN.
- Reminder question to recover a forgotten username
- Home mailing address (verified from IRS records). If you have moved since you last transacted with the IRS, please update your information when registering.

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DATE: 05/11/2004  
CONFIRMATION CODE: 327572-G1HJ44

Department of the Treasury  
Internal Revenue Service  
Brookhaven Service Center

**George Banks**  
17 Cherry Tree Lane  
London, MN 55000

**Welcome To e-services!**

Thank you for your interest in the IRS e-services program. We received the initial registration information and successfully processed it. To complete your registration and using e-services, you must login to the e-services web site within 28 days of the date of this notice. The address is [www.irs.gov/efile](http://www.irs.gov/efile). Then click on e-services.

You will need the username and password you selected during the registration process, along with the confirmation code shown on the upper right corner of this notice, to complete the confirmation process. If you have forgotten your username, contact the help desk at 1-866-255-0654.

It is important to complete this confirmation process within 28 days of the date of this notice. If you don't, your account will be deactivated and you will need to repeat the entire registration process.

Please keep this letter for your records and again welcome to e-services.

Sincerely,  
Director  
Electronic Tax Administration  
Wage and Investment Division  
Letter 3563 (GG) (05-2002)

**When you receive the letter confirming your registration, here's where you will find your confirmation code.**



## After confirmation received in mail

- With confirmation letter, registrant logs in to e-services to complete registration
- Principal can now add or delete responsible officials, and add or delete delegated users
- Responsible Officials can add or delete delegated users.



## Company Principal -- authorizing users



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**Login**

Username

Password

[Not registered? Register here](#)

**FORGOT YOUR PASSWORD?**  
If you have forgotten your password, or your password is not working for some reason, [click here](#) to get a new one. You will need your username, name, SSN, date of birth, and shared secrets used in the original registration.

**WARNING!** You are using an Official United States Government System, which may be used only for authorized purposes. Unauthorized modification of any information stored on this system may result in criminal prosecution. The Government may monitor and audit the usage of this system, and all persons are hereby notified that the use of this system constitutes consent to such monitoring and auditing. Unauthorized attempts to obtain information and/or change information on these web sites are strictly prohibited and are subject to prosecution under the Computer Fraud and Abuse Act of 1986 and Title 18 U.S.C. Sec. 1001 and 1002.

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**Select Organization**

Select the organization you will represent in this session:

Each item below represents an organization for which you are authorized to perform work. By selecting an organization, you are logging in as an authorized user of that organization. You will be able to perform work for only that organization.

**Individual** (You may only have one business to select here)

- BLANCA ANNIELLE, 399 ELMHURST ST, SAN DIEGO, CA, 07260
- OLBRICHT GROUP LLC, 8 MARY E CLARK DR, HAMPSHIRE, NH, 03841
- MARYLAND INC., 1234 Main St., Kent, WA, 34567
- GREEN FLOWERS, 1130 MOUNTAIN AVE, ANITA, PA, 15711
- RUTILLO POMPOM, 175 LOYOLA TWIN PL, WOODLAND, CA, 07330
- CHRISTEL CORP, 81 NIFTY AVE, VANCOUVER, WA, 06370

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**services**

[Application](#)  
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**e-File Application**  
The Application to participate in the IRS e-file Program can be submitted on-line. The IRS will review your application information and supply a written confirmation as to your acceptance or rejection into the program. You may use this either to create a new Application or to revise an existing one.

**New TIN Matching Application**  
Players may apply for Taxpayer Identification Number (TIN) Matching, an on-line product which allows you to submit TIN/Name combinations for verification against IRS records.

**TIN Matching Application**  
You may revise your existing application by updating the associated location(s) and/or authorized user(s) information.

**IVES Consolidator Application**  
This application provides access to IVEIS participants to delegate user to participate the user fee services in the Transcript Delivery System (TDS) and the Integrated Financial System (IFS).

**TDS Dept of Education App**  
As a Principal, you are responsible for maintaining your department's TDS Application. After logging in to e-services, you will be able to perform the following TDS Application functions on behalf of your department: add authorized TDS delegate users, and delete authorized TDS delegate users.

When new users are added to your department's TDS application, they will be granted access to TDS after their registration information is matched with the identifying information you provided in the TDS Application. As you update your TDS application, your changes will take effect immediately. New TDS users can register with e-services at any time, they don't have to wait for you to add them to your TDS Application.

**IVES Consolidator Application: Main**

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Name: IVEIS TANS ARE US X5 Taxpayer ID: 02-515640

You are about to revise the application for your Firm/Organization.

Select the area of the application you want to enter, revise or view information about:

- [Firm/Organization Information](#)
- [Firm/Organization Address](#)
- [Principal Information](#)
- [Business Point of Contact](#)
- [Establish Location\(s\)](#)
- [Authorized User\(s\)](#)

**When you have finished Main page, you may:**

- Select **Next** to go to the Firm/Organization Information page.
- Select **Cancel** to exit the application and return to application menu page.



**IVES Consolidator Application: Authorized User(s)** 18

Name: IVES TANS ARE US IRS Taxpayer ID:

Please enter the person(s) that you wish to give access to or represent your firm for participation in the IVES Consolidator program. For determining a "Role" for the user you are entering, please select help for more information.

You can select any of the following actions from the table below:

- Select [Add](#) to add an authorized user. The editable entries will appear in the section.
- Select [Delete](#) to delete an authorized user.

Location	Name	TIN	Role	Title	Phone	Fax	Email	Selectable Authority	Start Date	End
1 TRAND 0000 LOC #2 FOOT,BOB	002-20-0007	002-20-0007	Responsible Official	TEST X	301429-7522		yu-fan.lee@irs.gov		09/05/2008	<a href="#">Edit</a> <a href="#">Delete</a>

**Authorized user**

First Name (Required): Kim  
 Middle Initial:   
 Last Name (Required): Brooks  
 Name Suffix:   
 Title:   
 SSN (Required): 001-01-6305  
 Date of Birth (Required): 07/04/1976   
 Phone (Required): 410/326-9654  
 Email:   
 Fax Number:   
 Role (Required): Delegated User  
 Location (Required): IVES TANS ARE US

Please select [Validate](#) after providing the indicated information above.

[Validate](#)

**Authorized user** 19

First Name (Required): Kim  
 Middle Initial:   
 Last Name (Required): Brooks  
 Name Suffix:   
 Title:   
 SSN (Required): 001-01-6305  
 Date of Birth (Required): 07/04/1976   
 Phone (Required): 410/326-9654  
 Email:   
 Fax Number:   
 Role (Required): Delegated User  
 Location (Required): IVES TANS ARE US

Please select [Validate](#) after providing the indicated information above.

[Validate](#)

Please select [Validate](#) after providing the indicated information above. 20

[Validate](#)

**Home Address**

The home address of record on file with the IRS is as follows.

Country: United States  
 Address 1: 3308 DERBYSHIRE  
 Address 2:  
 Address 3:  
 City: LAKELAND  
 State: Florida  
 Postal: 33170-0000

- Select [Add](#) to add an authorized user.
- Select [Clear](#) to clear the form.

[Add](#) [Clear](#)

[Return to IVES Consolidator Application: Main](#)

**When you have finished Authorized User(s), you may do any of the following:**

- Select [Previous](#) to go back to the Main page.
- Select [Save](#) to save all changes made.

**IVES reports available only to principals of the company**

*Note: Company is billed for all 4506-T requests, even if erroneous or request is unfillable.*

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[Electronic Account Resolution](#)  
[EAR Reports](#)  
[Reporting Agent e-services](#)  
[Transcript Delivery System](#)  
[Registration Services](#)

**Welcome to IRS e-services**

**BOB FOOT**  
 Representing INDIAN IVES

**Application**  
 Access to apply or revise an existing application on-line for participation in IRS e-file Program, Preparer Tax Identification Number (PTIN) or Taxpayer Identification Number (TIN) Matching.

**Electronic Account Resolution**  
 Allows authorized and authenticated practitioners the capability to submit inquiries regarding issues related to individual or business taxpayer accounts. There are five common inquiries: Account Problems Inquiry, Complex Refund Inquiry, Notice Inquiry, Installment Agreement Inquiry, and Payment Tracer Inquiry. In addition, Follow-up Inquiry allows practitioners to submit additional information on a previously submitted inquiry, and Multiple Inquiries allow practitioners to submit at least two of the five common inquiries for the same taxpayer.

**EAR Reports**  
**Reporting Agent e-services**  
 Provides access to Transcript Delivery System and Electronic Account Resolution.

**Transcript Delivery System**  
 Transcript Delivery System (TDS) provides self-service for return and account information requests by external customers through e-services portal. TDS automates the validation, processing, and delivery of taxpayer information to the authorized third party user, thus requiring less intervention from IRS personnel.

**Registration Services**  
 Registration Services allows you to confirm your registration, revise your registration information, change your password or PIN and recover a lost password or PIN.

**Secure Object Repository** 23

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**services**

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[IVES Detail Report](#)  
[IVES Summary Report](#)



Run Ivesdlt Irs 24

Run Control ID: MyIvesDlt

Report Manager Process Monitor Run

From Date:  Thru Date:

September 2006

These links are restricted for IVES users.

Save Add Update/Display

IRS

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IRS Home > Inbox

Inbox

Check for new mail (last checked: Fri Sep 22 10:21:59 EDT 2006)

Number of messages: 5

Click the column header to sort the column

Date	Subject	Status	Action
22-SEP-2006	IVES Summary Report	U	<a href="#">Read / View Info</a>
22-SEP-2006	IVES Detail Report	U	<a href="#">Read / View Info</a>
22-SEP-2006	IVES Detail Report	U	<a href="#">Read / View Info</a>
22-SEP-2006	IVES Detail Report	R	<a href="#">Read / View Info</a>
22-SEP-2006	IVES Detail Report	U	<a href="#">Read / View Info</a>

11/07/2006

Transcript Delivery System

Summary Report For IVES Consolidators

From History Transactions Logged: 11/01/2006 - 11/30/2006

Consolidator Number	Business Name	App Status	Billing Period	Total Requests	Delivered To
				Total TOS	
				Billed	Manual Disputed SOR Fax Portal
0000300002	RING ROAD VESLEY	On	09/01/2006 - 09/30/2006	14	5 9 0 1 0 0
0000300003	RAMES HICKER	On	01/01/2006 - 01/31/2006	5	0 5 1 0 0 0
0000300003	RAMES HICKER	On	09/01/2006 - 09/30/2006	1	0 1 0 0 0 0
0000300004	TESTING R US	On	09/01/2006 - 09/30/2006	8	8 0 0 8 0 0
0000300005	SCHEERAN COOKING	On	07/01/2006 - 07/31/2006	8	0 8 0 0 0 0
0000300005	SCHEERAN COOKING	On	08/01/2006 - 08/31/2006	1	0 1 0 0 0 0
0000300005	SCHEERAN COOKING	On	09/01/2006 - 09/30/2006	11	9 2 0 8 0 0
0000300006	INDIAN CUISINE	Off	No Activity for Requested Reporting Period		
0000300007	VALENTIA GROWING	On	No Activity for Requested Reporting Period		
0000300010	CRUNCH TY COOKIES	On	No Activity for Requested Reporting Period		
0000300011	ELEPHANTS BARCARE	On	No Activity for Requested Reporting Period		
0000300017	GREGORYS BIRD CHEST	On	09/01/2006 - 09/30/2006	1	1 0 0 1 0 0
0000300017	GREGORYS BIRD CHEST	On	11/01/2006 - 11/30/2006	1	0 1 0 0 0 0
0000300031	KUMBLAY BIRD CHESTS	On	No Activity for Requested Reporting Period		
0000300040	REACING DEVELOPERS INC	On	08/01/2006 - 08/31/2006	8	0 8 0 0 0 0
0000300061	PAT IDENTITY	On	No Activity for Requested Reporting Period		
0000300065	EMPLOYEE MUTUAL BENEFIT ASSOCIATION	On	No Activity for Requested Reporting Period		
300001	BALANCE PERFECTORS INC	On	08/01/2006 - 08/30/2006	2	0 2 1 0 0 0
300001	BALANCE PERFECTORS INC	On	07/01/2006 - 07/31/2006	5	0 5 7 0 0 0
300001	BALANCE PERFECTORS INC	On	08/01/2006 - 08/31/2006	38	0 48 36 2 0
300001	BALANCE PERFECTORS INC	On	09/01/2006 - 09/30/2006	22	10 70 12 0 0
300001	BALANCE PERFECTORS INC	On	11/01/2006 - 11/30/2006	2	0 2 0 0 0 0
Total IVES Consolidators =				14	
Total IVES Consolidators On =				13	
Total IVES Consolidators Off =				1	
Grand Total Requests for Report Period =				127	



https://www.pay.gov/paygov/ 26

What is Pay.gov?

Pay.gov can be used to make secure electronic payments to Federal Government Agencies. Payments can be made directly from your bank account or by credit/debit card.

How Do I Make a Payment?

Find the Agency Form you need to fill out. Complete the required information and submit the Form. Enter payment information and Submit your payment.

What Federal Agencies Can I Pay?

Agency List

Should I Register?

Will you use Pay.gov often?  
Do you want to save your Profile?  
Do you track your payments or set up recurring payments?  
[Click here to Register](#)

Information for Government Agencies

Frequently Used Forms

SBA Payments

Borrower and Lender Payments

US Customs and Border Protection

Pay Excise Taxes, apply for CDSOA Distribution

US Courts

Pay a violation notice received on Federal property

Department of Justice

NCIF (CLASS) and DADG/DODS Accounts

All other Forms

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IRS



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**IRS Express**

Form Number: IRSEXP

User Fees for IRS

Internal Revenue Service < Department of the Treasury

<https://www.pay.gov/paygov/forms/formInstance.html?agencyFormId=10521385>

 IRS

<https://www.pay.gov/paygov/forms/formInstance.html?agencyFormId=10521385>

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**Internal Revenue Service**  
United States Department of the Treasury

**1. Enter Customer Name & Number**

Customer Name  
[Text Box]

Customer Number from Invoice  
[Text Box]

**2. Enter Contact Information**

Address 1  
[Text Box]

Address 2  
[Text Box]

City [Text Box] State [Dropdown] Zip [Text Box]

Point of Contact Name:  
[Text Box]

Point of Contact Phone Number:  
[Text Box]

Point of Contact Phone Number:  
[Text Box]

Point of Contact Email:  
[Text Box]

3. Enter Payment Information

Invoice Number	Payment Amount	Billing Period (from invoice)

Total Payment Amount:  
\$ [Text Box]


Payment Method: ☐ ACH ☐ Credit Card


☐ Check here if Name and Address information is the same as the Billing information.

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**To get a transcript  
-- for delegated users**


Users must first register for e-services, as explained in Step Two of this presentation.

 IRS



**To get a transcript**

- User secures Form 4506-T from borrower and faxes it to IRS
- Fax cover sheet required for each set of 50 Forms 4506-T
- If user has given us a regular e-mail address when registering, we will notify by e-mail when there is something in the SOR (allow 2 business days)
- Transcripts remain in SOR for 3 business days

 IRS

**Form 4506-T** Request for Transcript of Tax Return

(Rev. April 2006)  
Department of the Treasury  
Internal Revenue Service

▶ Do not sign this form unless all applicable lines have been completed. Read the instructions on page 2.  
▶ Request may be rejected if the form is incomplete, illegible, or any required line was blank at the time of signature.

**Loan # or order #**  
OMB No. 1545-1073

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Tip: Use Form 4506-T to order a transcript or other return information free of charge. See the product list below. You can also call 1-800-829-1040 to order a transcript. If you need a copy of your return, use Form 4506, Request for Copy of Tax Return. There is a fee to get a copy of your return.

1a Name shown on tax return. If a joint return, enter the name shown first. <b>John A. Borrower</b>	1b First social security number on tax return or employer identification number (see instructions) <b>678-90-1234</b>
2a If a joint return, enter spouse's name shown on tax return <b>Mary A. Borrower</b>	2b Second social security number if joint tax return <b>567 89 -1234</b>

3 Current name, address (including apt., room, or suite no.), city, state, and ZIP code  
**100 South Any Street, Anytown, MN 55000**

4 Previous address shown on the last return filed if different from line 3

5 If the transcript or tax information is to be mailed to a third party (such as a mortgage company), enter the third party's name, address, and telephone number. The IRS has no control over what the third party does with the tax information.  
**Fidelity Fiduciary Bank of Poppins Land, 17 Cherry Tree Lane, London, Maryland 20700  
Fax number 605-555-3333, user -ID for secure mailbox delivery**

Caution: If a third party requires you to complete Form 4506-T, do not sign Form 4506-T if lines 6 and 9 are blank.







*Questions?*  
Thank you!

