



TaxScripts
IRS Transcripts in Seconds



TAXSCRIPTS® TAXPRO CHECKLIST

___(A) IRS e-SERVICES Registration – Electronic Return Originators (must be a delegated user of firm)

Plus have an EFIN Number

You must be a ‘Delegated User’

- A Delegated User is an individual within a Firm/Organization, other than a Principal or Responsible Official, who is authorized to use one or more of the e-services’ (<http://www.irs.gov/taxpros/article/0,,id=109646,00.html>) products. A Delegated User should be an employee, partner, or other member of the Firm/Organization that is a Circular 230 professional (CPA, EA, JD).
- A Delegated User is appointed by the Principal or Responsible Official of a Firm/Organization. The individual appointed should have a business relationship with the Firm/Organization.

___(B) Centralized Authorization File (CAF) NUMBER

___(C) Signed Power of Atty (POA)/Form 2848 on file at office on customers you are pulling transcripts

___Customer Data that will serve as Electronic Signature (AGI, Yr of AGI, SSN, Self-Selected PIN)

___Welcome Letter from TaxScripts that provide key to access product

(A) WHAT DO I NEED TO USE TAXSCRIPTS® TaxPro?

Users need to be registered with **IRS e-Services** in order to use the product. TaxScripts is a frontend application to the IRS e-Services site, which allows faster responses to submitting form 2848 and downloading of IRS transcripts.

WHAT IS THE **IRS e-SERVICES** (<http://www.irs.gov/taxpros/article/0,,id=109646,00.html>) **SITE?**

e-Services is a suite of web-based products that will allow tax professionals and payers to conduct business with the IRS electronically. e-Services is not available to the general public. Only approved IRS business partners as noted below, are eligible to participate in e-Services.

WHAT TYPE OF **IRS e-SERVICES REGISTRATION DO I NEED?**

TaxScripts® TaxPro users should be **Electronic Return Originators (ERO)** who have e-filed five or more accepted returns are eligible to use these incentive products:

- Disclosure Authorization (DA)
- Electronic Account Resolution (EAR)
- Transcript Delivery System (TDS)

Note: Effective November 1, 2007, **all Circular 230 Practitioners** who qualify as Attorneys, Certified Public Accountants, or Enrolled Agents will have unlimited access to the incentive products listed above whether they e-file their client returns or not. Click here for **FAQs** (<http://www.irs.gov/taxpros/article/0,,id=174857,00.html>) and **instructions** (<http://www.irs.gov/taxpros/article/0,,id=174880,00.html>) on how to apply or for answers to frequently asked questions.

HOW DO I REGISTER?

The first step is registering for e-Services. Each user must register individually to create and have access to a secure mailbox. The registration process is a one-time automated process where the user selects a username, password and PIN that will be needed to log onto e-Services. After verifying the information provided, the IRS will mail a registration notice containing a confirmation number to the registrant's last known address of record. See the e-Services [registration](https://la.www4.irs.gov/e-services/Registration/index.htm) (<https://la.www4.irs.gov/e-services/Registration/index.htm>) page for more details.

The second step is to submit an online *e-file* application - **if the firm does not already have an efin number. If they file tax returns electronically they already have one.** Anyone who registers with e-Services can create a new or revised application. You must follow the specific [e-file application instructions](http://www.irs.gov/taxpros/article/0,,id=174880,00.html) (<http://www.irs.gov/taxpros/article/0,,id=174880,00.html>) created for the sole purpose of obtaining e-Services.

- **What should I do if I forgot or lost my password?**

If you forgot or lost your password, you must use the [Forgotten Password or PIN](https://la.www4.irs.gov/e-services/Registration/Reg_ForgotPwd/Reg_RecoverPwPINForm) (https://la.www4.irs.gov/e-services/Registration/Reg_ForgotPwd/Reg_RecoverPwPINForm) link on the login page. You will need your username, SSN, date of birth and shared secrets.

- **Who should I contact if I'm having difficulty accessing an e-Services application or if I need to report a problem?**

There are FAQs and on-line tutorials for all e-Services products. However, if you still need assistance after using the on-line resources, you can contact the **e-help Desk at 1-866-255-0654** (512-416-7750 for international calls).

(B) WHAT IS A CAF NUMBER? Users should have a Central Authorization File or CAF number. This is assigned to a tax practitioner when a Form 2848 is filed for power of attorney

- <http://www.irs.gov/businesses/small/article/0,,id=161253,00.html>

(C) DO I NEED TO SUBMIT A SIGNED POA TO USE TAXSCRIPTS?

For TaxScripts, you can submit a POA using an electronic signature.

The Signature Verification step in TaxScripts allows the user to enter specific data that will serve as the POA request's electronic signatures. The IRS e-services website requires these 'signatures' to verify the user's identity and that the tax client has granted the user authority to file this POA. The taxpayer data that would identify the user as a representative - is the AGI, Year of that AGI, DOB, and self-selected PIN (see below for more info). Practitioners should have a printed/signed version of the POA be on file at their office for auditing purposes.

FROM THE IRS:

- **Authorization to file Form 2848 electronically.** Your representative may be able to file Form 2848 with the IRS electronically. PIN number boxes have been added to the taxpayer's signature section. Entering a PIN number will give your representative authority to file your form electronically using the PIN number as the electronic signature. You can use any five digits other than all zeros as a PIN number. You may use the same PIN number that you used on other filings with the IRS.

The user of TaxScripts should be the individual on the POA.

WHO CAN I CALL IF THEY HAVE A QUESTION WITH TAXSCRIPTS?

- ProSystem (Pfx) Customers Support - 1-800-739-9998, Option 3, Option 2
- Research Customers Technical Support - 1-800-835-0105
- Research Customers Subscription Support - 1-800-344-3474

HOW CAN I GET MY ACCESS KEY/WELCOME LETTER RE-SENT?

Just access this site to input your email address - <http://www.taxscripts.com/cch/license/acctinfo.htm>