IRS TRANSCRIPTS
APRIL 2019
JENNIFER CABLE

TYPES OF TRANSCRIPTS

- Account Transcript
    - Most frequently used
    - Shows transactions (penalties, interest, filing status, tax assessments, etc..)
    - Shows when certain notices have been issued

- Tax Return Transcript
    - Copy of filed return
    - Can only obtain 3 previous years

TYPES OF TRANSCRIPTS

- Record of Account Transcripts
  - Combination of Account Transcripts and Tax Return Transcripts
  - Can only obtain 3 previous years

- Payoff Calculator
  - Basic page that shows all balances with payoff amount on two separate dates (also shows penalties and interest)

TYPES OF TRANSCRIPTS

- Tax Mod Print
  - Generally used to show the ASED, CSED, and RSED on tax years
  - Sometimes are hard to obtain
  - Sections of a Tax Mod
    - Transaction information
      - Breakdown of the return information
    - Notice Section
      - Detail of which notices have been issued
    - Case Control
      - Informs who and in what stage the case is in
    - Status History

TYPES OF TRANSCRIPTS

- Wage and Income Transcripts
  - Shows the client's wage/income for tax years
  - Used for:
    - Tax return preparation
    - Comparison with returns and Notice of Deficiency, Audits, and CP2000

FREQUENTLY USED COLLECTION STATUS CODES

Code	Explanation
06	Delinquent return not filed. Collection suspended while examination or until another tax period posts
12	Full Paid-generated in response and/or account is less than tolerance
21	Return filed and assessed, first notice issued
22	Return filed and assessed; TDA issued ACS, Queue, ICS or paper
24	Return filed and assessed; TD issued awaiting paper or ICS assignment, queue
53	Currently uncollectible
58	CP 504 notice issued
64	Defaulted Installment Agreements
72	Litigation/Suspend TDA

WALL & ASSOCIATES INC.

HOW DO I ORDER TRANSCRIPTS??

- Practitioner Priority Service (PPS)
  - Individual & Business – 866-860-4259
- Automated Collection Service (ACS)
  - Individual – 800-829-7650
  - Business – 800-829-3903
- Revenue Officer (RO)
- Appeals Officer (SO)
- Taxpayer Advocate Service (TAS)
- CAF Unit
- E-Services (you must register)