

The 4506-C must be filled out completely and must be legible and unaltered. The IRS will not accept any signs of alteration, whether whited out, crossed out, added, or written over, even if initialed. Verification of Non-Filing is not available.

FAQ

- What is the average turnaround time to receive transcripts back?
 - 5 business days. The IRS states that any order placed after 3pm Eastern will not be processed until the next day.
- Are handwritten forms accepted?
 - Handwritten forms are accepted but must be legible.
- Will the IRS speak with a third party?
 - The IRS will only ever speak with the consumer themselves. They will not speak with a third party for any reason.

Reasons you might get a “No Record of Return Filed”

- Not enough time has passed for the IRS to enter the transcripts into their TAX RETURN VERIFICATION system. Transcripts take between 4-8 weeks to get into the transcript system.
- The borrower filed their taxes late, and a regular 1040a was ordered. If they filed late, the only way to get results would be to order a Record of Account (Line 6C)
- For business transcripts, the wrong type was ordered (e.g., you need a 1065 and ordered an 1120), or the year ending date does not match the tax period.

Transcript availability per the IRS

When your original return shows a...	and you filed electronically, then	and you filed on paper, then
refund amount of no balance due,	allow 2-3 weeks after return submission before you request a transcript.	allow 6-8 weeks after you mailed your return before you request a transcript
balance due and you paid in full using your return,	allow 2-3 weeks after return submission before you request a transcript.	we process your return in June and you can request a transcript in mid to late June. Note: we process all payments upon receipt.
balance due and you paid in full after submitting the return,	allow 3-4 weeks after full payment before you request a transcript.	
balance due and you didn't pay in full,	we process your return in mid-May and you can request a transcript by late May.	

Tips for using the new 4506-C form to avoid IRS rejections:

- The IRS will only accept one taxpayer per 4506C form. Separate orders must be placed for co-borrowers
- There can only be one product per form allowed and it must match order exactly
- Two names can appear on the form for 1040 orders only, but the first taxpayer listed must match the order
- You are permitted to order 1040 Joint transcripts using a single consumer or primary borrower. There isn't a need for more than one consumer, it will be a joint tax return. This is common, especially in cases of death, divorce, etc. Sometimes you only have one consumer, and this will still return the joint result.
- If a 1040 order has 2 names both must sign and date the 4506-C
- Name and SSN must match the order exactly
- Years on the form must match the order exactly
- The new Form 4506-C cannot be edited. IVES Participants will need to ensure their customers fill out the form as they intend it to be processed. Lines 5 through 8 must be complete before the taxpayer signs. The exception to this is the following:
 - Line 5b, Customer File Number
 - Line 5c Unique Identifier (if included) days.

Form 4506-C (October 2022)		Department of the Treasury - Internal Revenue Service IVES Request for Transcript of Tax Return		OMB Number 1545-1872	
Do not sign this form unless all applicable lines have been completed. Request may be rejected if the form is incomplete or illegible. For more information about Form 4506-C, visit www.irs.gov/ind and search IVES.					
1a. Current name		2a. Spouse's current name (if joint return and transcripts are requested for both taxpayers)			
i. First name	ii. Middle initial	iii. Last name/BMF/company name	1. Spouse's first name	ii. Spouse's last name	
b. First taxpayer identification number (see instructions)		2b. Spouse's taxpayer identification number (if joint return and transcripts are requested for both taxpayers)			
1c. Previous name shown on the last return filed (if different from line 1a)		2c. Spouse's previous name shown on the last return filed (if different from line 2a)			
i. First name	ii. Middle initial	iii. Last name	1. First name	ii. Middle initial	iii. Last name
3. Current address (including apt., room, or suite no.), city, state, and ZIP code (see instructions)					
a. Street address (including apt., room, or suite no.)	b. City	c. State	d. ZIP code		
4. Previous address shown on the last return filed (if different from line 3 (see instructions))					
a. Street address (including apt., room, or suite no.)	b. City	c. State	d. ZIP code		
5a. IVES participant name, ID number, SOR mailbox ID, and address					
i. IVES participant name	ii. IVES participant ID number	iii. SOR mailbox ID			
w. Street address (including apt., room, or suite no.)					
v. City	vi. State	vii. ZIP code			
5b. Customer file number (if applicable) (see instructions)					
5c. Unique identifier (if applicable) (see instructions)					
3d. Client name, telephone number, and address (this field cannot be blank or not applicable (N/A))					
i. Client name					
iii. Street address (including apt., room, or suite no.)	iv. City	v. State	vi. ZIP code		
Caution: This tax transcript is being sent to the third party entered on Line 5a and/or 5d. Ensure that lines 5 through 8 are completed before signing. (see instructions)					
6. Transcript requested: Enter the tax form number here (1040, 1065, 1120, etc.) and check the appropriate box below. Enter only one tax form number per request for line 6 transcripts.					
a. Return Transcript <input type="checkbox"/>		b. Account Transcript <input type="checkbox"/>		c. Record of Account <input type="checkbox"/>	
7. Wage and Income transcript (W-2, 1099-G, etc.) <input type="checkbox"/>					
8. Enter a max of three form numbers here; if so entry is made, all forms will be sent.					
b. Mark the checkbox for taxpayer(s) requesting the wage and income transcripts. If no box is checked, transcripts will be provided for all listed taxpayers					
Line 1a		Line 2a			
8. Year or period requested. Enter the ending date of the tax year or period using the mm/dd/yyyy format (see instructions)					
Caution: Do not sign this form unless all applicable lines have been completed.					
Signature of taxpayer(s). I declare that I am either the taxpayer whose name is shown on line 1a or, if applicable, line 2a, or a person authorized to obtain the tax information requested. If the request applies to a joint return, at least one spouse must sign; however, if both spouses' names and TINs are listed in lines 1a and 2a-2c, both spouses must sign the request. If signed by a corporate officer, 1 person or more shareholder, partner, managing member, guardian, tax matters partner, executor, receiver, administrator, trustee, or party other than the taxpayer, identify that I have the authority to execute Form 4506-C on behalf of the taxpayer. Note: This form must be received by IRS within 120 days of the signature date.					
<input type="checkbox"/> Signatory attests that he/she has read the above attestation clause and upon so reading declares that he/she has the authority to sign the Form 4506-C. See instructions.					
Signature for Line 1a (see instructions)		Date	Phone number of taxpayer on line 1a or 2a		
<input type="checkbox"/> Form 4506-C was signed by an Authorized Representative Print/Type name		<input type="checkbox"/> Signatory confirms document was electronically signed			
Title (if line 1a above is a corporation, partnership, estate, or trust)					
Spouse's signature (required if listed on Line 2a)					
<input type="checkbox"/> Form 4506-C was signed by an Authorized Representative Print/Type name		Date			
<input type="checkbox"/> Signatory confirms document was electronically signed					

Instructions for Form 4506-C, IVES Request for Transcript of Tax Return	
Section references are to the Internal Revenue Code unless otherwise noted.	
Future Developments For the latest information about Form 4506-C and its instructions, go to www.irs.gov and search IVES. Information about any recent developments affecting Form 4506-C (such as legislation enacted after we released it) will be posted on that page. What's New: Form 4506-C includes the client company requesting transcripts and increased the number of Wage and Income transcripts requests.	
General Instructions Caution: Do not sign this form unless all applicable lines have been completed. Designated Recipient Notification: Section 6103(c) limits disclosure and use of return information received pursuant to the taxpayer's consent and holds the recipient subject to penalties for any unauthorized access, other use, or redisclosure without the taxpayer's express permission or request. Taxpayer Notification: Section 6103(c) limits disclosure and use of return information provided pursuant to your consent and holds the recipient subject to penalties, brought by private right of action, for any unauthorized access, other use, or redisclosure without your express permission or request. Purpose of form: Use Form 4506-C to request tax return information through an authorized IVES participant. You will designate an IVES participant to receive the information on line 5a. Note: If you are aware of which type of transcript you need, check with the party requesting your tax information. Where to file: The IVES participant will fax Form 4506-C with the approved IVES cover sheet to their assigned Service Center.	
Chart for ordering transcripts	
If you assigned Service Center:	For the requests with the approved cover sheet to:
Austin Submission Processing Center	Austin IVES Team 844-249-6238
Kansas City Submission Processing Center	Kansas City IVES Team 844-249-6238
Ogden Submission Processing Center	Ogden IVES Team 844-249-6238
Specific Instructions	
Line 1a/2a (if spouse is also requested): For IMF Requests: Enter the First, Middle Initial, and Last Name in the indicated fields. If all characters will not fit, please enter up to 12 for first name and 22 for last name. For BMF Requests: Enter the company name in the Last Name field. If all characters will not fit, please enter up to 22 characters.	
Line 1a/2b (if spouse is also requested): Enter the social security number (SSN) or individual taxpayer identification number (ITIN) for the individual listed on line 1a including the dashes in the correct format, or enter the employer identification number (EIN) for the business listed on line 1a including the dashes in the correct format. Line 1a/2c (if spouse is also requested): Enter your previous name as shown on your last filed tax return if different than line 1a.	
Line 2: Enter your current address in the indicated fields. If you use a P.O. Box, incident and the number in the Current Address field. Line 4: Enter the address shown on the last return filed if different from the address entered on line 2. Note: If the address on lines 3 and 4 are different and you have not changed your address with the IRS, the Form 8322, Change of Address, or Form 8322-B, Change of Address or Resigned Party—Business, with Form 4506-C.	
Line 5b: Enter up to 10 numeric characters to create a unique customer file number that will appear on the transcript. The customer file number cannot contain an SSN, ITIN or EIN. Completion of this line is not required. Line 5c: Enter up to 10 alpha-numeric characters to create a unique identifier that will show in the mallic file information. The unique identifier cannot contain an SSN, ITIN or EIN. Completion of this line is not required. Note: If you use an SSN, we will not report the information and the customer file number or unique identifier will reflect a generic entry of "999999999". Line 5d: Enter the Client company name, address, and phone number in the indicated fields. A Client company receives the requested tax transcripts from the IVES participant. If the IVES participant is also the Client company, the IVES participant information should be entered on Line 5a and 5d. These fields cannot be blank or Not Applicable (N/A). Line 6: Enter only one tax form number (1040, 1065, 1120, etc.) per request for line 6 transcripts request types. Line 6a: Return Transcript includes most of the line items of a tax return as filed with the IRS. A tax return transcript does not reflect changes made to the account after the return is processed. Transcripts are only available for the following returns: Form 1040 series, Form 1065, Form 1120, Form 1120-B, Form 1120-C, and Form 1120-ES. Return transcripts are available for the current year and returns processed during the prior 3 processing years. Line 6b: Account Transcript contains information on the financial status of the account, such as payments made on the account, penalty assessments, and adjustments made by you or the IRS after the return was filed. Return information is limited to items such as tax liability and estimated tax payments. Account transcripts are available for most returns. Line 6c: Record of Account provides the most detailed information as to a combination of the Return Transcript and the Account Transcript. Available for current year and 3 prior tax years. Line 7: The IRS can provide a transcript that includes data from these information returns: Form W-2, Form 1099 series, Form 1096 series, or Form 3498 series transcript. Enter up to three information return types. If no specific type is requested, all forms will be provided. State or local information is not included with the Form W-2 information. The IRS may be able to provide this transcript information for up to 10 years. Information for the current year is generally not available until the year after it is filed with the IRS. For example, Form W-2 information for 2018, filed in 2017, will likely not be available from the IRS until 2018. If you need Form W-2 information for retirement purposes, you should contact the Social Security Administration at 1-800-772-1213. Line 8: Enter the end date of the tax year or period requested in mm/dd/yyyy format. This may be a calendar year. Fiscal years are generally not available until the year after it is filed with the IRS. For example, Form W-2 information for 2018, filed in 2017, will likely not be available from the IRS until 2018. If you need Form W-2 information for retirement purposes, you should contact the Social Security Administration at 1-800-772-1213. CAUTION You must check the box on the signature area to acknowledge you have the authority to sign and request the information. The form is signed and requested information is available to the IRS. Signature and date: Form 4506-C must be signed and dated by the taxpayer listed on line 1a and, if listed, 2a. The IRS must receive Form 4506-C within 120 days of the date signed by the taxpayer or it will be rejected. Ensure that all applicable lines, including lines 5a through 8, are completed before signing. Authorized Representative: A representative can sign Form 4506-C for a taxpayer if the taxpayer has specifically designated this authority to the representative on Form 2848, Line 5a, and Form 2843 is attached to the Form 4506-C request. If you are heir or next of kin, or Beneficiary, you must be able to establish a material interest in the estate or trust. If Form 4506-C is signed by a representative, the Authorized Representative check box must be marked.	
Electronic Signature: IVES participants that opt in to the Electronic Signature program accept electronic signatures. Contact the IVES participant for approval and guidance for electronic signatures. If the Form 4506-C is signed electronically, the Electronic Signature check box must be marked. Individuals: Transcripts listed on line 6 may be furnished to either spouse if jointly filed. Signatures are required for all taxpayers listed on Line 1a and 2a. Corporations: Generally, Form 4506-C can be signed by: [1] an officer having legal authority to bind the corporation; [2] any person designated by the board of directors or other governing body; or [3] any officer or employee on either request by any principal officer and attested to by the secretary or other officer. A bona fide shareholder of record owning 1 percent or more of the outstanding stock of the corporation may submit a Form 4506-C, but must provide documentation to support the requester's right to receive the information. Partnerships: Generally, Form 4506-C can be signed by any person who was a member of the partnership during any part of the tax period requested on line 8. All others: See section 6103(e) if the taxpayer has died, is insolvent, is a dissolved corporation, or if a trustee, guardian, executor, receiver, or administrator is acting for the taxpayer. Documentation: For entities other than individuals, you must attach the authorization document. For example, this could be the letter from the principal officer authorizing an employee of the corporation or the letters testamentary authoring an individual to act for or estate, executor, receiver, or administrator. Privacy Act and Paperwork Reduction Act Notice: We ask for the information on this form to establish your right to gain access to the requested tax information under the Internal Revenue Code. We need this information to properly identify the tax information and respond to your request. You are not required to request any transcript if you do not request a transcript, sections 6103 and 6109 and their regulations require you to provide this information. We may not be able to process your request. Providing false or fraudulent information may subject you to penalties. Routine uses of this information including giving it to the Department of Justice for civil and criminal litigation, and other states, the District of Columbia, and U.S. commonwealths and possessions for use in administering their tax laws. We may also disclose this information to other countries under a tax treaty, to federal and state courts, to enforce federal nontax criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism. You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or forms relating to a form or its instructions must be retained as long as their contents may become relevant to the administration of internal Revenue law. Generally, tax returns and return information are confidential, as required by section 6103. The time needed to complete and file Form 4506-C will vary depending on individual circumstances. The estimated average time is: Learning about the law or the form 10 min. Preparing the form 12 min. Copying, assembling, and sending the form to the IRS 20 min. If you have comments concerning the accuracy of these time estimates or suggestions for making Form 4506-C simpler, we would be happy to hear from you. You can write to: Internal Revenue Service Tax Forms and Publications Division 1111 Constitution Ave. NW, IRB-0228 Washington, DC 20224 Do not send the form to this address. Instead, see Where to file on this page.	

The following will show how all legacy divisions need to be displayed for line 5A:

For Avantus-Xactus360

i. IVES participant name	Avantus
ii. IVES participant ID number	0000301645
iii. SOR mailbox ID	NGWLEJUO2Q
iv. Street address (including apt., room, or suite no.)	600 Saw Mill Rd
v. City	West Haven
vi. State	CT
vii. ZIP code	06516

For CIS

i. IVES participant name	Universal Credit Services
ii. IVES participant ID number	301241
iii. SOR mailbox ID	NCOADMIN1
iv. Street address (including apt., room, or suite no.)	370 Reed RD
v. City	Broomall
vi. State	PA
vii. ZIP code	19008

For Credit Plus Inc.

i. IVES participant name	Credit Plus Inc.
ii. IVES participant ID number	0000301670
iii. SOR mailbox ID	Utah21804
iv. Street address (including apt., room, or suite no.)	31550 Winterplace Pkwy
v. City	Salisbury
vi. State	MD
vii. ZIP code	21804

For DataFacts Lending

i. IVES participant name	UniversalCISMavery23
ii. IVES participant ID number	301241
iii. SOR Mailbox ID	Mavery23
iv. Street address (including apt., room, or suite no.)	370 Reed RD
v. City	Broomall
vi. State	PA
vii. ZIP code	19008

For Universal Credit

i. IVES participant name	Universal Credit Services
ii. IVES participant ID number	301241
iii. SOR Mailbox ID	NCOADMIN1
iv. Street address (including apt., room, or suite no.)	370 Reed RD
v. City	Broomall
vi. State	PA
vii. ZIP code	19008

If needed, below are the form formatting details:

Form Coordinates:

Will use X x Y to list the coordinates of the object on the page. All coordinates are pulled from the top left corner of the field/check box.

X = left to right direction.

Y = top to bottom direction.

Form Sizes:

Page Size: 8.5" x 11".

Form Area: 7.9in x 10.55in.

Instruction Area: 7.9in x 10.2in.

Instruction Column Area: 2.5in x 9.85in with a 0.2in gutter between columns

Page Margins:

Left, Right, Top Margins: 0.3in.

Bottom Margin: 0.5in (from page edge to bottom border line).

Field Margins:

0.05in from a line or check box

Form Fonts:

Captions (C), the visual text of the form, Arial, 7 point, unless specified below (use of bold and italic as indicated on form).

Values (V), the fillable field, Arial, 12 point.

Form Header Fonts:

Form - Arial, 10 point, Centered aligned.

4506-C - Arial, Bold, 15 point, Centered aligned.

(April 2022) - Arial, 9 point, Centered aligned.

IVES Request for Transcript of Tax Return - Arial, Bold, 15 point, Centered aligned.

Department of the Treasury - Internal Revenue Service - Arial, 8 point, Centered aligned.

OMB Number 1545-1872 - Arial, 9 point, Centered aligned.

Form Footer Fonts:

Catalog Number 72627P - Arial, 8 point, Left aligned.

www.irs.gov - Arial, 8 point, Centered aligned.

Form - Arial, 8 point, Right aligned.

4506-C - Arial, Bold, 12 point, Right aligned.

(Rev. 4-2022) - Arial, 8 point, Right aligned.

For Privacy Act and Paperwork Reduction Act Notice, see page 2 - Arial, Bold, 8 point, Left aligned.

Instruction Fonts:

Title: Arial, Bold, 12 point, Centered aligned.

Subheaders: Arial, Bold, 9 point, Left aligned, 3 point spacing below.

Body/Table Text: Arial, 7 point, Left aligned, 3 point spacing below (use of bold and italic as indicated on form).

Borders:

Top Page Border: 2 point, black, solid, X: 0.3in x Y: 0.3in

Bottom Page Border: 2 point, black, solid, X: 0.3in x Y: 10.5in

Field Borders: 0.5 point, black, solid

Bold Borders: 1 point, black, solid

Check Boxes (CB): 10 point square (W: 0.1389in x H: 0.1389in).

Line 8 Field Coordinates:

X: 0.3in x Y: 7.1in; W: 0.3in x H: 0.2in

X: 0.7in x Y: 7.1in; W: 0.3in x H: 0.2in

X: 1.1in x Y: 7.1in; W: 0.4in x H: 0.2in

X: 2.55in x Y: 7.1in; W: 0.3in x H: 0.2in

X: 2.95in x Y: 7.1in; W: 0.3in x H: 0.2in

X: 3.35in x Y: 7.1in; W: 0.4in x H: 0.2in

X: 4.75in x Y: 7.1in; W: 0.3in x H: 0.2in

X: 5.15in x Y: 7.1in; W: 0.3in x H: 0.2in

X: 5.55in x Y: 7.1in; W: 0.4in x H: 0.2in

X: 7.0in x Y: 7.1in; W: 0.3in x H: 0.2in

X: 7.4in x Y: 7.1in; W: 0.3in x H: 0.2in

X: 7.8in x Y: 7.1in; W: 0.4in x H: 0.2in

Note: the sizing of the fields in this form are off to fit the data, follow the numbers provided.