

NYSSCPA E-zine's



New York News

IRS Gives NYSSCPA Committee E-File Presentation

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Virtually every taxing authority—federal, state and local—is encouraging and even requiring e-filing, and someday soon a paper 1040 may be as hard to find in a CPA's office as an adding machine.

To make the ongoing e-filing transition smoother, the NYSSCPA Taxation of Individuals Committee hosted a CPE session earlier this month, Susan R. Marks-Jensky, an IRS stakeholder liaison, walked both in-person and virtual attendees through the basics. As committee member Peter Alizio, pointed out, she gave individual attention to those who remained after the presentation was over.

Marks-Jensky started with the [registration process](#), and clarified the information tax preparers need about themselves for getting started with e-services generally.

- Legal Name
- Social Security Number
- Date of birth
- Telephone number
- E-mail address
- Adjusted gross income
- User name
- Password and PIN
- Reminder question
- Home mailing address

She also handed out a FAQ booklet that highlighted security issues in particular. For example, a tax preparer cannot use certain e-services until the IRS has sent a letter through standard mail, which confirms registration. Specifically, registrants can update their IRS address-of-record by entering a new address during

registration. However, the IRS will mail a letter to the old address. This will alert a potential identity theft victim in the event a criminal is posing as a legitimate practitioner or taxpayer and trying to forward sensitive information to his own residence.

Also, although there is a way to reset a forgotten password, practitioners cannot simply call the IRS to recover it—even the service doesn't store these, for security purposes.

Marks-Jensky also discussed [special features](#) available only to select groups of tax preparers, including CPAs. These include:

- *Disclosure Authorization.* [Eligible tax professionals](#) can complete disclosure authorization forms, and view and modify existing forms, all online. Tax professionals can electronically submit Form 2848, *Power of Attorney and Declaration of Representative*; and Form 8821, *Tax Information Authorization*.
- *Electronic Account Resolution.* Tax professionals using EAR can quickly resolve clients' account problems by electronically sending and receiving inquiries about individual or business account problems, refunds, installment agreements, missing payments or notices.
- *Transcript Delivery System.* TDS resolves clients' need for return and account information quickly in a secure, online session. It allows eligible tax professionals, with a power of attorney (Form 2848) on file, to request and receive account transcripts, wage and income transcripts, tax return transcripts, and verification of non-filing letters for individual taxpayers and account transcripts for business taxpayers.

Room for Improvement

Although he voiced no criticism of the presentation, committee member Marc J. Strohl wants to see some changes in the process.

"I think the IRS can do a better job integrating e-services, e-filing, PTIN services and make the on-line access more user friendly and easier to navigate," he said. He found the system is overly complicated, and thought the registration process burdensome and password maintenance laborious.

However, he did find the system useful for obtaining transcripts, account resolutions and the power of attorney function.

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