



IVES Policy Update Effective June 30, 2024

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IVES Program e-News and Updates

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[e-Services - Online Tools for Tax Professionals \(Transcript Delivery System for IVES\)](#)

Income Verification Express Services (IVES) Policy Update Effective June 30, 2024

Dear IVES Participants,

The IVES program recently updated its policy to further ensure taxpayer data is safeguarded. Effective **June 30, 2024**, the IRS will only provide IVES transcripts to mortgage lending firms for the sole purpose of obtaining a mortgage on residential or commercial real property (land and buildings).

All IVES participants using fax requests (legacy system), Web User Interface (WebUI), or Application to Application (A2A) channels must **re-apply** to the IVES program by **May 1, 2024**, to remain in active status. Participants must complete [Form 13803, Application to Participate in the Income Verification Express Service \(IVES\) Program](#), fax the new application to 844-251-8254, and declare their sole purpose for using IVES is to secure third party tax data needed for a mortgage on residential or commercial real property (real estate).

The IRS remains dedicated to safeguarding taxpayer data, maintaining the integrity of our tax systems, and modernizing our systems. If tax transcript information is required by your firm for other than securing a mortgage, we recommend requesting it directly from the taxpayer. Taxpayers can request their tax transcript information by calling the Interactive Voice Response (IVR) at 800-908-9946 or accessing their [online account](#), which allow the taxpayers to request and receive real time responses.

Thank you,

IRS IVES Team

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