



# MANUAL TRANSMITTAL

Department of the Treasury  
Internal Revenue Service

2.3.63

JULY 31, 2023

## EFFECTIVE DATE

(07-31-2023)

## PURPOSE

- (1) This transmits revised IRM 2.3.63, IDRS Terminal Responses, Command Codes RPVUE, RPVCU and RPPRT.

## MATERIAL CHANGES

- (1) IRM 2.3.63.1, updated Internal Controls for this IRM.

## EFFECT ON OTHER DOCUMENTS

IRM 2.3.63, dated August 15, 2017, is superseded.

## AUDIENCE

LMSB, SBSE, TEGE, Return Preparer Office, and W&I.

Kaschit Pandya,  
Acting, Chief Information Officer



2.3.63

Command Codes RPVUE, RPVCU, and RPPRT

## Table of Contents

2.3.63.1 Program Scope and Objectives

2.3.63.1.1 Background

2.3.63.1.2 Authority

2.3.63.1.3 Responsibilities or Roles and Responsibilities

2.3.63.1.4 Program Management and Review

2.3.63.1.5 Program Controls

2.3.63.1.6 Terms/Definitions/Acronyms

2.3.63.2 Command Code RPVUE

2.3.63.3 Command Code RPPRT

Exhibits

2.3.63-1 CC RPVCU, RPVUE and RPPRT Input Format

2.3.63-2 CC RPVUE, RPVCU and RPPRT Error Screen

2.3.63-3 CC RPVUE and RPVCU Summary Screen

2.3.63-4 CC RPVUE and RPVCU Page or Group Screen

2.3.63-5 CC RPPRT Acknowledgment Screen

2.3.63-6 CC RPVUE PTIN information Screen



2.3.63.1  
(07-31-2023)  
**Program Scope and Objectives**

- (1) The Return Preparer Inventory On-Line (RPVOL) system provides users access to Tax Preparer and associated taxpayer data. This information is extracted from the Individual Return Transaction File (IRTF) and the Business Return Transaction File (BRTF). The current year data and three prior years are maintained.
- (2) **Purpose:** This transmits revised IRM 2.3.63, IDRS Terminal Responses, Command Codes RPVUE, RPVCU and RPPRT.
- (3) **Audience:** LMSB, SBSE, TEGE, Return Preparer Office, and W&I.
- (4) **Policy Owner:** Kaschit Pandya, Acting Chief Information Officer
- (5) **Program Owner:** Application Development, Corporate Data in Information Technology
- (6) **Primary Stakeholders:** Wage and Investment and Return Preparer’s Office
- (7) **Program Goals:** The goal of the program is to provide support to Return Preparer’s office to improve tax payer compliance by providing comprehensive oversight and support of tax professionals

2.3.63.1.1  
(08-15-2017)  
**Background**

- (1) IRS Return Preparer Office was created in 2010 to oversee registration and suitability of federal tax return preparers.

2.3.63.1.2  
(08-15-2017)  
**Authority**

- (1) None

2.3.63.1.3  
(08-15-2017)  
**Responsibilities or Roles and Responsibilities**

- (1) Return Preparer’s Office personnel responsible for monitoring and tracking the return preparer’s activity using the command codes RPVUE, RPVCU, and RPPRT.
- (2) Applications Development is responsible for Operations and Maintenance of the command codes.

2.3.63.1.4  
(08-15-2017)  
**Program Management and Review**

- (1) **Program Reports:** RPVOL information stored in the database located at MCC is the primary source of information required for Return Preparer’s Office.
- (2) **Program Effectiveness:** N/A

2.3.63.1.5  
(08-15-2017)  
**Program Controls**

- (1) None

2.3.63.1.6  
(08-15-2017)  
**Terms/Definitions/ Acronyms**

- (1) The following table provides common acronyms throughout this IRM:

Acronym	Definition
ITM	Integrated Talent Management
IRTF	Individual Return Transactions File

Acronym	Definition
BRTF	Business Return Transactions File
BMF	Business Master File
IMF	Individual Master File
RPO	Return Preparer's Office
W&I	Wage and Investment
PTIN	(Return) Preparer Tax Identification Number
SIDN	Site Identifications Number - used in place of a PTIN to query information
MCC	Martinsburg Computing Center

2.3.63.2  
(03-20-2006)

**Command Code RPVUE**

- (1) This command code accesses the current year or three prior years data.
- (2) The output can be a summary screen, page request screen or group request screen depending on the definer.
- (3) The following informational messages for CC RPVCU and RPVUE can be found on line 24:
  - a. NAP INFORMATION NOT FOUND— The National Accounts Profile (NAP) did not find any information for the TIN that was input.
  - b. NAP FILE UNAVAILABLE— The National Accounts Profile (NAP) was not available, try again later.
  - c. NAP PUT FUNCTION UNSUCCESSFUL
  - d. SEVERE ERROR ACCESSING NAP FILE
  - e. NAP DATA OUT OF SEQUENCE
  - f. EOF REACHED
  - g. SOC7 OCCURRED — CONTACT IDRS TECH
  - h. REC FOUND WITH INSIGNIFICANT DATA
  - i. INVALID REQUEST — CHECK INPUT
  - j. MFT WHEN PRESENT MUST HAVE 2 CHARACTERS
  - k. TAX PERIOD WHEN PRESENT MUST HAVE 6 CHARACTERS
  - l. TXPYR TIN WHEN PRESENT MUST HAVE 11–12 CHARACTERS
  - m. FORM NUMBER WHEN PRESENT MUST HAVE 4–5 CHARACTERS
  - n. DO WHEN PRESENT MUST HAVE 2 CHARACTERS
  - o. DEFINER WHEN PRESENT MUST HAVE 2–5 CHARACTERS
  - p. MFT MUST BE CONSISTENT WITH FORM NUMBER
  - q. FORM NUMBER IS INVALID – CHECK INPUT — Form number must be one of the following: 1040, 1041, 1065, 1120, 1120A or 1120S.
  - r. DO CODE IS INVALID — CHECK INPUT— The district office code is not valid.
  - s. THE TIN FIELD IS INVALID — CHECK INPUT— The TIN is not numeric or is not in the correct format.
  - t. THE PTIN DOES NOT HAVE AN SSN ASSOCIATED WITH IT

- u. PROCESSING YEAR MUST BE > 1999 FOR PTINS— PTIN's did not exist prior to the year 2000.
- v. THE MFT CODE MUST BE 02, 05, 06, 30
- w. THE TAX PERIOD MUST BE NUMERIC — CHECK INPUT
- x. THE RETURN INDICATOR MUST BE I OR B — CHECK INPUT
- y. THE TIN VALIDITY INDICATOR IS INCONSISTENT OR IN ERROR — CHECK INPUT— The display file source code must be space, \*, V or W.
- z. THE PTIN FIELD IS INVALID – CHECK INPUT — The format for a PTIN is “P” followed by 8 numerics.
- aa. NO RECORDS MATCH THE INPUT TIN. PTIN CROSS REFERENCE FILE NOT ACCESSIBLE
- ab. XREF FILE UNAVAILABLE. ONLY INFO FOR INPUT TIN GIVEN. TRY AGAIN LATER
- ac. PTIN XREF FILE ERROR, XREF FILE UNACCESSIBLE. ONLY INPUT TIN INFO AVAILABLE
- ad. THERE ARE TOO MANY OPTIONAL FIELDS PRESENT.— The maximum number of optional fields is 5.
- ae. TOO MANY RECORDS - NARROW SCOPE OF SEARCH
- af. MAXIMUM RECORDS READ (20000). CHANGE SEARCH CRITERIA. COULD BE MORE MATCHES
- ag. MAXIMUM RECORDS READ (20000). NO MATCH FOUND. CHANGE SEARCH CRITERIA
- ah. FILE ERROR CODE ON RPV FILE, CONTACT IDRS TECHNICIAN
- ai. REQUEST CAN NOT BE SERVICED AT THIS TIME, TRY AGAIN LATER
- aj. THE REQUESTED RPV ENTRY DOESN'T EXIST
- ak. NO RECORDS MATCH THE CRITERIA SELECTED
- al. THE DEFINER CODE IS INVALID— The definer code must be spaces, SM, P or GR.
- am. THE SCREEN REQUESTED IS NOT AVAILABLE — CHECK INPUT
- an. INVALID PROCESSING YEAR. ONLY CURRENT YEAR AND 3 PRIOR YEARS ARE VALID
- ao. PAGING ERROR HAS OCCURRED — TRY ENTERING ORIGINAL TRANSACTION AGAIN
- ap. PAGE NUMBER IS INVALID. PAGE NUMBER 1 ASSUMED
- aq. GROUP NUMBER IS INVALID. GROUP NUMBER 1 ASSUMED

2.3.63.3  
(03-20-2006)

**Command Code RPPRT**

- (1) This command code is accessed with the same inputs as command code RPVUE with the exception of the definer.
- (2) Reports are generated weekly. If no information matches the request, the user will be notified on-line.
- (3) The following informational messages for CC RPPRT can be found on lines 14 and 15:
  - a. NAP INFORMATION NOT FOUND— The National Accounts Profile (NAP) did not find any information for the TIN that was input.
  - b. NAP VSAM FILE UNAVAILABLE— The National Accounts Profile (NAP) was not available, try again later.
  - c. NAP PUT FUNCTION UNSUCCESSFUL
  - d. SEVERE ERROR ACCESSING NAP FILE
  - e. NAP DATA OUT OF SEQUENCE
  - f. EOF REACHED
  - g. SOC7 OCCURRED — CONTACT IDRS TECH
  - h. REC FOUND WITH INSIGNIFICANT DATA

- i. INVALID REQUEST — CHECK INPUT
- j. MFT WHEN PRESENT MUST HAVE 2 CHARACTERS
- k. TAX PERIOD WHEN PRESENT MUST HAVE 6 CHARACTERS
- l. TXPYR TIN WHEN PRESENT MUST HAVE 11–12 CHARACTERS
- m. FORM NUMBER WHEN PRESENT MUST HAVE 4–5 CHARACTERS
- n. DO WHEN PRESENT MUST HAVE 2 CHARACTERS
- o. MFT MUST BE CONSISTENT WITH FORM NUMBER
- p. FORM NUMBER IS INVALID — CHECK INPUT— The form number must be one of the following: 1040, 1041, 1065, 1120, 1120A or 1120S.
- q. DO CODE IS INVALID — CHECK INPUT— The district office code is not valid.
- r. THE TIN FIELD IS INVALID — CHECK INPUT— The TIN is not numeric or is not in the correct format.
- s. THE PTIN DOES NOT HAVE AN SSN ASSOCIATED WITH IT
- t. PROCESSING YEAR MUST BE > 1999 FOR PTINS
- u. PROCESSING YEAR MUST BE > 1999 FOR PTINS— PTIN's did not exist prior to the year 2000.
- v. THE MFT CODE MUST BE 02, 05, 06, 30
- w. THE TAX PERIOD MUST BE NUMERIC — CHECK INPUT
- x. THE RETURN INDICATOR MUST BE I OR B — CHECK INPUT.
- y. THE TIN VALIDITY INDICATOR IS INCONSISTENT OR IN ERROR — CHECK INPUT— The display file source code must be space, \*, V or W
- z. THE PTIN FIELD IS INVALID — CHECK INPUT— The format for a PTIN is "P" followed by 8 numerics.
- aa. NO RECORDS MATCH THE INPUT TIN. PTIN CROSS REFERENCE FILE NOT ACCESSIBLE
- ab. XREF FILE UNAVAILABLE. ONLY INFO FOR INPUT TIN GIVEN. TRY AGAIN LATER
- ac. PTIN XREF FILE ERROR, XREF FILE UNACCESSIBLE. ONLY INPUT TIN INFO AVAILABLE
- ad. THERE ARE TOO MANY OPTIONAL FIELDS PRESENT— The maximum number of optional fields is 5.
- ae. MAXIMUM RECORDS READ (20000). CHANGE SEARCH CRITERIA. COULD BE MORE MATCHES
- af. MAXIMUM RECORDS READ (20000). NO MATCH FOUND. CHANGE SEARCH CRITERIA
- ag. FILE ERROR CODE ON RPV FILE, CONTACT IDRS TECHNICIAN
- ah. REQUEST CAN NOT BE SERVICED AT THIS TIME, TRY AGAIN LATER
- ai. THE REQUESTED RPV ENTRY DOESN'T EXIST
- aj. FILE ERROR CODE ON WRITING FILE, CONTACT IDRS TECHNICIAN
- ak. INVALID PROCESSING YEAR. ONLY CURRENT YEAR AND 3 PRIOR YEARS ARE VALID
- al. THIS REPORT HAS ALREADY BEEN REQUESTED. A SECOND REPORT WILL NOT BE PRINTED.
- am. INFORMATION FOR BOTH THE INPUT TIN AND THE ASSOCIATED TIN WERE FOUND
- an. INFORMATION WAS FOUND FOR THE INPUT TIN ONLY. INFORMATION WAS NOT FOUND FOR THE ASSOCIATED TIN.
- ao. INFORMATION WAS FOUND FOR THE ASSOCIATED TIN ONLY. INFORMATION WAS NOT FOUND FOR THE INPUT TIN

**Exhibit 2.3.63-1 (04-27-2016)**  
**CC RPVCU, RPVUE and RPPRT Input Format**

This screen represents all of the possible fields of the input request. Items 1 through 4 are required fields while the remaining fields are optional. The optional fields are followed by a comma. Missing optional fields are represented by a comma. Also note that items 7 and 8 can be variable lengths. The items following are positioned with items 7 and 8 being the maximum length.

1-10	11-20	21-30	31-40	41-50	51-60	61-70	71-80
1234567890	1234567890	1234567890	1234567890	1234567890	1234567890	1234567890	1234567890
1 [ 1 ] [ 2 ] [	3	]4 5 , [ 6 ] , [	7	]8 , [ 9 ] , 10 [ 11 ]			

24

1234567890	1234567890	1234567890	1234567890	1234567890	1234567890	1234567890	1234567890
1-10	11-20	21-30	31-40	41-50	51-60	61-70	71-80

Record Element Specification

**Exhibit 2.3.63-1 (Cont. 1) (04-27-2016)**  
**CC RPVCU, RPVUE and RPPRT Input Format**

<b>Item Number</b>	<b>Line</b>	<b>Col.</b>	<b>Description and Validity</b>
1	1	1-5	COMMAND CD — RPVUE RPVCU RPPRT
2	1	7-10	PROCESSING YEAR — ccyy (current year or 3 prior years)
3	1	11-21	TAX PREPAPER TIN— nnn-nn-nnnn nn-nnnnnnn Pnnnnnnnn Snnnnnnnn
4	1	22	TAX RETURN TYPE— I (IMF) B (BMF) P (PTIN)
5	1	23-24	MFT CD – 30, 02, 05, or 06
5	1	23-27	The same field can be either MFT CD or Page Number or Group Number Pnnnn (Page request screen) GRnnn (Group request screen)
6	1	26-31	TAX PRD — ccyymm
7	1	33-43	TAXPAYER TIN — nnn-nn-nnnn nn-nnnnnnn
8	1	44	TAXPAYER TIN IND — blank, *, V or W
9	1	46-50	FORM NUMBER – 1040, 1041, 1065, 1120, 1120A or 1120S
10	1	52-53	DISTRICT OFFICE CD — nn for returns filed after 01-01-2002 (PY2002) use the Universal Location Code (ULC) and for returns filed prior to 01-01-2002 (PY2001 and prior) use the old district office codes
11	1	54-58	TYPE OF RESPONSE CD — Blank (Summary screen) SM (Summary screen) Pnnnn (Page request screen) GRnnn (Group request screen)

**Exhibit 2.3.63-2 (03-20-2006)**  
**CC RPVUE, RPVCU and RPPRT Error Screen**

This is the response screen layout used for displaying error messages for all RPVOL command codes.

```

      1-10      11-20      21-30      31-40      41-50      51-60      61-70      71-80
-----|-----|-----|-----|-----|-----|-----|-----|
1234567890123456789012345678901234567890123456789012345678901234567890
1 [                1                ]

24[                2                ]
1234567890123456789012345678901234567890123456789012345678901234567890
-----|-----|-----|-----|-----|-----|-----|-----|
      1-10      11-20      21-30      31-40      41-50      51-60      61-70      71-80
    
```

Record Element Specification

<u>Item Number</u>	<u>Line</u>	<u>Col.</u>	<u>Description and Validity</u>
1	1	1-58	REQUEST RECORD- Character
2	24	1-79	ERROR MESSAGE - Character

Exhibit 2.3.63-3 (03-20-2006)
CC RPVUE and RPVCU Summary Screen

This response screen contains various counts of Tax Preparer summary information along with the number of pages or screens of information related to the request. The user can then request a specific page (or screen) or a specific group of pages (or screens).

1-10 11-20 21-30 31-40 41-50 51-60 61-70 71-80
-----|-----|-----|-----|-----|-----|-----|-----|
1234567890123456789012345678901234567890123456789012345678901234567890
1 [ 1 ] PAGE: [ 2 ] of [ 3 ]
2
3 TP TIN: [ 4 ] MFT: 5 TX PRD: [ 6 ] DLN: [ 7 ] GRP CD: 8
4 RFBL:[ 9 ] TOT TX: [ 10 ] TXBL INCM :[ 11 ] SCHF: [ 12 ]
5 EITC: [ 13 ] GAS CR: [ 14 ] TOT CONTRB:[ 15 ] SCHC: [ 16 ]
6 MISC:[ 17 ] RENTAL:[ 18 ] PTNR/SCORP:[ 19 ]
7
8 TP TIN: [ 4 ] MFT: 5 TX PRD: [ 6 ] DLN: [ 7 ] GRP CD: 8
9 RFBL:[ 9 ] TOT TX: [ 10 ] TXBL INCM :[ 11 ] SCHF: [ 12 ]
10 EITC: [ 13 ] GAS CR: [ 14 ] TOT CONTRB:[ 15 ] SCHC: [ 16 ]
11 MISC:[ 17 ] RENTAL:[ 18 ] PTNR/SCORP:[ 19 ]
12
13 TP TIN: [ 4 ] MFT: 5 TX PRD: [ 6 ] DLN: [ 7 ] GRP CD: 8
14 RFBL:[ 9 ] TOT TX: [ 10 ] TXBL INCM :[ 11 ] SCHF: [ 12 ]
15 EITC: [ 13 ] GAS CR: [ 14 ] TOT CONTRB:[ 15 ] SCHC: [ 16 ]
16 MISC:[ 17 ] RENTAL:[ 18 ] PTNR/SCORP:[ 19 ]
17
18 TP TIN: [ 4 ] MFT: 5 TX PRD: [ 6 ] DLN: [ 7 ] GRP CD: 8
19 RFBL:[ 9 ] TOT TX: [ 10 ] TXBL INCM :[ 11 ] SCHF: [ 12 ]
20 EITC: [ 13 ] GAS CR: [ 14 ] TOT CONTRB:[ 15 ] SCHC: [ 16 ]
21 MISC:[ 17 ] RENTAL:[ 18 ] PTNR/SCORP:[ 19 ]
22
23
24[ 20 ]

1-10 11-20 21-30 31-40 41-50 51-60 61-70 71-80
-----|-----|-----|-----|-----|-----|-----|-----|
1234567890123456789012345678901234567890123456789012345678901234567890

Record Element Specification

**Exhibit 2.3.63-3 (Cont. 1) (03-20-2006)**  
**CC RPVUE and RPVCU Summary Screen**

<b>Item Number</b>	<b>Line</b>	<b>Col.</b>	<b>Description and Validity</b>
1	1	1-58	REQUEST RECORD — character
2	2	25-35	TAX PREPARER TIN — nnn-nn-nnnn nn-nnnnnnn Pnnnnnnnn
3	2	65-68	RETURNS PREPARED COUNT — numeric
4	3	25-35	CROSS REFERENCE TIN — nnn-nn-nnnn Pnnnnnnnn
5	5	1-35	PRIMARY NAME — character
6	5	36-70	SECONDARY NAME — character
7	6	1-35	STREET ADDRESS — character
8	6	37-58	CITY — character
9	6	60-61	STATE CD — character
10	6	64-73	ZIP CD— nnnnn-nnnn
11	7	22-24	REFUND RETURNS PERCENT — numeric
12	7	63-66	REFUND RETURNS COUNT — numeric
13	8	22-24	EIC PERCENT — numeric
14	8	63-66	EIC COUNT — numeric
15	9	18-21	PROCESSING YEAR — character
16	13	20-23	TOTAL PAGE COUNT — numeric
17	14	21-23	TOTAL GROUP COUNT — numeric
18	24	1-79	ERROR MESSAGE — character

Exhibit 2.3.63-4 (03-20-2006)
CC RPVUE and RPVCU Page or Group Screen

This response screen is used to display taxpayer information for a given tax preparer. One page is equivalent to one screen. Each page of the multiple page screen or group screen has a layout identical to the single page request. One group is equivalent to 20 pages or screens.

Note: Money amounts are only for IMF returns.

1-10 11-20 21-30 31-40 41-50 51-60 61-70 71-80
1234567890123456789012345678901234567890123456789012345678901234567890
1 [ 1 ] SUMMARY
2 PREPARER TIN: [ 2 ] # OF RETURNS PREPARED: [ 3]
3 ASSOCIATED TIN: [ 4 ]
4 PREPARER ENTITY INFO:
5 [ 5 ] [ 6 ]
6 [ 7 ] [ 8 ] 9 [ 10 ]
7 % OF REFUND RETURNS: 11 # OF REFUND RETURNS: 12
8 % OF EIC RETURNS: 13 # OF EIC RETURNS: 14
9 PROCESSING YEAR: 15
13# PAGES AVAILABLE: 16
14 # GROUPS AVAILABLE: 17
24[ 18 ]
1234567890123456789012345678901234567890123456789012345678901234567890
1-10 11-20 21-30 31-40 41-50 51-60 61-70 71-80

Record Element Specification

## Exhibit 2.3.63-4 (Cont. 1) (03-20-2006)

## CC RPVUE and RPVCU Page or Group Screen

<b>Item Number</b>	<b>Line</b>	<b>Col.</b>	<b>Description and Validity</b>
1	1	1-58	REQUEST RECORD — character
2	1	68-71	PAGE NUMBER — character
3	1	76-79	TOTAL PAGE COUNT— character
4	3,8,13,18	9-19	TAXPAYER TIN — character
5	3,8,13,18	26-27	MFT CD — character
6	3,8,13,18	37-42	TAX PRD— character
7	3,8,13,18	49-65	DLN — character
8	3,8,13,18	75-76	GROUP CODE — character
9	4,9,14,19	7-17	BALANCE DUE OR REFUND AMT — numeric
10	4,9,14,19	27-37	ACCEPTABLE TOTAL TAX AMT — numeric
11	4,9,14,19	51-61	TAXABLE INCOME AMT — numeric
12	4,9,14,19	69-79	SCHEDULE F PROFIT LOSS AMT — numeric
13	5,10,15,20	7-17	EARNED INCOME CREDIT AMT — numeric
14	5,10,15,20	27-37	GAS CREDIT AMT — numeric
15	5,10,15,20	51-61	TOTAL CONTRIBUTIONS AMT— numeric
16	5,10,15,20	69-79	SCHEDULE C PROFIT LOSS AMT — numeric
17	6,11,16,21	7-17	JOB EXPNS N MISC DEDUCTNS AMT — numeric (job expense and miscellaneous deductions amount)
18	6,11,16,21	27-37	TOT RNTL N RYLTY INCM LOSS AMT — numeric (total rental real estate and royalty income/loss amount)
19	6,11,16,21	51-61	PTRNSHP S CORP INCM LOSS AMT — numeric (partnership and S corporation income/loss amount)
20	24	1-79	ERROR MESSAGE — character

**Exhibit 2.3.63-5 (03-20-2006)  
CC RPPRT Acknowledgment Screen**

This screen gives the user a confirmation message when the information is found or an error message when the information is not found.

1-10	11-20	21-30	31-40	41-50	51-60	61-70	71-80
1234567890	1234567890	1234567890	1234567890	1234567890	1234567890	1234567890	1234567890
1 [			1	]			VERIFICATION
2							
3							
4 PREPARER TIN:[	2	]					
5							
6 PREPARER ENTITY INFO:							
7 [		3	]				
8 [		4	]				
9 [		5	]				
10 [	6	],	7	[	8	]	
11 PROCESSING YEAR: [	9	]					
12							
13 [				10			]
14 [				11			]
15 [				12			]
1-10	11-20	21-30	31-40	41-50	51-60	61-70	71-80
1234567890	1234567890	1234567890	1234567890	1234567890	1234567890	1234567890	1234567890

Record Element Specification

**Exhibit 2.3.63-5 (Cont. 1) (03-20-2006)**  
**CC RPPRT Acknowledgment Screen**

<b>Item Number</b>	<b>Line</b>	<b>Col.</b>	<b>Description and Validity</b>
1	1	1-53	REQUEST RECORD — character
2	3	15-25	TAX PREPARER TIN — character
3	6	1-35	PRIMARY NAME — character
4	7	1-35	SECONDARY NAME — character
5	8	1-35	STREET ADDRESS — character
6	9	1-22	CITY — character
7	9	27-28	STATE CD — character
8	9	33-42	ZIP CD — nnnnn-nnnn
9	11	18-21	PROCESSING YEAR — numeric
10	13	1-79	VERIFICATION MESSAGE— character
11	14	1-79	CONFIRMATION MESSAGE/ERROR MESSAGE — character
12	15	1-79	CONFIRMATION MESSAGE (cont.) — character

Exhibit 2.3.63-6 (08-15-2017)
CC RPVUE PTIN information Screen

This screen gives the information to the user about the PTIN entered.

Terminal screen output showing PTIN information including fields for TIN, issuance date, status, mailing address, and various tax-related flags like AFSP and FELONY.

**Exhibit 2.3.63-6 (Cont. 1) (08-15-2017)**  
**CC RPVUE PTIN information Screen**

```

-----+-----1-----+-----2-----+-----3-----+-----4-----+-----5-----+-----6-----+-----7-----+-----8
1234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890

01 RPVUE 2014XXXXXXXXXXXXP                                     PREPARER INFO PG 2
02 PREPARER TIN: XXXXXXXXXXXX   PTIN NUMBER ISSUANCE DATE: YYYY-MM-DD
03 ASSOCIATED TIN: XXXXXXXXXXXX   PTIN STATUS: XXXXXXXXXXXXXXXXX
04 PERMANENT MAILING ADDR:
05 [                                                                                                     ] XXXX
06 [                                                                                                     ]
07 [                                                                                                     ] [
08 [                                                                                                     ] XX XXXXXXXXXXXX XXX
09 BUSINESS INFORMATION:
10 EIN: XXXXXXXXXXX
11 [                                                                                                     ]
12 [                                                                                                     ] [
13 [                                                                                                     ] [
14 [                                                                                                     ] XX XXXXXXXXXXXX XXX
15 BUSINESS PHONE #: XXXXXXXXXXXXXXXXXXXX XXXXX
16 BUSINESS WEBSITE: [                                                                                                     ]
17 FILE NUMBER: XXXXXXXXXXXX   PTIN RENEWL DATE: YYYY-MM-DD   PTIN EXP DATE: YYYY-MM-DD
18 AFSP ISS: YYYY-MM-DD       AFSP PARTICIPANT: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
19 AFSP ROC READ: X   AFSP FEL EXMP: X   PREPARER OPT OUT PREPARER DIRECTORY: X
20 REG METHOD: X   REN METHOD:
21 CE CRED FED: XXX   CE CRED FED UPD: XXX
22 CE CRED FED ETH: XXX
23 REACTIVATION DATE: YYYY-MM-DD   STATUS CHANGE DATE: YYYY-MM-DD
24 [                                                                                                     ]

1234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890
-----+-----1-----+-----2-----+-----3-----+-----4-----+-----5-----+-----6-----+-----7-----+-----8

```

Record Element Specification

## Exhibit 2.3.63-6 (Cont. 2) (08-15-2017)

## CC RPVUE PTIN information Screen

<b>Item Number</b>	<b>Line</b>	<b>Col.</b>	<b>Description and Validity</b>
1	1	1-53	REQUEST RECORD — character
2	2	15-25	TAX PREPARER TIN — character
3	2	57-66	PTIN NUMBER ISSUANCE DATE— character
4	3	17-27	ASSOCIATED TIN— number
5	3	57-61	PTIN STATUS— character, some of the statuses are Provisional/Active
6	5	1-60	PERMANENT MAILING ADDRESS NAME — character
7	5	62-65	PERMANENT MAILING ADDRESS SUFFIX— character
8	6	1-30	PERMANENT MAILING ADDRESS,ADDRESS LINE1— character
9	7	1-40	PERMANENT MAILING ADDRESS ADDRESS LINE2— character
10	7	41-40	PERMANENT MAILING ADDRESS ADDRESS LINE3— character
11	8	1-20	PERMANENT MAILING ADDRESS CITY— character
12	8	27-28	PERMANENT MAILING ADDRESS STATE— character
13	8	42-51	PERMANENT MAILING ADDRESS COUNTRY— character
14	9	17-26	Effective Date associated with the preparer's most recent Record of Completion. — character
15	9	42-51	Completion Date associated with the preparer's most recent AFSP refresher course. — character
16	10	10-19	PHONE NUMBER — number
17	10	28-31	EXTENSION — number
18	10	39-48	DATE OF BIRTH — character
19	11	13-52	E-MAIL ADDRESS — character
20	12	9-15	EFIN # — number
21	12	25-34	CAF # — number
22	13	13	OFFICE OWN, Identification of Self-Employed/Owner/Corporate Officer response associated with the preparer's PTIN account — character
23	13	50	1040 FILER, Self-reported response for preparing Form 1040 series tax returns associated with the preparer's PTIN account — character
24	14	20	SYS TX COMP CHECK, Tax Compliance Status associated with the preparer's PTIN account— character
25	14	52	AFSP TX COMP CHECK EXEMPT, an indicator that says if the preparer is exempt from possessing a "Pass" Tax Compliance Check result— character

**Exhibit 2.3.63-6 (Cont. 3) (08-15-2017)**  
**CC RPVUE PTIN information Screen**

<b>Item Number</b>	<b>Line</b>	<b>Col.</b>	<b>Description and Validity</b>
26	14	78	SELF ATTEST TX COMP, Self-reported tax compliance response associated with the preparer’s registration or renewal application— character
27	15	20	AFSP RES CRS EXMP, an indicator that says if the preparer is exempt from taking a Annual Federal Tax Refresher (AFTR) course for their AFSP Record of Completion. — character
28	15	38	AFSP INELIG, Ineligible List Status associated with the preparer’s PTIN account— character
29	15	58	RESTRICTED, Prevent PTIN Issuance List Status associated with the preparer’s PTIN account — character
30	16	20-80	PROFESSIONAL CREDENTIALS EXPIRATION DATE LINE1— character
31	17	1-75	PROFESSIONAL CREDENTIALS EXPIRATION DATE LINE2— character
32	18	1-75	PROFESSIONAL CREDENTIALS EXPIRATION DATE LINE3— character
33	19	1-75	PROFESSIONAL CREDENTIALS EXPIRATION DATE LINE4— character
34	20	1-75	PROFESSIONAL CREDENTIALS EXPIRATION DATE LINE5— character
35	21	1-75	PROFESSIONAL CREDENTIALS EXPIRATION DATE LINE6— character
36	22	1-77	PROFESSIONAL CREDENTIALS EXPIRATION DATE LINE7— character
37	10	1-8	BUSINESS INFORMATION EIN— number
38	11	1-64	BUSINESS INFORMATION NAME — character
39	12	1-29	BUSINESS INFORMATION ADDRESS LINE 1 — character
40	12	33-72	BUSINESS INFORMATION ADDRESS LINE 2 — character
41	13	33-72	BUSINESS INFORMATION ADDRESS LINE 3 — character
42	14	1-19	BUSINESS INFORMATION CITY — character
43	14	23-24	BUSINESS INFORMATION STATE — character
44	14	27-36	BUSINESS INFORMATION ZIP — character
45	14	39-41	BUSINESS INFORMATION COUNTRY — character
46	15	19-34	BUSINESS INFORMATION PHONE— number
47	15	38-41	BUSINESS INFORMATION EXTENSION — number

## Exhibit 2.3.63-6 (Cont. 4) (08-15-2017)

## CC RPVUE PTIN information Screen

<u>Item Number</u>	<u>Line</u>	<u>Col.</u>	<u>Description and Validity</u>
48	16 17	19-78 19-58	Business web site associated with the preparer's PTIN account — character
49	17	13-22	FILE NUMBER
50	17	43-52	PTIN Renewal Date (most recent date on which PTIN was renewed) — date
51	17	70-79	PTIN Expiration Date (displays if PTIN status is "Expired")— date
52	18	21-30	AFSP ISS, most recent AFSP Record of Completion issuance date associated with preparer's PTIN account.— date
53	18	46-55	AFSP PARTICIPANT, RTRP License Proficiency (RTRP/SP40/ PTIN/ Null) — character
54	19	18	AFSP ROC READ, Flag that says if the preparer is exempt from taking a refresher course for their AFSP Record of Completion. (P/F/NULL) — character
55	19	37	AFSP FEL EXMP, this field indicates the notification status of an AFSP Record of Completion letter in a preparer's secure mailbox. (U/R/A/Null) — character U -- UnRead R -- Read A -- Archived Null -- does not have AFSP record
56	19	78	PREPARER OPT OUT PREPARER DIRECTORY, Self-reported response indicating whether or not the preparer has elected for their information to be included within or excluded from the preparer directory
57	20	17	The registration method associated with a preparers registration (P/O) — character
58	20	36	The renewal method associated with a preparers most recent renewal (P/O/NULL) — character
59	21	21-23	Credit hours for the "Federal Tax Law" continuing education category — character
59	21	45-47	Credit hours for the "Federal Tax Law Updates" continuing education category — character
60	22	21-23	Credit hours for the "Tax-Related Ethics" continuing education category — character
61	23	19-28	Reactivation Date — character
62	23	51-60	Status Change Date — character
63	24	1-79	ERROR MESSAGE IF THE SYSTEM COMES ACROSS ANY ISSUES.