

IRS Tax Transcript Request Process

New for 2012-2013: Students/parents who did not or were not able to use the IRS Data Retrieval tool on the FAFSA, must provide an IRS Tax Transcript if the FAFSA was selected for verification by the Federal processor or the school.

If you amended your tax return, you must notify the Office of Student Financial Aid and you must also request both the IRS Tax Transcript and the IRS Tax Account Transcript.

Tax filers can request a transcript of their 2011 tax return from the IRS in one of three ways. There is no cost associated with requesting a tax transcript.

Online Request

- Available on the IRS Web site at www.irs.gov
- In the **Tools** section of the homepage click “Order a Tax Return or Account Transcript”
- Click “Order a Transcript”
- Enter the tax filer’s social security number, date of birth, street address, and zip or postal code. Use the address currently on file with the IRS. Generally this will be the address that was listed on the latest tax return filed. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- Click “Continue”
- In the **Type of Transcript** field, select “Return Transcript”* and in the **Tax Year** field, select “2011”.

*Filers who amended their tax return must also request an IRS tax account transcript.

- If successfully validated, tax filers can expect to receive a paper IRS Tax Transcript within 5 to 10 days from the time the on-line request was successfully transmitted to the IRS.
- IRS Tax Transcripts requested online cannot be sent directly to a third party by the IRS.

Telephone Request

- Available from the IRS by calling 1-800-908-9946.
- Tax filers must follow prompts to enter their social security number and the numbers in their street address. Generally this will be numbers of the street address that was listed on the latest tax return filed. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- Select “**Option 2**” to request an IRS Tax Return Transcript and then enter “**2011**”. Filers who amended their tax return: Select “option 4” to request both an IRS Tax Transcript and an IRS Tax Account Transcript.
- If successfully validated, tax filers can expect to receive a paper IRS Tax Transcript within 5 to 10 days from the time the IRS receives the request.
- IRS Tax Transcripts requested by telephone cannot be sent directly to a third party by the IRS.

Paper Request Form – IRS Form 4506T

- IRS Form 4506T may be used to request an IRS Tax Transcript. NOTE: Do not confuse with Form 4506 which is used to request an original copy of the tax return and requires a \$57 fee for processing.
- Download at <http://www.irs.gov/pub/irs-pdf/f4506.pdf>
- Complete lines 1–4, following the instructions on page 2 of the form. Note that line 3 should be the most current address as filed with the IRS. It is the address where the IRS Tax Transcript will be sent. If the address has recently changed, include the address listed on the latest tax return filed on Line 4. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- Line 5 provides tax filers with the option to have their IRS Tax Transcript mailed directly to a third party by the IRS.

Incoming tax transcripts mailed directly to Goucher may be difficult to match with the student’s financial aid application, particularly if the two names differ. For this reason, do not have the Tax Transcript mailed directly to Goucher. When you receive the Tax Transcript, clearly write the name of your student on the top of the transcript before mailing, faxing or sending by email to Goucher’s financial aid office.

- On line 6, enter “2011” to receive IRS tax information for the 2011 tax year that is required for the 2012-2013 FAFSA. Check box 6a, on the right, to request Return Transcript.

- Filers who amended their tax return must also check box 6b, on the right, to request an Account Transcript
- The tax filers (or spouse if requesting information from a joint tax return) must sign and date the form and enter their telephone number. Only one signature is required to request a transcript for a joint return.
- Mail or fax the completed IRS Form 4506T to the appropriate address (or fax number) provided on page 2 of Form 4506T.
- Tax filers can expect to receive their transcript within 5 to 10 days from the time the IRS receives and processes their signed request. NOTE: Processing form 4506T means verifying/validating the information provided on the form. If any information does not match the IRS records, the IRS will notify the tax filer that it was not able to provide the transcript.
- Non-tax filers required to verify that they did not file a tax return may use Form 4506T and check box 7. Current year requests are available after June 15th.