



**Q #1: How do I request a tax return transcript?**

There are three ways to request an IRS Tax Transcript:

1. Online (step-by-step instructions follow)
2. By telephone at 1-800-908-9946
3. US Mail or Fax by filing the paper Form 4506T or Form 4506-EZ.

**Q #2: What the steps to request a transcript online?**

1. Go to <https://sa2.www4.irs.gov/irfof-tra/start.do> (Screenshot 1)
2. Hit “OK” to the “U.S. Government System is for authorized use only!” pop-up box.
3. Complete the “Order a Transcript” form (Screenshot 1):

- **Social Security Number (SSN)** or Individual Tax ID Number (ITIN)
  - ITINs are issued to individuals who are required to have a U.S. taxpayer identification number but who do not have, and are not eligible to obtain a Social Security Number (SSN) from the Social Security Administration (SSA).
- **Date of Birth** (day, month, 4 digit year)
- **Street Address**
  - Use the address currently on file with the IRS. Generally this will be that address listed on the latest tax return you filed. However, if you've updated your address with the US Postal Service, the IRS should have the updated address.
- **Zip Code**
  - If you live in a country that has no postal code you will not be able to order transcripts online. Contact the IRS at 1-800-829-1040 or outside the US at 267-941-1000 to order a transcript.

Screenshot 1

4. Select the **Return Transcript** for the **Type of Transcript** needed and hit continue (Screenshot 2)

- **Amended Tax Returns** – For students and/or parents that filed an amended return, you must submit a copy of your Tax Return Transcript and a copy of the Form 1040-X.
- **Account Transcript** – An Account Transcript should only be requested if it is specifically asked for by the Financial Aid Office.

Screenshot 2

5. Select the **Tax Year** and hit continue (Screenshot 3).

- For the 2013-14 school year, Buffalo State needs the 2012 Return transcript, unless otherwise is specified.

6. If the IRS is able to make a successful match based on the information entered, the transcript will be delivered to via the US mail in 5-10 days from the time the online request was successfully transmitted. If the IRS cannot match the information, see question #3.

- a. Note that the IRS cannot send online submissions directly to Buffalo State.

Screenshot 3

***Q #3: When I submitted the online form the IRS said the tax return transcript was unavailable. What should I do?***

There is a processing delay between when taxes are filed and when the tax transcripts can be ordered. Review the statements below to ensure you have waited the appropriate length of time and that you do not owe taxes. If none of the below conditions apply to you, you will need to call the IRS to request the transcript and/or troubleshoot.

- ✓ Electronic tax return submissions take about 2 weeks before they are available to request a tax transcript.
- ✓ Paper tax return submissions take about 6-8 weeks.
- ✓ If you owe money to the IRS (not due a refund), there is a known processing delay by the IRS. Pay your tax liability as soon as possible and then request a tax transcript. The IRS has indicated that tax returns for tax filers that owe a balance will not have a transcript available until May or later.
- ✓ Verify you have entered the information correctly on the online form
- ✓ If none of the options above apply, call the IRS.

***Q #4: What is the difference between a tax return transcript and a Tax Account Transcript?***

- ✓ **Tax Return Transcript** - A tax return transcript shows most line items from your tax return (Form 1040, 1040A, or 1040EZ) as it was originally filed, including any accompanying forms and schedules. It does not reflect any changes you, your representative, or the IRS made after the return was filed. In many cases, a return transcript will meet the requirements of lending institutions such as those offering mortgages and for applying for student loans.
- ✓ **Tax Account Transcript** - A tax account transcript shows any payments and any later adjustments either you or the IRS made after the tax return was filed. This transcript shows basic data, including marital status, type of return filed, adjusted gross income and taxable income.

***Q #5: Can I request multiple IRS tax transcripts?***

It is recommended that you request one (1) transcript and make several copies.

***Q #6: My current address is different than my 2012 tax return address. What should I do?***

Since the online submission sends the tax return transcript to the address on the tax return, you need to use Form 4506T or Form 4506-EZ or call the IRS to request your tax return transcript. You cannot use the online form.

***Q #7: I rolled over an IRA and it is showing on the FAFSA as untaxed income. How do I correct this since the IRS Data Retrieval is incorrect?***

Submit a copy of your 1099-R to the Financial Aid Office which shows that the money was, in fact, rolled over.

***Q #8: I filed a joint (married) tax return but now I'm separated. What do I submit?***

You must submit the tax transcript and all W-2 statements (both parties) for the year indicated. The Financial Aid Office can subsequently adjust the FAFSA to include only the pertinent income (student and custodial parent). Note that proof of separate residence will also be required (utility bills, signed leases, etc.).

***Q #9: I was single when I filed taxes but I am married now. What do I submit?***

You must submit your tax return transcript and your spouse's tax transcript, as well as W-2 statements for both parties.

***Q #10: I filed an amended tax return. What do I need to submit?***

You must submit a signed copy of the Form 1040-X that was sent to the IRS and your Tax Return Transcript.

***Q #11: My tax return has an "official" IRS stamp on it. Do I still need to request a transcript?***

An IRS tax return that has an "official" stamp by the IRS is not a substitute for an IRS Tax Return Transcript. You must still request and submit the IRS tax return transcript.

***Q #12: I am the victim of identity theft and cannot obtain a transcript from the IRS. What should I do?***

Victims of Identity Theft may submit a signed copy of their Form 1040, 1040A or 1040 EZ and one of the following: IRS Form 14039 (Identity Theft Affidavit); A Signed/Dated statement that you are the victim of identity theft and that the IRS is investigating the issue; or A copy of the police report filed by the tax filer.

## Approximate Wait Time to Request an IRS Tax Return Transcript and/or Use the IRS Data Retrieval Tool (DRT)

When a tax return filer who...	Return Filed Electronically	Paper Tax Return Filed
<b>Has no amount owed or has an expected refund</b> at the time the tax return is filed	Generally tax returns are accepted by the IRS within a day or two of the return having been electronically filed with the IRS. In most cases, the IRS DRT is available within two–three weeks after the return has been accepted by the IRS.	Generally tax returns are accepted by the IRS when the tax return is received by the IRS. In most cases, the IRS DRT is available within eight–11 weeks after the tax return has been accepted by the IRS.
<b>Has an amount owed and makes a full payment</b> on that amount at the time the tax return is filed.	Generally tax returns are accepted by the IRS within a day or two of the return having been electronically filed with the IRS. In most cases, the IRS DRT is available within two–three weeks after the return has been accepted by the IRS.	IRS will process the tax return in June. In most cases, the IRS DRT is available within two–three weeks after the tax return has been processed by the IRS.
<b>Has an amount owed and subsequent to submitting their tax return to the IRS, pays the full amount due</b>	Generally tax returns are accepted by the IRS within a day or two of the return having been electronically filed with the IRS. In most cases, the IRS DRT is available within three–four weeks after full payment is made.	IRS will process the tax return in June. In most cases, the IRS DRT is available within two–three weeks after the tax return has been processed by the IRS.
<b>Has an amount owed and has not paid in full the amount due</b> at the time the tax return is filed.	Generally tax returns are accepted by the IRS within a day or two of the return having been electronically filed with the IRS. However, IRS will not process the return until May. In most cases, the IRS DRT is available within two–three weeks after the return has been processed in May.	IRS will process the tax return in June. In most cases, the IRS DRT is available within two–three weeks after the tax return has been processed by the IRS.