

## Nazareth College 2012 IRS Tax Return Transcript Request Instructions

Particular tax filing statuses will prevent a federal student aid applicant, and/or his parents, from utilizing the IRS Data Retrieval Tool. An applicant is unable to use the IRS Data Retrieval Tool if:

- A married independent applicant and spouse filed separate tax returns
- The married parents of a dependent student filed separate tax returns
- The parent of a dependent child filed as Head of Household
- The applicant or parents filed an amended tax return – provide both of the following:
  - *A signed copy of the original 2012 income tax return that was filed with the IRS or a 2012 IRS Tax Transcript (signature not required), and*
  - *A signed copy of the 2012 IRS form 1040X, “Amended U.S. Individual Income Tax Return” that was filed with the IRS.*
- The applicant or parents filed a Puerto Rican or foreign tax return
- An applicant or applicant’s parent had a change in marital status after the end of the tax year(12/31/2011)
- The applicant (or the parent of a dependent student) did not use the IRS Data Retrieval Tool- either on the initial FAFSA or through the FAFSA correction process
- Information included on the FAFSA using the IRS Data Retrieval was changed after being imported from the IRS.
- The applicant or parents recently filed their taxes; taxes must have been filed at least two weeks prior to using IRS Data Retrieval

In the event that a federal student aid applicant, or his parents, are unable to utilize the IRS Data Retrieval Tool to verify their 2012 IRS tax information, a 2012 Tax Return Transcript ***must be*** requested, free of charge, from the IRS. This request may be done in one of three ways.

### Online Request

- Available on the IRS Web site at [www.irs.gov](http://www.irs.gov)
- In the **Online Services** 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 “2012”.
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request, within 5 to 10 days from the time the on-line request was successfully transmitted to the IRS.
- IRS Tax Return 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 “**2012**”.
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request, within 5 to 10 days from the time the IRS receives the request.
- IRS Tax Return Transcripts requested by telephone cannot be sent directly to a third party by the IRS.

#### Paper Request Form – IRS Form 4506T-EZ

- IRS Form 4506T-EZ should be used instead of IRS Form 4506-T because it is sufficient to request an IRS Tax Return Transcript.
- Download at <http://www.irs.gov/pub/irs-pdf/f4506tez.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 Return 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 Return Transcript mailed directly to a third party by the IRS.

Institutions are responsible for notifying aid applicants whether to list the institution as the third party to receive the Transcript or not. Some institutions may have difficulty matching a parent's incoming IRS Tax Return Transcript to the aid applicant, as the two names may be different.

- On line 6, enter "2012" to receive IRS tax information for the 2012 tax year that is required for the 2012-2013 FAFSA.
- 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-EZ to the appropriate address (or FAX number) provided on page 2 of Form 4506T-EZ.
- 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-EZ 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.