



TAX RETURN TRANSCRIPT FAQs

Is There Another Option Available Other Than Ordering Tax Return Transcripts?

If you chose not to use the IRS Data Retrieval Tool, but are eligible to use it, you can log back into your FAFSA and use the Data Retrieval Tool rather than submit a Tax Return Transcript. This process will allow you to have your family's income information automatically transferred from the IRS's website directly into your FAFSA. It will save you time!

PLEASE NOTE: If any of the following conditions exist, the IRS Data Retrieval Tool will not be available:

- The student or parent did not indicate on the FAFSA that the tax return has been completed.
- The marriage date is January 2018 or later.
- The first three digits of the SSN are 666.
- The student or parent filed a non-U.S. tax return.
- The student or parent is married and filed the tax return either as head of household or married but filing a separate return.
- Neither married parent entered a valid SSN.
- A non-married parent or both married parents entered all zeroes for the SSN.

How Do I Know if I Need to Order Tax Return Transcripts?

You will need to order a free tax return transcript for any of the following reasons:

- You were selected for verification, used the IRS Data Retrieval Tool, and changed the imported data on the FAFSA, or
- You were selected for verification and could not or did not use the IRS Data Retrieval Tool.

How Do I Order my Tax Return Transcripts?

There are a three ways to request a tax return transcript:

Online – Get Transcript at www.irs.gov,

With online requests, tax filers can get an electronic transcript or they can have the IRS mail them a paper transcript, which is how non-online requests are handled. The Get Transcript Online feature allows users to get the transcript in real time as a Portable Document Format (PDF) file, which they can submit electronically to a school or print and submit as a hard copy. To use the Get Transcript Online tool, users must have (1) access to a valid email address, (2) a text-enabled mobile phone in their name, and (3) specific financial account numbers, such as a credit card number or an account number for a home mortgage or auto loan. The process will not cause charges to the card or the account.

Call the IRS at 1-800-908-9946

Phone requests are via an automated process instead of an IRS representative.

Mail or Fax the paper Form 4506T-EZ, which can be printed out from the IRS website.

To order a fiscal year tax return transcript for verification, Form 4506-T must be used rather than Form 4506T-EZ. Only filers who submit a paper 4506-T or 4506T-EZ can choose to have the transcript mailed to a third party. Schools can accept and copy transcripts originally obtained from the IRS.

Phone: 610.917.1475 • **Fax:** 610.917.2069 • **Email:** financialservices@valleyforge.edu



I'm Having Issues with Ordering My Tax Return Transcript Online. What Now?

If you get locked-out or need help, the IRS.gov Website Help Desk can be reached toll-free at 800.876.1715, Monday - Friday 8 am - 8 pm (Eastern Time).

When Can I Order my Tax Return Transcripts?

The timing of when you can successfully request a copy of your Tax Return Transcripts depends on if you owe taxes at the time of filing, and if you filed electronically or by paper. Electronic Filing 2-3 weeks after submission in most cases Paper Filing 8-11 weeks after submission in most cases.

Who Can Order the Tax Return Transcripts?

The primary and secondary taxpayer on the tax return transcript are eligible to order the tax return transcript.

How Much Does it Cost?

It is free to order or view a tax return transcript.

Is the Tax Account Transcript Acceptable?

While ordering, you may notice the option to request a tax account transcript. Please note that this will not satisfy the requirement. You must order a tax return transcript.

Can I Send a Copy of my Tax Returns?

The U.S. Department of Education no longer accepts a tax return for verification purposes.

I Filed Amended Tax Returns. What do I do?

If you filed an amended tax return, you will need to submit a Tax Return Transcript or complete IRS Data Retrieval, AND a signed copy of your IRS Form 1040X.

Can I use Get Transcript if I'm a victim of Identity Theft?

Yes, you can still access Get Transcript online or by mail. If the IRS is unable to process your request due to identity theft, you'll receive an online message or if using the mail option, a letter will be mailed to you that provides specific instructions to request a transcript.