IRS TAX TRANSCRIPT GUIDE

Not eligible for the IRS Data Retrieval Tool? The IRS Transcript request is fast, easy, convenient, and secure!

Request Your Tax Return Transcript Online


2. Select “Get Transcript by MAIL”.

Tips.

- You will not be able to request a tax transcript if you filed an amended return (form 1040X) or are a victim of identity theft.

- If you’ve used the Transcript tool previously, you can log in without creating a new ID.
Fill out your personal information.

Once your personal information is completed you'll be prompted to select options for your transcript. Select “Return Transcript” (not “Tax Account Transcript”) and select the tax year.

You're done! If successfully validated, you can expect your tax transcript to be mailed to the address listed on the tax return about 5 to 10 days from the time the request was successfully transmitted to the IRS.

Tips

- Have your taxes in front of you and enter the name and address carefully as it is on the return.
- For a joint tax return, use the primary filer’s social security number, date of birth, street address, and zip or postal code.
- Enter the address that was listed on the latest tax return filed. If an address change has been completed through the IRS or the US Portal Service, the IRS may have the updated address on file which should be used.
- If you entered your address as it appears on your tax return and it doesn’t work, try using the standardized version of your address. Go to www.usps.com to find your address.
- If you have problems, the IRS Website Help Desk can be reached toll-free at 1-800-876-1715, M-F 8 a.m to 8 p.m (Eastern Time).
- You order a tax transcript by phone by calling 1-800-908-9946.
- You may also order a tax return for free by paper—IRS Form 4560-T, visit www.irs.gov/
Once you receive your tax transcript make a copy of your IRS tax transcript and keep the original for your records.

Submit the copy of the IRS tax transcript to the Office of Student Financial Aid using one of the methods listed below. Make sure to include the student’s name and UID number on the copy of your IRS tax transcript.

Contact Us

University of Maryland
Office of Student Financial Aid
0102 Lee Building
College Park, MD 20742

◊ Phone: 301.314.9000
◊ Fax: 301.405.9265
◊ sfaoper@umd.edu
<table>
<thead>
<tr>
<th>When a tax filer who...</th>
<th>If filed electronically...</th>
<th>If filed by paper...</th>
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<tbody>
<tr>
<td>At the time their tax return was submitted to the IRS, <strong>has no amount owed or has an expected refund</strong></td>
<td>Generally returns are accepted by the IRS within a day or two of the return having been electronically filed.</td>
<td>Generally, returns are accepted by the IRS when the tax return is received.</td>
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<td></td>
<td>In most cases, Data Retrieval is available and a Tax Return Transcript may be requested <strong>within 2 – 3 weeks</strong> after the return has been accepted by the IRS.</td>
<td>In most cases, Data Retrieval is available and a Tax Return Transcript may be requested <strong>within 8 – 11 weeks</strong> after the return has been accepted by the IRS.</td>
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<tr>
<td>At the time their tax return was submitted to the IRS, <strong>has an amount owed AND makes a full payment on that amount</strong></td>
<td>Generally returns are accepted by the IRS within a day or two of the return having been electronically filed.</td>
<td>IRS will process the tax return in June.</td>
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<td>In most cases, Data Retrieval is available and a Tax Return Transcript may be requested <strong>within 2 – 3 weeks</strong> after the return has been accepted by the IRS.</td>
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<tr>
<td>Has an amount owed and subsequent to submitting their tax return to the IRS, pays the full amount due</td>
<td>Generally returns are accepted by the IRS within a day or two of the return having been electronically filed.</td>
<td>IRS will process the tax return in June.</td>
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<td>In most cases, Data Retrieval is available and a Tax Return Transcript may be requested <strong>within 3 - 4 weeks</strong> after the full payment is made.</td>
<td>In most cases, Data Retrieval is available and a Tax Return Transcript may be requested <strong>within 2 - 3 weeks</strong> after the return has been processed by the IRS.</td>
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<tr>
<td>At the time their tax return was submitted to the IRS, <strong>has an amount owed and has not paid in full</strong></td>
<td>Generally returns are accepted by the IRS within a day or two of the return having been electronically filed.</td>
<td>IRS will process the tax return in June.</td>
</tr>
<tr>
<td></td>
<td>However, <strong>the IRS will not process the return until May</strong>.</td>
<td>In most cases, Data Retrieval is available and a Tax Return Transcript may be requested <strong>within 2 - 3 weeks</strong> after the return has been processed by the IRS.</td>
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**If requested via IRS2Go App or 1-800 number:** 5 – 10 business days via post mail after the request is submitted  
**If requested by 4506-T or 4506T-EZ:** 30 calendar days via post mail from the time the IRS receives the signed request