



Obtaining Tax Transcripts Spring 2016

Presented by Mila Tappan



- Updating Income Information on the FAFSA
- When Do Tax Transcripts Become Available?
- Obtaining Tax Transcripts

Updating FAFSA Income Information

- Applicants should file their FAFSAs early using estimated income information:
 - Meeting school priority deadlines is critical!
 - Applicants must go back to fafsa.gov to update income and tax information after taxes have been filed.

- Using the IRS Data Retrieval Tool (DRT) is strongly recommended.
 - For information on IRS DRT, visit FAMEmaine.com in the Filing the FAFSA section for information and a link to our “IRS Data Retrieval” webinar.

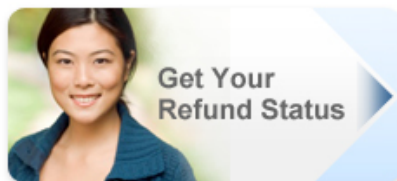
- If IRS DRT cannot be used, schools may required some students (specifically those selected for verification) to submit tax transcript(s).

When Do Tax Transcripts Become Available?

- It takes two to three weeks for a tax transcript to become available if you filed your tax return electronically and eight to 11 weeks for paper IRS tax filers.

- These timeframes apply to those who:
 - are receiving a refund;
 - do not owe money; or
 - paid the full amount due at the time the return was filed.

- For all others, the timeframes will be longer.



Forms and Pubs

- › 1040
- › 1040EZ
- › W-4
- › W-9
- › 1099-MISC
- › More ...
- › Pub 15
- › Pub 17
- › 8962
- › Tax Table
- › Find Forms

Hot Topics

- › Get Free Tax Preparation Help
- › Electronic Filing Options
- › Free File Tax Software
- › Make a No-Fee Electronic Payment
- › Affordable Care Act
- › More ...

Tools

- › Find Answers to Your Tax Questions
- › Request an Electronic Filing PIN
- › Get a Tax Transcript
- › Apply for an Employer ID Number
- › Renew or Obtain a PTIN for 2016
- › More ...

Filing & Payment



News

- What to Expect for Refunds in 2016
- Consumer Alert: Recent Surge in Phishing Schemes
- Taxpayer Bill of Rights: #5, The Right to Appeal
- Earned Income Tax Credit (EITC)
- › More

Free File | Phishing & Tax Scams | 2016 Filing Season | Protect Your ID | **Health Care and Taxes**



Did you receive a Form 1095-A, -B or -C?
Find out why you received, and what to do with, these new health care forms.

Marketplace offers special enrollment period
Taxpayers who failed to file and reconcile may qualify for a special enrollment period.

Questions and answers about health care information forms for individuals
Find out who should expect to receive them.

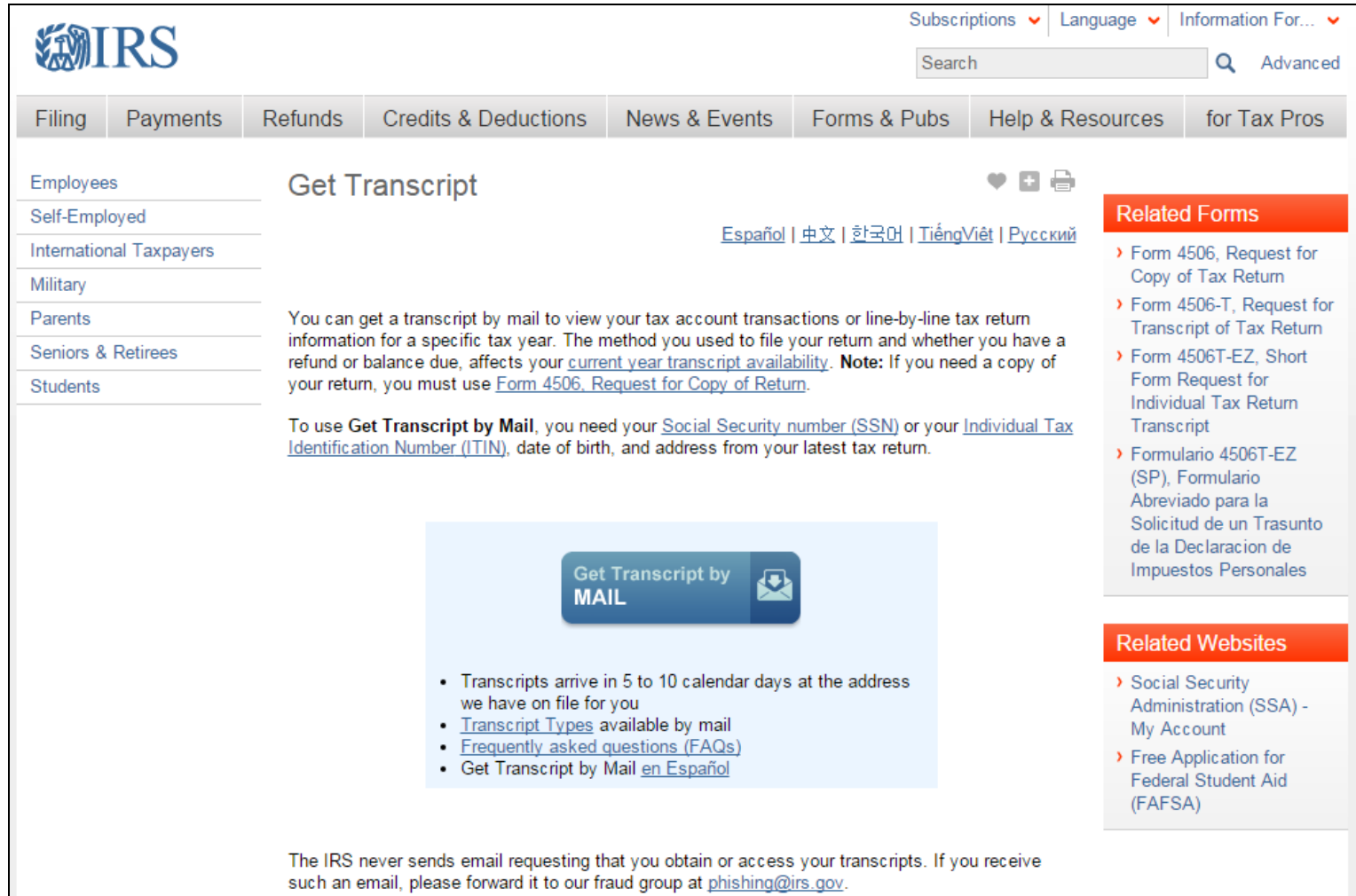
Social Media



IRS2Go Mobile App (ASL)



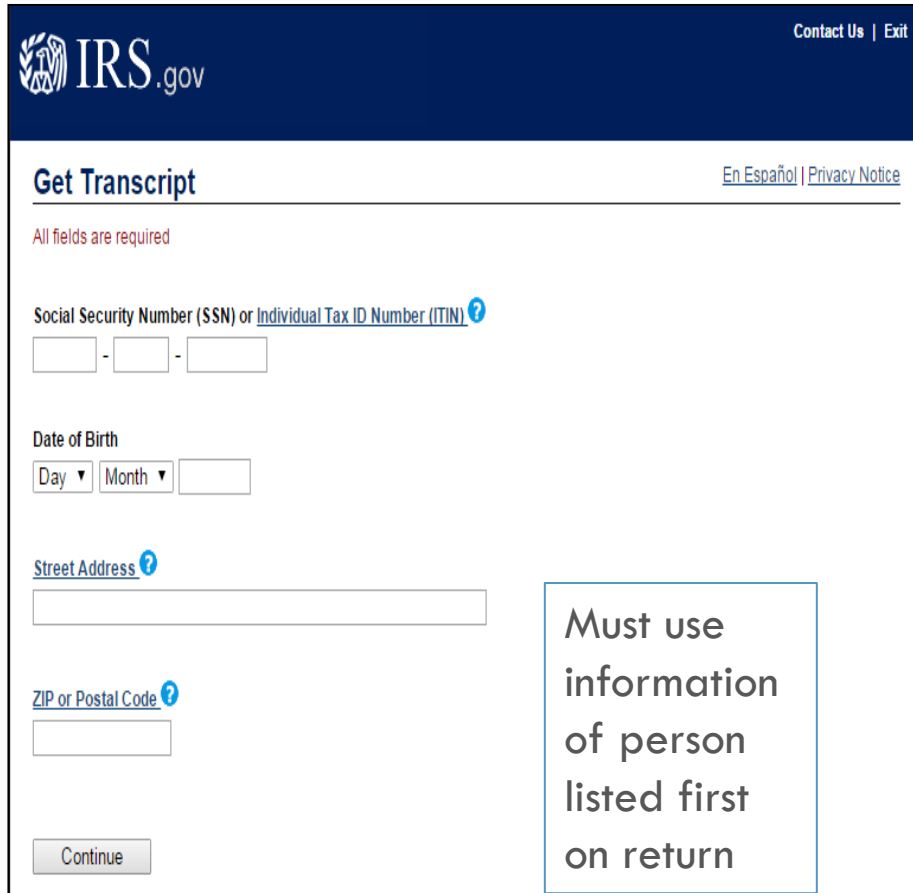
Obtaining a Tax Transcript



The screenshot shows the IRS website's 'Get Transcript' page. At the top, there are navigation links for Subscriptions, Language, and Information For... A search bar is present with the text 'Search' and 'Advanced'. Below the search bar is a horizontal menu with categories: Filing, Payments, Refunds, Credits & Deductions, News & Events, Forms & Pubs, Help & Resources, and for Tax Pros. On the left side, there is a vertical menu with categories: Employees, Self-Employed, International Taxpayers, Military, Parents, Seniors & Retirees, and Students. The main heading is 'Get Transcript' with social media icons (heart, plus, print) to its right. Below the heading are language options: [Español](#) | [中文](#) | [한국어](#) | [TiếngViết](#) | [Русский](#). The main text explains that transcripts can be obtained by mail to view tax account transactions or line-by-line tax return information for a specific tax year. It notes that the filing method affects transcript availability and provides a link to [Form 4506, Request for Copy of Return](#). A 'Note' states that if a copy is needed, Form 4506 must be used. A section titled 'To use Get Transcript by Mail' lists required information: Social Security number (SSN), Individual Tax Identification Number (ITIN), date of birth, and address from the latest tax return. A blue button labeled 'Get Transcript by MAIL' with an envelope icon is shown. Below the button, a list of links includes: 'Transcripts arrive in 5 to 10 calendar days at the address we have on file for you', '[Transcript Types](#) available by mail', '[Frequently asked questions \(FAQs\)](#)', and 'Get Transcript by Mail [en Español](#)'. On the right side, there are two red-bordered boxes: 'Related Forms' listing Form 4506, Form 4506-T, Form 4506T-EZ, and Formulario 4506T-EZ (SP); and 'Related Websites' listing Social Security Administration (SSA) - My Account and Free Application for Federal Student Aid (FAFSA). At the bottom, a disclaimer states: 'The IRS never sends email requesting that you obtain or access your transcripts. If you receive such an email, please forward it to our fraud group at phishing@irs.gov'.



Ordering a Transcript




IRS.gov [Contact Us](#) | [Exit](#)

Get Transcript

[En Español](#) | [Privacy Notice](#)


All fields are required


Social Security Number (SSN) or [Individual Tax ID Number \(ITIN\)](#) 

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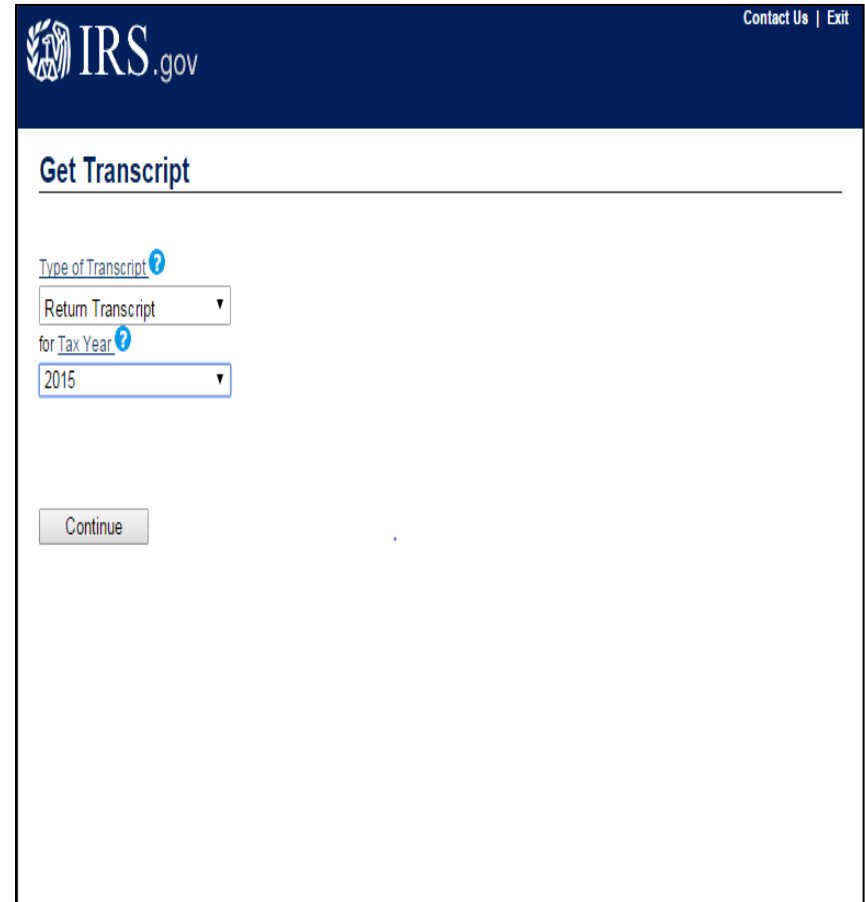
Date of Birth

Day Month

[Street Address](#) 


[ZIP or Postal Code](#) 


Must use
information
of person
listed first
on return



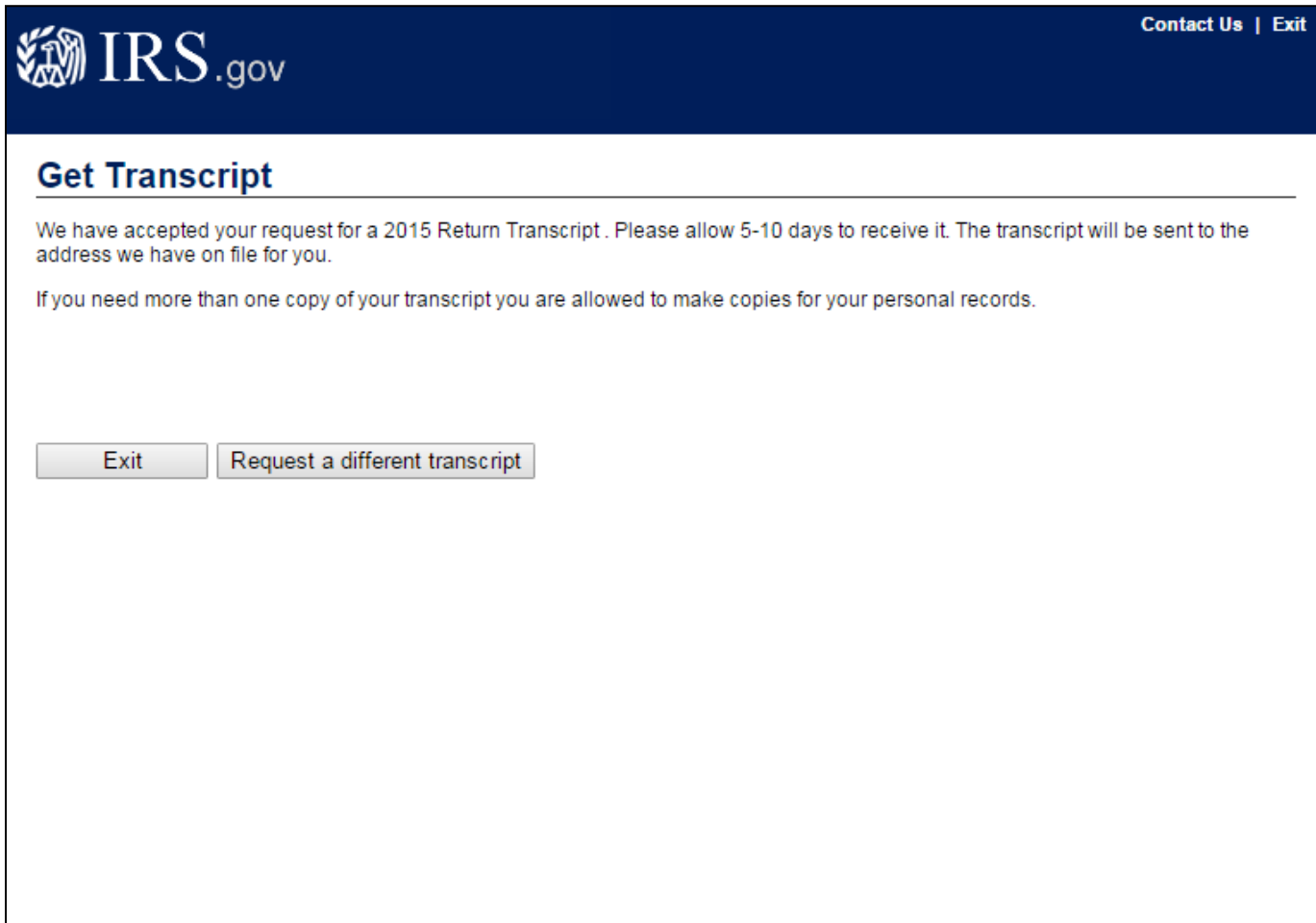
IRS.gov [Contact Us](#) | [Exit](#)

Get Transcript

[Type of Transcript](#) 

for [Tax Year](#) 

Ordering a Transcript



The screenshot shows the IRS.gov website interface. At the top left is the IRS logo and 'IRS.gov'. At the top right are links for 'Contact Us' and 'Exit'. The main heading is 'Get Transcript'. Below it, a message states: 'We have accepted your request for a 2015 Return Transcript. Please allow 5-10 days to receive it. The transcript will be sent to the address we have on file for you.' A second message says: 'If you need more than one copy of your transcript you are allowed to make copies for your personal records.' At the bottom of the content area are two buttons: 'Exit' and 'Request a different transcript'.

- If selected for verification, the student will still need to complete additional paperwork and/or provide further documentation.
- It is critical that students pay attention to all communication from the school(s).
 - Notifications may come via paper letter or email notification – varies by school.
 - Respond quickly – many schools have verification deadlines.

Closing Thoughts.....

- Don't be afraid to ask questions of the financial aid office!
- We're here to help, too!
 - Visit our website to find more information about the complete FAFSA process:
FAMEmaine.com - in the *Filing the FAFSA* section.



Thank you!

Finance Authority of Maine

5 Community Drive

P.O. Box 949

Augusta, ME 04332

1-800-228-3734

TTY: 207-626-2717

education@FAMEmaine.com

FAMEmaine.com

