



## Lander University Financial Aid Office

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### Tax Transcript Tip Sheet

- The address entered when attempting the IRS Data Retrieval must match the address on the tax return. For example, if the address was in all caps or if part of the address was abbreviated.
- The filing status must match the tax return. Did your parent file Married, Filing Jointly or Married, Filing Separately?
- It is helpful to have a copy of the first page of your tax return and your parent's tax return in front of you when trying to complete the IRS Data Retrieval Tool on the FAFSA website.
- It is wise to double check address at USPS website to see if the postal service has it entered differently. If they do, you should try entering the address as the USPS has it listed: [https://tools.usps.com/go/ZipLookupAction\\_input](https://tools.usps.com/go/ZipLookupAction_input)
- Complete and fax a Form 4506-T to the IRS and wait 5-10 days to see if a TRT is sent to the address that you have listed on the form: <https://www.irs.gov/uac/about-form-4506t-ez>
- Some success speaking to IRS through the following steps:
  1. Call 1-800-829-1040; press 1 for English; then follow the prompts by pressing the below numbers.
  2. Press 2;
  3. Press 1;
  4. Press 4;
  5. Press 2;
  6. Enter SSN; wait for the system to verify the SSN; then press 1 when prompted.
  7. Press 5 for a detailed review of the account. It may ask for the PIN created for the account. Do not enter anything and it will force the system to tell you to wait for a representative.
- Identity Theft from the IRS may also be the issue. One reason you may not be able to match the address is that thieves updated the address at the time they asked for a tax transcript so that the data was sent to them. You can check with the IRS and see if the data was sent elsewhere which would indicate they were a victim but at least the IRS has a course of action for those cases.
- Review any correspondence you may have received from the IRS. The correspondence received from the IRS may show an address change by the IRS. The IRS may change Street to ST and Road to RD when processing the return.