

## TIPS FOR REQUESTING IRS ACCOUNT TRANSCRIPTS

### GENERAL HELP:

1. Form 4506-T is available on the IRS website for use in obtaining your transcripts.
2. Do **NOT** request that the transcripts be sent to the IGB by the IRS. You should obtain them directly and subsequently submit them to the IGB.
3. You must complete a **separate** form 4506-T for each type of transcript requested (i.e. forms 940, 941, 1040, 1041, 1065, 1120, etc.).
4. For payroll tax returns, individual & trust tax returns (forms 940, 941, 1040, 1041), be sure that you **check Box 6B** on form 4506-T for 'Account' transcripts to obtain the correct type of transcripts needed by the IGB. For partnership and corporation tax returns (forms 1065 and the 1120 series) **check Box 6C** to obtain a 'Record of Account' transcript.
5. Please read the form 4506-T instructions carefully and **complete the form as instructed**. Failure to do so may result in a delay in the receipt of proper transcripts.
6. If you receive a transcript indicating 'No Data Found', please contact the IRS to determine why such response was received. You may need to submit a corrected form 4506-T.
7. Per the IRS, complete transcripts may not be available for 2 to 8 weeks after you file your tax return. It is recommended that you submit your form 4506-T after 2 weeks and continue in your efforts to obtain your transcripts until a response is received from the IRS.
8. If you do not receive your transcripts or a rejection notice within 2 weeks, it is suggested that you call the IRS to follow up on your request.
9. If you receive a rejection notice, review it to determine the reason for the rejection and immediately submit a new/corrected form 4506-T. If the reason for the rejection is not clear, it is suggested that you call the IRS for assistance.
10. If you receive transcripts or an IRS response that indicates that your tax return has not been processed yet, you must submit another form 4506-T in order for the IRS to send you an updated response. Continue in your efforts to obtain transcripts that will reflect that your return has been processed.
11. If you have requested an extension of time to file your tax return, you should continue in your efforts to obtain transcripts that reflect such extension as being filed.
12. There are businesses that will obtain your IRS account transcripts for you for a fee. At your option, you may want to consider locating one of these businesses for assistance.
13. You may want to contact your tax practitioner for assistance in obtaining your IRS account transcripts. They may have additional methods to recommend for obtaining them.
14. **IT IS RECOMMENDED THAT YOU RETAIN ALL DOCUMENTATION OF YOUR EFFORTS TO TIMELY OBTAIN YOUR TRANSCRIPTS.**

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### **FOR INDIVIDUALS:**

1. Individuals can go online to <http://www.irs.gov/Individuals/Get-Transcript> where they can request and instantly print their IRS Account Transcript.
2. If the Get Transcript feature of the IRS website is not available, individuals can request them over the phone at 1-800-908-9946, or they can fax or mail form 4506-T to the appropriate number or location indicated on the form's instructions. Faxing is generally the quicker method to obtain the transcripts. If you mail the form, you may want to consider sending it via certified mail with a return receipt requested.

### **FOR BUSINESSES:**

1. Business entities can request their transcripts using form 4506-T by faxing or mailing the form to the appropriate number or location indicated on the form's instructions. Faxing is generally the quicker method to obtain the transcripts. If you mail the form, you may want to consider sending it via certified mail with a return receipt requested.
2. Business entities may also try calling 1-800-829-1040. Some business entities have been successful at getting transcripts faxed to them the same day.