

**IRS****News Release****Media Relations Office****Washington, D.C.****Tel. 202.622.4000****For Release: 3/22/01****Release No: IR-2001-37****EXTENSIONS AVAILABLE BY PHONE OR COMPUTER -- WITH OR WITHOUT PAYMENT**

WASHINGTON – People who need more time to complete their forms will find it easy to extend their filing deadline -- they don't need an excuse, or even a stamp. Automatic four-month extensions are now available by phone or by computer, as well as through the paper Form 4868. Those getting extensions may also pay any projected tax due electronically, although payment is not required to obtain an extension. Taxpayers must make their requests by the normal filing deadline. The IRS expects eight million extension requests this year.

The IRS will open a special toll-free phone line for extension requests on April 1. The number is 1-888-796-1074. Callers should use Form 4868 as a worksheet to prepare for the call and have a copy of their 1999 tax return. They will need to enter the adjusted gross income and total tax amounts from that return to verify their identity.

The system gives the caller a confirmation number to signify that the extension request has been accepted. Users should put this confirmation number on their copy of Form 4868 and keep it for their records. They should not send the form to the IRS. Taxpayers calling the extension line can choose to pay any expected balance due by authorizing an automatic withdrawal from a checking or savings account.

Taxpayers may also e-file an extension request using their own tax preparation software or by going to a tax preparer. As with the phone system, computer filers must provide two figures from the previous year's tax return to verify identity.

The third way to get a filing extension is to charge an extension-related payment to an American Express, Discover Card or MasterCard account. The IRS has authorized two companies to process credit card charges for federal taxes. These processors offer the option of extension-related payments through their phone and Web site systems. They also accept credit card charges for the taxes due for 2000 or for estimated taxes for 2001, but these charges do not give an extension of time to file.

There is no IRS fee for credit card payments, but the processors charge a convenience fee. Official Payments Corporation may be reached at 1-800-2PAY-TAX (1-800-272-9829), or at [www.officialpayments.com](http://www.officialpayments.com). PhoneCharge, Inc. may be reached at 1-888-ALLTAXX (1-888-255-8299), or at [www.About1888ALLTAXX.com](http://www.About1888ALLTAXX.com).

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Whether filing an extension request electronically or on paper, the taxpayer must estimate the total tax liability based on the available information. If the IRS later finds this estimate to be unreasonable, the extension will be null and void. The taxpayer will still get credit for any payments made with the extension request.

An extension of time to file does not give more time to pay any taxes owed. A person may choose to pay any projected balance due when requesting an extension, but even without a payment, one can still get the extension.

Taxpayers who live outside the U.S. and Puerto Rico and whose main place of work is outside the U.S. and Puerto Rico already have a filing extension to June 15. This also applies to those in military service outside the country. Taxpayers with this June deadline can file a paper Form 4868 by June 15 to get an additional two months to file. They cannot request this extension by phone or computer. Merely being outside the U.S. on the April deadline does not give a person an extension to June 15.

Interest charges apply to any tax not paid by the regular deadline. The current rate is eight percent a year, compounded daily, and is subject to change each calendar quarter. Taxpayers who request an extension may also be liable for a late payment penalty of 0.5 percent per month if the total tax paid by the regular deadline is less than 90 percent of the actual 2000 tax.

One deadline that taxpayers cannot extend is the date to claim a 1997 refund if they have not yet filed for that year. Unless they had a filing extension in 1998, they must mail such late returns by the April 2001 deadline.

For most of the country, this year's deadline is April 16, because the 15th falls on a Sunday. But for taxpayers in the six New England states and the area of New York State north of Westchester and Rockland Counties, the deadline is April 17. This is because April 16 is Patriots Day, a legal holiday in Massachusetts, the location of the IRS center where these taxpayers send their returns. This extra day applies for requesting extensions, including requests by phone or computer, filing returns and making payments.

Form 4868, "Application for Automatic Extension of Time To File U.S. Individual Income Tax Return," is available from the IRS Web site at [www.irs.gov](http://www.irs.gov). Those with a fax machine may use the IRS TaxFax by calling 703-368-9694 and request Item #13141 by return fax. Form 4868 is also available at local IRS offices and many public libraries. Taxpayers needing this or any other federal tax form should act soon to be sure they have the item in time.

## 2001 FILING SEASON STATISTICS

Cumulative through the week ending 3/17/00 and 3/16/01

	<u>2000</u>	<u>2001</u>	<u>% Change</u>
<b>Individual Income Tax Returns</b>			
Total Receipts	58,708,000	58,251,000	- 0.8
Total Processed	51,733,000	50,439,000	- 2.5
<b>E-filing Receipts:</b>			
TOTAL	26,625,000	29,310,000	10.1
TeleFile (phone)	4,083,000	3,468,000	-15.1
Computer	22,542,000	25,842,000	14.6
Tax Professionals	19,483,000	21,653,000	11.1
Self-prepared	3,059,000	4,189,000	36.9
<b>Refunds Certified by the Martinsburg Computing Center:</b>			
Number	47,300,000	46,286,000	- 2.1
Amount of principal	\$80.632 billion	\$82.899 billion	2.8
Average refund	\$1705	\$1791	5.1
<b>Direct Deposit Refunds:</b>			
Number	21,523,000	24,155,000	12.2
Amount	\$46.398 billion	\$53.019 billion	14.3
Average	\$2156	\$2195	1.8