

## IRS Tax Return Transcript Request Process

Tax filers can request a transcript, free of charge, of their tax return from the IRS in one of the following ways.

### Online Request for Mailed Transcript

- Available on the IRS Web site at [www.irs.gov](http://www.irs.gov)
- In the *Tools* section of the homepage click **“Get a Tax Transcript”**
- Click **“Get Transcript by MAIL”**
- Enter the tax filer’s social security number, date of birth, street address, and zip or postal code. Use the address currently on file with the IRS. Generally this will be the address that was listed on the latest tax return filed. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- Click **“Continue”**
- In the Type of Transcript field, select **“Return Transcript”** and enter the relevant Tax Year (2015 for 2016/2017 Award Year)
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request, within 5 to 10 days from the time the on-line request was successfully transmitted to the IRS.
- IRS Tax Return Transcripts requested online cannot be sent directly to a third party by the IRS.

### Online Request for PDF Transcript and Other Tax Documents

- Available on the IRS Web site at [www.irs.gov](http://www.irs.gov)
- In the *Tools* section of the homepage click **“Get a Tax Transcript”**
- Click **“Get Transcript ONLINE”**
- WHAT YOU NEED TO REGISTER:
  - ✓ ***Your SSN, date of birth, filing status and mailing address from latest tax return,***
  - ✓ ***Access to your email account,***
  - ✓ ***Your personal account number from a credit card, mortgage, home equity loan, home equity line of credit or car loan, and***
  - ✓ ***Your mobile phone with your name on the account.***
- Click ‘Get Started’ if this is your first time accessing your information in this way
  - ✓ Once you click ‘Get Started’ link you will be directed to begin the registration process
- If your registration is successful, you will have access to your tax documents. Be sure to select the tax transcript for the year requested by the financial aid office.

### Telephone Request

- Available from the IRS by calling 1-800-908-9946

- Tax filers must follow prompts to enter their social security number and the numbers in their street address. Generally, this will be numbers of the street address that was listed on the latest tax return filed. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- Select “Option 2” to request an IRS Tax Return Transcript and then enter the appropriate tax year (2015 for 2016/2017 or 2017/2018 Award Year).
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request, within 5 to 10 days from the time the IRS receives the request.
- IRS Tax Return Transcripts requested by telephone cannot be sent directly to a third party by the IRS.

#### Paper Request Form – IRS Form 4506T-EZ

- IRS Form 4506T-EZ should be used instead of IRS Form 4506-T because it is sufficient to request an IRS Tax Return Transcript.
- Download at <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf>
- Complete lines 1 – 4, following the instructions on page 2 of the form. Note that line 3 should be the most current address as filed with the IRS. It is the address where the IRS Tax Return Transcript will be sent. If the address has recently changed, include the address listed on the latest tax return filed on Line 4. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- Line 5 provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS.  
Institutions are responsible for notifying aid applicants whether to list the institution as the third party to receive the Transcript or not. Some institutions may have difficulty matching a parent’s incoming IRS Tax Return Transcript to the aid applicant, as the two names may be different.
- On line 6, enter the relevant tax year “20XX” to receive IRS tax information for the appropriate tax year that is required for the FAFSA filing year.
- The tax filers (or spouse if requesting information from a joint tax return) must sign and date the form and enter their telephone number. Only one signature is required to request a transcript for a joint return.
- Mail or fax the completed IRS Form 4506T-EZ to the appropriate address (or FAX number) provided on page 2 of Form 4506T-EZ.
- Tax filers can expect to receive their transcript within 5 to 10 days from the time the IRS receives and processes their signed request. NOTE: Processing form 4506T-EZ means verifying/validating the information provided on the form. If any information does not match the IRS records, the IRS will notify the tax filer that it was not able to provide the transcript.