

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 three ways.

☆ **If you are unable to complete any of these steps, you will be required to use the IRS Data Retrieval Tool on the FAFSA in order to be awarded financial aid.**

Online Request

- Visit the IRS website at www.irs.gov.
- In the **Tools** section of the homepage click “Order a Return or Account Transcript”.
- Under Step 3, select “Order a Transcript”.
- Click “OK” in the warning message that pops up.
- 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**”. DO NOT request the Account Transcript. In the Tax Return field, select the year you wish to request. Again, please request “**Return Transcript**”.
- 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 Transcripts requested online cannot be sent directly to a third party by the IRS.

Telephone Request

- Available from the IRS by calling 1-800-908-9946 or 1-800-829-1040.
- 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 year you wish to request.
- 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/f4506tex.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 application 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 year to receive IRS tax information for the tax year that is required for the FAFSA.
- 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.