

HOW TO OBTAIN A TAX RETURN TRANSCRIPT FROM THE IRS

The quickest way to resolve the need for a tax return transcript is to go to www.fafsa.gov and use the IRS Data Retrieval Tool (if you are able) to download your tax information directly to the FAFSA. If you did not, or were not able to use the IRS Data Retrieval Tool provided with the online FAFSA application and your FAFSA was selected for verification, you must provide your college with a federal **Tax Return Transcript** (not a copy of your federal tax return).

Tax filers can request from the Internal Revenue Service (IRS) a **Tax Return Transcript** of their **2018** IRS tax return information, free of charge, in a number of ways. Under all methods, when requesting a transcript, tax filers need to provide their Social Security Number (SSN), date of birth, their street address, and ZIP code as is currently on file with the IRS. Generally, this is the address included on the latest tax return filed with the IRS. However, if an address change was made either with the IRS or with the U.S. Postal Service, the IRS may have the updated address on file. If this is the case use the updated address.

For Joint Tax Return filers: When requesting a tax return transcript using one of the electronic processes described below, use the primary tax filer's information (e.g., SSN). When requesting a transcript using one of the two paper processes described in this document, either spouse may submit the request and only one signature is required.

1. Online Request - Get Transcript ONLINE

- Available on the IRS web site at www.irs.gov
- Click "Get Your Tax Record"
- Click "Get Transcript ONLINE."
- The tax filer must sign up to create or reactivate his or her account.
- Follow the prompts to request a transcript.

DO NOT use options 2 or 3 if you are no longer receiving mail at the address on the federal tax return transcript that you are requesting.

2. Online Request - Get Transcript by MAIL

- Available on the IRS web site at www.irs.gov
- Click "Get Your Tax Record"
- Click "Get Transcript by MAIL."
- Acknowledge the disclosure pop up box that appears by clicking "OK."
- Complete the required fields (SSN, DOB etc.) then click "Continue."
- In the **Type of Transcript** field, select "**Return Transcript**", in the Tax Year field, select "**2018**."
- Click "Continue."
 - Leave the "Customer File Number" entry blank if you were not directed/assigned a number by a third-party.
- 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 business days from the time the online request was successfully transmitted to the IRS.
- Note: IRS tax return transcripts requested online cannot be mailed to an address other than the address on file with the IRS.
- **Hint:** May need to format address as on record with www.usps.com

--continued on page 2--

3. 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 or post office box number
- Select “**Option 2**” to request an IRS Tax Return Transcript and then enter “**2018**.”
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their telephone request within 5 to 10 business days from the time the IRS receives the request.
- **Important!** IRS Tax Return Transcripts requested by telephone cannot be mailed to an address other than the address on file with the IRS.
- To speak to IRS customer service 1-800-829-1040

4. Paper Request Form – IRS Form 4506T-EZ, Short Form Request for Individual Tax Return Transcript or IRS Form 4506-T, Request for Transcript of Tax Return

(Use this option to have a tax return transcript mailed to an address not on the original return.)

- Download a PDF <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf> for the EZ form, or
- Download a PDF for the 4506-T at <http://www.irs.gov/pub/irs-pdf/f4506t.pdf>.
- Follow the instructions provided on page 2 of the downloaded form
- Mail or fax the completed IRS Form 4506T-EZ or Form 4506-T (details on page 2 of each form)
- Tax filers can expect to receive their IRS Tax Return Transcript within 10 business days from the time the IRS receives and processes the completed and signed 4506T-EZ or 4506-T request. However, if a third party is identified on line 5, the third party can expect to receive the tax filer's IRS Tax Return Transcript within 10 business days from the time the IRS receives and processes the signed request.
- NOTE: If any information does not match IRS records, the IRS will notify the tax filer that it was not able to provide the transcript.