IRS Tax Return Transcript Request Process

Tax filers can request an IRS Tax **Return** Transcript of their 2013 IRS tax return from the IRS, free of charge, in one of five ways.

Online Request

- Available on the IRS Web site at www.irs.gov.
- In the **Tools** section of the homepage, click "Get Transcript of Your Tax Records"
- Select which method you wish to request your transcript (online or by mail) and follow the instructions. Use the address currently on file with the IRS. Usually, this will be the street address and ZIP Code that was included on your latest tax return. However, if an address change has been completed with either the IRS or the U.S. Postal Service, the IRS may have the updated address on file, which must be used. For a joint tax return, use the first tax filer's information.
- Make sure you request a 2013 "**Return** Transcript" and not an Account Transcript. Account transcripts are not acceptable for financial aid purposes.

IRS2Go App

- Apple Online Store at https://itunes.apple.com/us/app/irs2go/id414113282?mt=8
- Google Play at https://play.google.com/store/apps/details?id=gov.irs

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 included on the latest tax return filed with the IRS by the tax filer. However, if an address change has been completed either directly with the IRS or with the U.S. Postal Service, the IRS may have the updated address on file, which must be used. For a joint tax return, use the primary tax filer's information.
- Select "**Option 2"** to request an IRS Tax Return Transcript and then enter "**2013.**"
- 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.
- IRS Tax Return Transcripts requested by telephone cannot be mailed to an address other than the address on file with the IRS.

Paper Request Form – IRS Form 4506T-EZ

- 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 on file with the IRS. It is the address where the IRS Tax Return Transcript will be sent. Include the address listed on the latest tax return filed on Line 4. However, if an address change has been completed either directly with the IRS or with the U.S. Postal Service, the IRS may have the updated address on file, which must be used. For a joint tax return, use the primary tax filer's information.

- 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 from the IRS. Institutions may have difficulty matching a parent's incoming IRS Tax Return Transcript to the aid applicant, as the last names may be different.

- On line 6, enter "2013" to receive tax information for the 2013 tax year that is required for the 2014-2015 FAFSA.

- The tax filers must sign and date the form and enter their telephone number. Transcripts of jointly filed tax returns may be requested by either spouse. Only one signature is required. Sign the IRS Form 4506T-EZ exactly as your name appeared on the original tax return. If you changed your name prior to submitting your tax return, also sign your current name.

- Mail or fax the completed IRS Form 4506T-EZ to the appropriate address (or FAX number) provided on page 2 of IRS Form 4506T-EZ.

- Tax filers can expect to receive their IRS Tax Return Transcript within 10 business days from the time the IRS receives and processes their signed request. NOTE: Processing IRS Form 4506T-EZ means verifying/validating the information provided on the form. If any information does not match IRS records, the IRS will notify the tax filer that it was not able to provide the transcript.

Paper Request Form – IRS Form 4506-T

- Download at http://www.irs.gov/pub/irs-pdf/f4506t.pdf.

- Complete lines 1 – 4, following the instructions on page 2 of the form. Note that line 3 should be the most current address on file with the IRS. It is the address where the IRS Tax Return Transcript or IRS Record of Account Transcript will be sent. Include the address listed on the latest tax return filed on Line 4. However, if an address change has been completed either directly with the IRS or with the U.S. Postal Service, the IRS may have the updated address on file, which must be used. For a joint tax return, use the primary tax filer's information.

- Line 5 provides tax filers with the option to have their IRS Tax Return Transcript or IRS Record of Account 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 from the IRS. Institutions may have difficulty matching a parent's incoming IRS Tax Return Transcript or IRS Record of Account Transcript to the aid applicant, as the last names may be different.

- On line 6, enter the tax form number that is being requested (1040, 1040A, 1040EZ, etc.) and then check the appropriate box for the transcript being requested. Only one tax form number can be used per request.

- On line 9, enter "12/31/2013" to receive IRS tax information for the 2013 tax year that is required for the 2014-2015 FAFSA.

- The tax filers must sign and date the form and enter their telephone number. Transcripts of jointly filed tax returns may be requested by either spouse. Only one signature is required. Sign the IRS Form 4506-T exactly as your name appeared on the original tax return. If you changed your name after submitting your tax return, also sign your current name.

- Mail or fax the completed IRS Form 4506-T to the appropriate address (or FAX number) provided on page 2 of IRS Form 4506-T.

- Tax filers can expect to receive their IRS Tax Return Transcript within 10 business days or their IRS Record of Account Transcript within 30 calendar days from the time the IRS receives and processes the completed and signed 4506-T request. NOTE: Processing IRS Form 4506-T means verifying/validating the information provided on the form. If any information does not match IRS records, the IRS will notify the tax filer that it was not able to provide the transcript.