IRS Tax Return Transcript, IRS Tax Account Transcript, and IRS Record of Account Request Process

Tax filers can request from the IRS an IRS Tax Return Transcript or an IRS Tax Account Transcript of their 2012 IRS tax return, free of charge, in one of four ways.

Online Request

- Available on the IRS Web site at www.irs.gov
- In the **Tools** section of the homepage click "Order a Return or Account Transcript"

1 Click "Order a Transcript"

2 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 either through the IRS or the US Postal Service, the IRS may have the updated address on file, which should be used. For a joint tax return, use the primary tax filer's social security number, date of birth, street address, and zip or postal code.

- Click "Continue"
- In the **Type of Transcript** field, select "Return Transcript" or "Account Transcript" and in the **Tax Year** field, select "2012".
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript or an IRS Tax Account Transcript, whichever was requested, 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.
- IRS Tax Return Transcripts and IRS Tax Account Transcripts requested online cannot be mailed to an address other than the address on file with the IRS.

Telephone Request

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

3 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 either through the IRS or the US Postal Service, the IRS may have the updated address on file. For a joint tax return, use the primary tax filer's social security number, date of birth, street address, and zip or postal code.

- Select "**Option 1"** to request an IRS Tax Account Transcript or select "**Option 2"** to request an IRS Tax Return Transcript and then enter "**2012**".

- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript or an IRS Tax Account Transcript, whichever was requested, 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 and IRS Tax Account 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

4 IRS Form 4506T-EZ should be used only when requesting an IRS Tax Return Transcript. [See below for information on using IRS Form 4506-T for requesting an IRS Tax Account Transcript and an IRS Record of Account.]

5 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 either the IRS or 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 "2012" to receive tax information for the 2012 tax year that is required for the 2013-2014 FAFSA.

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

- Tax filers can expect to receive their transcript within 10 business 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 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

6 IRS Form 4506-T should be used if requesting an IRS Tax Account Transcript or an IRS Record of Account. Note that IRS Form 4506-T is the only way to request an IRS Record of Account.

7 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 as filed with the IRS. It is the address where the IRS Tax Account Transcript or IRS Record of Account 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 IRS or 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 Account Transcript or IRS Record of Account mailed directly to a third party by the IRS.

8 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 Account Transcript or IRS Record of Account to the aid applicant, as the two names may be different.

- On line 6, enter the tax form number that you are requesting (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 “12/31/2012” to receive IRS tax information for the 2012 tax year that is required for the 2013-2014 FAFSA.
- The tax filers must sign and date the form and enter their telephone number. Transcripts of jointly filed tax returns may be furnished to either spouse. Only one signature is required. Sign the Form 4506-T exactly as your name appeared on the original return. If you changed your name, 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 Form 4506-T.

- Tax filers can expect to receive their IRS Tax Account Transcript or IRS Record of Account within 30 calendar days from the time the IRS receives and processes their signed request. NOTE: Processing 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 or Record of Account.