

## **IRS Tax Return Transcript Request Process for Financial Aid Verification**

Tax filers can request a transcript, free of charge, of their 2012 tax return from the Internal Revenue Service (IRS) in one of three ways. Due to changes in federal financial aid regulations, institutions can no longer accept copies of federal income tax returns to satisfy financial aid verification requirements.

Financial aid applicants should not list SUNY UB as the third party to receive the IRS Tax Return Transcript since institutions will have difficulty matching incoming IRS Tax Return Transcripts to the aid applicant. It is required that all IRS Tax Return Transcripts to be received directly by the tax filer and for all tax transcripts to be submitted to the SUNY UB Student Resource Center.

**\*Please note that the filer should sign the IRS tax return transcript at the bottom of the first page.\***

### **Option #1: Online Request**

- Go to the IRS Web site at [www.irs.gov](http://www.irs.gov)
- In the “Tools” section of the homepage click “Order a Tax Return or Account Transcript”
- Under (3) Go get your transcript, Click: Tax Return Transcript
- “Order a Transcript”
- 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 U.S. Postal Service, the IRS may have the updated address on file.
- Click “Continue”
- **In the Type of Transcript field, select “Return Transcript” and in the Tax Year field, select “2012” and “continue”. Do not select “Account Transcript” as this is not a copy of the entire tax return. The “Return Transcript” is the IRS document that should be requested.**
- 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.

## Option #2: 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 U.S. Postal Service, the IRS may have the updated address on file.
- 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 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.

## Option #3: 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 U.S. 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.
- On line 6, enter “2012” to receive IRS tax information for the 2012 tax year that is required for the 2013-2014 Free Application for Federal Student Aid (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.