

TO REQUEST FOR OFFICIAL TAX TRANSCRIPT for FINANCIAL AID VERIFICATION PROCESS:

NOTE TO USERS:

Visit www.irs.gov for comprehensive information

How to Get Transcript:

NOTE: TAX FILERS ARE HIGHLY ENCOURAGED TO UTILIZE DATA RETRIEVAL TOOL THAT IS INBUILT IN FAFSA APPLICATION PROCESS.

<https://www.youtube.com/watch?v=9ZNRdk3iXeM>

You can get a transcript by telephone call, online or by mail to view your tax account transactions

The method you used to file your return and whether you have a refund or balance due, affects your current year transcript availability.

- To use **Get Transcript Online**, you must have a Social Security number (SSN) and immediate access to your email account to confirm your email address. Then you'll need to answer personal, financial and tax related questions to verify your identity. **Note:** If you previously registered for Get Transcript, an Identity Protection PIN (IP PIN) or an Online Payment Agreement, you should log in with the same user ID and password.
- To use **Get Transcript by Mail**, you need your SSN or an [Individual Tax Identification Number \(ITIN\)](#), date of birth, and address from your latest tax return.

Current Year Transcript Availability

Use the table below to determine the general timeframe when you can request a transcript for a current year Form 1040, 1040A, or 1040EZ return filed on or before the April due date. Availability varies based on the method you used to file your return and whether you have a refund or balance due.

When your original return shows a ...	and you filed <i>electronically</i>, then	and you filed on <i>paper</i>, then
refund amount or no balance due,	Allow 2-3 weeks after return submission before you request a transcript.	Allow 6-8 weeks after you mailed your return before you request a transcript.
balance due and you paid in full with your return,	Allow 2-3 weeks after return submission before you request a transcript.	We process your return in June and you can request a transcript in mid to late June.
balance due and you paid in full after submitting the return,	Allow 3-4 weeks after full payment before you request a transcript.	Note: we process all payments upon receipt.
balance due and you didn't pay in full,	We process your return in mid-May and you can request a transcript by late May.	

Request Tax Transcript by 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 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 "**2014**".
- 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.

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 Record"
- Click "Get Transcript ONLINE" If you have log in credentials
- Click "Get Transcript by MAIL"
- 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 "2014".
- 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.

Request Tax Transcript by Paper Request Form – IRS Form 4506T-EZ:

- IRS Form 4506T-EZ should be used only when requesting 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 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 “2014” to receive tax information for the 2014 tax year that is required for the 2015-2016 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.