

University of St. Augustine for Health Sciences

IRS Tax Return Transcript Request Process

Tax filers (including victims of IRS tax-related identity theft) can request from the Internal Revenue Service (IRS) an IRS Tax Return Transcript of their 2015 IRS tax return information, free of charge, in several 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.

Joint Tax Return - When requesting a transcript using the electronic processes described below, use the primary tax filer's information (e.g., SSN). When requesting a transcript using the paper process described below, either spouse may submit the request and only one signature is required.

In most cases, for electronic tax return filers, 2015 IRS income tax information is available for the IRS DRT (IRS Data Retrieval Tool) or the IRS Tax Return Transcript within 2-3 weeks after the 2015 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2015 paper IRS income tax returns, the 2015 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 6-8 weeks after the 2015 paper IRS income tax return has been received by the IRS.

Online Request - Get Transcript ONLINE

- Available on the IRS Web site at www.irs.gov.
- Under the Tools heading on the IRS homepage click "Get a Tax Transcript"
- Click "Get Transcript ONLINE."
- The tax filer must click "Get Started" if a first time user or log in if a returning user.
- Follow the prompts to request a transcript.

PLEASE NOTE: *If you are not able to successfully register for the Get Transcript Online, you will be able to request a tax return transcript using one of the other methods mentioned below*

Online Request - Get Transcript by MAIL

- Available on the IRS Web site at www.irs.gov.
- Under the Tools heading on the IRS homepage click “Get a Tax Transcript”
- 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” and, in the **Tax Year** field, select “2015.” *Do not select “IRS Tax Account Transcript”.*
- Click “Continue.”
- 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.
- IRS Tax Return Transcripts requested online cannot be mailed to an address other than the address on file with the IRS.

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

- Download a PDF for the 4506T-EZ at <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf>
- Complete lines 1 – 4, following the instructions on page 2 of the form.
- 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 IRS Tax Return Transcript from the IRS. Third parties should provide specific address information including a room #, ATTN lines, names, etc. so that the transcript is delivered to the appropriate person/office. The IRS will send the transcript only to the address listed on Line 5. The IRS will not mail a copy of the transcript to the tax filer, nor will the tax filer receive notification that the transcript was sent to the designated third party. If you choose to have your transcript sent directly to University of St. Augustine, please enter the following information:

California Campus Office of Financial Aid 700 Windy Point Drive San Marcos, CA 92069 1-800-241-1027	Texas Campus Office of Financial Aid 5401 La Crosse Avenue Austin, Texas 78739 1-800-241-1027	Florida Campus Office of Financial Aid 1 University Boulevard St. Augustine, FL 32086 1-800-241-1027	Miami Campus Office of Financial Aid 1-800-241-1027
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PLEASE NOTE: University of St. Augustine may have difficulty matching an IRS Tax Return Transcript of a married applicant that files separately from their spouse since the spouse’s transcript will not show the aid applicant’s information. Please keep this in mind when determining whether or not to have your transcript sent to University of St. Augustine directly.

- On line 6, enter “2015” to receive tax information for the 2015 tax year that is required for 2016-2017 FAFSA® verification.
- The tax filer must sign and date the form and enter their telephone number. 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. 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.

Paper Request Form – IRS Form 4506-T, Request for Transcript of Tax Return

- Download a PDF for the 4506-T at <http://www.irs.gov/pub/irs-pdf/f4506t.pdf>.
- Complete lines 1 – 4, following the instructions on page 2 of the form.
- Line 5 provides tax filers with the option to have their IRS Tax Return Transcript or IRS Record of Account 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 IRS Tax Return Transcript or IRS Record of Account from the IRS. Third parties should provide specific address information including a room #, ATTN lines, names, etc. so that the transcript is delivered to the appropriate person/office. The IRS will send the transcript only to the address listed on Line 5. The IRS will not mail a copy of the transcript to the tax filer, nor will the tax filer receive notification that the transcript was sent to the designated third party. If you choose to have your transcript sent directly to University of St. Augustine, please enter the following information:

<p>California Campus 700 Windy Point Drive San Marcos, CA 92069 1-800-241-1027</p>	<p>Texas Campus 5401 La Crosse Avenue Austin, Texas 78739 1-800-241-1027</p>	<p>Florida Campus 1 University Boulevard St. Augustine, FL 32086 1-800-241-1027</p>	<p>Miami Campus Office of Financial Aid 1-800-241-1027</p>
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- On line 6, enter the tax form number that is being requested (1040, 1040A, 1040EZ, etc.) and then check box (a) Return Transcript. Only one tax form number can be used per request.
- On line 9, enter “12/31/2015” to receive IRS tax information for the 2015 tax year that is required for 2016-2017 FAFSA® verification.
- The tax filer must sign and date the form and enter their telephone number. 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 or IRS Record of Account within 10 business days from the time the IRS receives and processes the completed and signed 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.

Telephone Request

- Available from the IRS by calling 1-800-908-9946.
- To continue in English press 1.
- Tax filers must follow prompts to enter their Social Security number and the numbers in their street address
- Select “**Option 2**” to request an IRS Tax Return Transcript and then enter “**2015.**”
- 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.

Victims of IRS Tax-Related Identity Theft

Individuals who are victims of IRS tax-related identity theft must submit to the institution:

- A 2015 Tax Return DataBase View (TRDBV) transcript obtained from the IRS; and
- A statement signed and dated by the tax filer indicating that they were victims of IRS tax-related identity theft and that the IRS has been made aware of the tax-related identity theft.

Tax filers may obtain a TRDBV transcript and inform the IRS of the tax-related identity theft by calling the IRS's Identity Protection Specialized Unit (IPSU) at 1-800-908-4490. The IPSU will first authenticate the identity of the tax filer, who can then ask the IRS to mail them a 2015 TRDBV transcript.

Verification of Non-filing

Individuals who did not file an IRS tax return for 2015 can use the Get Transcript Online option (if successfully registered) to obtain a PDF page indicating that the IRS has no record of a tax return being filed.

Individuals who are not able to successfully register to use the Get Transcript Online tool will need to request a Verification of Non-filing (VONF) letter using the IRS Form 4506-T. A VONF letter is not available through the online Get Transcript by Mail or through the automated phone request process.