

IRS Tax Return Transcript Request Process

REQUIRED: You must list the Lourdes student's full name and either the student's SSN or the student's Lourdes ID on the Tax Transcript so that we are able to match the transcript to the correct student

There are 3 ways to request an IRS Tax Transcript. Tax filers can request a transcript, free of charge, of their 2013 tax return from the IRS. Choose one from the three below:

Option 1: Online Request

- Available on the IRS Web site at www.irs.gov
- Under the “**Tools**” section of the homepage click “**Get a Transcript of Your Tax Records**”
- Option One: Order Online.
 - Select “**Get a Transcript Online**”
 - You will need to set up an account with the IRS to receive your transcript this way.
 - 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 US 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 the year you are requesting.
 - If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request, within five to 10 days from the time the online 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 Two: Order 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 through the US Postal Service, the IRS may have the updated address on file.
 - In the **Type of Transcript** field, select “Return Transcript” and in the **Tax Year** field, select “2013”.
 - 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

Note: *IRS Tax Return Transcripts requested by telephone cannot be sent directly to a third party by the IRS.*

- 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 US Postal Service, the IRS may have the updated address on file.
- 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 that was used in their telephone request, within 5 to 10 days from the time the IRS receives the request.

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 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.
- *(Note from Lourdes: **DO NOT HAVE THE TRANSCRIPT SENT TO LOURDES!**)*
- On line 6, enter “2013” to receive IRS tax information for the 2013 tax year that is required for the 2013-2014 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.