



IRS Tax Transcript Request Process

If you return to fafsa.ed.gov and make a correction to your FAFSA, you can use the **IRS Retrieval Tool** to download your tax information. **This is the easiest and fastest option!** If you do so, we will not need your tax transcript. Otherwise, follow the steps below.

Tax filers can request a transcript, free of charge, of their 2015 tax return from the IRS in one of three ways:

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 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 **"2015"**.
- If successful 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.

Online Request

- Available on the IRS Web Site at www.irs.gov
- In the "tools" section, select "Get Transcript for My Tax Records"
- Choose either ONLINE or MAIL
- The ONLINE option will allow you to immediately print your transcript or save it as a PDF
- You will first need to create an account at IRS.GOV (you will be prompted to do so)
- Once logged in to your new account, select **2015** in the **Tax Return Transcript** section
- A new window will open containing your transcript
- For mail requests, 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 online request was successfully transmitted to the IRS.

Paper Request Form – IRS Form 4506-EZ

- IRS Form 4506 –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 Tax Return Transcript mailed directly to a third party by the IRS.
- 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. If you have requested a parents Tax transcript, be sure to contact the school and let them know you have made the request and also give them your name along with your parents name so we can match them up when we receive the transcript.
- On line 6, enter “2015” to receive IRS tax information for the 2015 tax year that is required for the 2015-2016 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.