

## **Tax Return Transcript Instructions:**

### **Option #1A: Online Request - view, download and/or print your Transcript**

- Go to the IRS Web site at <https://www.irs.gov/>
- On the home page click “Get Your Tax Record”.
- Click “Get Transcript Online”.
- You will need the following information: Full Name, Email, Birthdate, Social Security Number, Tax Filing Status, U.S. based Mobile Phone number and Current Address. To verify your identity they will need info on ONE of the following: Credit Card **OR** Mortgage or Home Equity Loan **OR** Home Equity Line of Credit **OR** Auto Loan.
- You can now click on the “2018 Return Transcript” to view, download and/or print. Do not use the “Account Transcript” as this is not a copy of the entire tax return.

### **Option #1B: Online Request – get Transcript delivered by mail**

- Go to the IRS Web site at <https://www.irs.gov/>
- On the home page click “Get Your Tax Record”.
- Click “Get Transcript Online”.
- You will need the following information: Social Security Number or Tax Identification Number, Birthdate and mailing address from your latest tax return.
- 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 the 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 “**2018**”.
- 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 <https://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 a third party by the IRS.
- On line 6, enter “**2018**” to receive IRS tax information for the 2017 tax year that is required for the 2018-2019 Financial Assistance Application. 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.

### Helpful Links:

Tax Return Transcripts: <https://www.irs.gov/individuals/get-transcript>

Order a Transcript: <https://sa.www4.irs.gov/irfof-tra/start.do>