

# Instructions for Tax Filers

## IRS Tax Return Transcript Request Process for Filers

Tax filers can request a transcript, free of charge, of their “2018” tax return from the IRS in one of three ways.

- Please be sure to request an **“IRS Tax Return Transcript”** and not an IRS Tax Account Transcript.
- **If you must provide proof of non-filing status, please follow instructions below and order a transcript. The information will be mailed to you stating “no record of return filed” or “no transcript on file”. Turn this into the financial aid office.**
- **IF SUBMITTING A TAX RETURN, THEN PLEASE SIGN AND DATE THE TOP PAGE.**

### **Online Request:**

- Available on the IRS website at [www.irs.gov](http://www.irs.gov)
- On homepage click “Get your Tax Record”
- Click “Get Transcript by Mail”
- Enter the tax filer’s social security number, date of birth, street address, and zip 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 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 “2018”
- 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.
- **NOTE:** IRS Tax Return Transcripts requested online cannot be sent directly to a third party by the IRS.

### **Telephone Request: Do not use if requesting non-filer transcript.**

- 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 “2018”.
- 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.
- **NOTE:** IRS Tax Return Transcripts requested by telephone cannot be sent directly to a third party by the IRS.

### **Paper Request Form - IRS Form 4506-T or 4506-EZ:**

- Download at [www.irs.gov/pub/irs-pdf/f4506t.pdf](http://www.irs.gov/pub/irs-pdf/f4506t.pdf) or [www.irs.gov/pub/irs-pdf/f4506tez.pdf](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.
- On line 5b, please indicate student ID number.
- On line 6, enter “2018” to receive the IRS tax information for the 2018 tax year.
- The tax filer (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.
- If requesting verification of **non-filer**, check **box 7** and indicate the year requested on **line 9**, for example, **2018**.
- Please read the attestation clause, and if you have authority to sign the form also check of the “Signatory Attests” box.
- Mail or fax the completed IRS Form 4506-T or 4506- EZ to the appropriate address (or fax number) provided on page 2 of Form 4506-T or 4506-EZ.
- Tax filers can expect to receive their transcript within 5 to 10 days from the time the IRS received and processes their signed request. **Note:** Processing form 4506-T or 4506-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 they are not able to provide the transcript.