

## IRS Tax Return Transcript Request Options

You can request a tax return transcript from the IRS, free of charge, in one of the following three ways. Additionally, you may also use the paper IRS Form 4506-T to request a W-2 Transcript.

### Online Request

- Go to the IRS website at [www.irs.gov](http://www.irs.gov).
- Under the **Tools** section of the homepage click "Order a Return or Account Transcript."
- Click "Order a Transcript."
- Enter the tax filer's personal information as requested. Use the address currently on file with the IRS, which is typically the 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.
- Click "Continue."
- In the **Type of Transcript** field, select "Return Transcript" and the **Tax Year** field, select the year you need.
- 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 – 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 3<sup>rd</sup>-party by the IRS.

### Telephone Request

- Call the IRS at 1-800-908-9946.
- Follow the prompts to select your preferred language.
- Follow the prompts to enter the tax filer's personal information including their social security number and the numbers in their street address. Use the address currently on file with the IRS, which is typically the 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.
- If you are unable to verify your personal information you may call the IRS at 1-800-829-1040 for personal assistance.
- Select **Option 2** to request an IRS Tax "Return" Transcript and then enter the year you need.
- If successfully validated, tax filers can expect to receive a paper IRS Tax Transcript at the address included in their online request within 5 – 10 days from the time the IRS receives the request.
- NOTE: IRS Tax Transcripts request online cannot be sent directly to a 3<sup>rd</sup>-party by the IRS.

### Paper Request – Form 4506T-EZ

- IRS Form 4506T-EZ should be used instead of IRS Form 4506-T because it's a simpler form for requesting a Tax Return Transcript.
- Download the form 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 on file with the IRS, which is typically the 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.
- Line 5 provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a 3<sup>rd</sup>-party; however, students should have the document mailed directly to themselves.
- On line 6, enter the year of the Tax Return Transcript that is needed.
- 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.
- Mail or fax the completed form to the appropriate address or fax number provided on page 2 of the Form 4506T-EZ.
- Tax filers can expect to receive their transcript within 5 – 10 business 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.

### Verification of Non-filing and W-2 Transcript Requests

- Requests for Verifications of Non-filing or W-2 Transcripts can be made using the IRS Form 4506-T. **Note that Verifications of Non-filing are not available until after June 15<sup>th</sup> of the year following the tax year being requested.** For example, your Verification of Non-Filing for the 2012 tax year will not be available from the IRS until after June 15<sup>th</sup>, 2013.
- Download the form at [www.irs.gov/pub/irs-pdf/f4506t.pdf](http://www.irs.gov/pub/irs-pdf/f4506t.pdf).
- Complete lines 1 – 4 following the instructions on page 2 of the form. Note that line 3 should be the most current address on file with the IRS, which is typically the 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.
- Line 5 provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a 3<sup>rd</sup>-party; however, students should have the document mailed directly to themselves.
- For a **Verification of Non-filing** request, select **Option 7**.
- For a **W-2 Transcript** request, select **Option 8**.
- Enter the tax year(s) for which you are requesting the transcript on line 9.
- 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.
- Mail or fax the completed form to the appropriate address or fax number provided on page 2 of the Form 4506-T.
- Tax filers can expect to receive their transcript within 5 – 10 business days from the time the IRS receives and processes their signed request.
- NOTE: Processing form 4506-T 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.