

# IRS Tax Transcript Request Process

Tax Filer's may request a transcript, free of charge, of their 2011 Federal Tax Return from the IRS in one of three ways.

## Online Request

- Go to the IRS Website at [www.irs.gov](http://www.irs.gov)
- In the **Online Services** section of the homepage click ***“Order a Tax Return or Account Transcript”***
- Click ***“Order a Transcript”***
- 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 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 ***“2011”***.
- If successfully validated, tax filer's 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.

## Telephone Request

- Call the IRS at **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 and street number on file.
- Select Option 2 to request an IRS Tax Return Transcript and then enter **2011**.

- If successfully validated, tax filer's 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.

### **Paper Request Form –IRS Form 4506T-EZ**

- IRS Form 4506-EZ may be used to request an IRS Tax Return Transcript.
- Download the form from <http://www.irs.gov/pubs/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. DO NOT use this line to have the IRS Tax Return Transcript mailed directly to the college.
- On line 6, enter **2011** to receive IRS tax information for the 2011 tax year that is required for the 2012-2013 Academic Year.
- The tax filers (or spouse if requesting information from a joint return) must sign and date the form and enter their telephone number. Only one signature is required to request a IRS Tax Return 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 IRS Tax Return Transcript within 5 to 10 days from the time the IRS receives and processes their signed request. NOTE: Processing form 4506T-EZ means verifying 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.