

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

### **PRINT YOUR TAX TRANSCRIPTS**

- The option to print your Tax Transcripts is available on the IRS Web site at <https://www.irs.gov/individuals/get-transcript>
- Click on “Get Transcript Online”
- Log in or create an account (if you don’t have one)
- In the **Reason you need a transcript** field, select “Higher Education/Student Aid”
- The page will generate all documents available. Under the “Return Transcript” box select year desired.
- If your information is successfully validated, you will be able to print your tax transcript.

### **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 year desired.
- 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.

# IRS TAX RETURN TRANSCRIPT REQUEST PROCESS

PAU, Office of Financial Aid

## 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 <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 IRS Tax Return Transcript mailed directly to a third party by the IRS.

Institutions are responsible for notifying aid applicants whether to list the institution as the third party to receive the Transcript or not. 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.

- On line 6, enter “2021” to receive IRS tax information for the 2021 tax year that is required for the 2023-2024 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.