



Option #1 Order Online Request

- ✓ Go to the IRS Web site at www.irs.gov/Individuals/Get-Transcript
- ✓ Click “Get Transcript by MAIL”
 - Warning pops up that this site is for authorized use only, click ok
- ✓ Click on Create an Account, enter the requested information.
 - The first time you visit site they will email you a confirmation code, enter this code where indicated.
 - Click on verify email confirmation code.
 - Fill in personal information, will ask for Social Security Number, Date of Birth, Address and filing status
 - You will only need to do this the first time you visit the site, retain your Username and Password as you may need this in future semesters.
- ✓ Click “Continue”. If you Select the checkbox and click the "Continue" button you will proceed as guest.
 - Proceeding as a guest user will require you to enter this information every time you access the system. If you would like this information stored for future use do not check the box. Click the "Continue" button to create a User ID and password. Site will ask questions to determine your identity. This may be questions about household size, ages, debts, and assets.*
- ✓ Click “Continue”.
- ✓ Create a Site Phrase and Site Image and select and answer security questions.
- ✓ Create a User ID and Password
- ✓ Click submit; you should get a message that indicates User Profile Successfully Created
- ✓ Click Continue
- ✓ Create a Site Phrase and Site Image and select and answer security questions.
- ✓ Select Higher Education/Student Aid as the reason you are requesting your Tax Return Transcript
- ✓ Click on the Tax Year in the Return Transcript that you are requesting (example 2016-2017 Aid requires the 2015 Transcript) *If you have a pop up blocker you will need to turn it off so Transcript can be printed.*
- ✓ Your Tax Return Transcript will be ordered and should arrive in 5-7 business days.
- ✓ Submit to the Financial Aid Office along with copies of all W2s from all jobs held in 2015



Option #2: 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 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 “2015”.
- ✓ 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 <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 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 third party by the IRS. **However, you should not select this option**, have the IRS Tax Return Transcript mailed directly to you.
- ✓ On line 6, enter “2015” to receive IRS tax information for the 2014 tax year that is required for the 2016-2017 Free Application for Federal Student Aid (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.