

IRS Tax Return Transcript Request Process

Tax filers can request a transcript, free of charge, of their Tax Return Transcript from the IRS in one of three ways available on the IRS Web site at www.irs.gov.

- In the **Tools** section of the homepage click “Get Transcripts of Your Tax Records.”

The screenshot shows the IRS website homepage. At the top left is the IRS logo. To the right are links for Subscriptions, Language, and Information For... Below these is a search bar with a magnifying glass icon and the word 'Advanced'. A navigation bar contains links for Filing, Payments, Refunds, Credits & Deductions, News & Events, Forms & Pubs, Help & Resources, and for Tax Pros. Below the navigation bar are four large buttons: 'File Your Tax Return', 'Get Your Refund Status', 'Pay Your Tax Bill', and 'IRS.gov En Español'. Underneath these are four columns of content: 'Forms and Pubs' (listing forms like 1040, 1040EZ, W-4, W-9, 1099-MISC, 941, 8962, Tax Table, Pub 15, Pub 17, and a 'More ...' link), 'Hot Topics' (listing topics like Get Free Tax Preparation Help, Notify Us of an Address Change, Should You Itemize Your Deductions?, Apply for an Employer ID Number, Affordable Care Act Tax Provisions, and a 'More ...' link), 'Tools' (listing 'Get Transcript of Your Tax Records' (highlighted with a red box), Request an Electronic Filing PIN, Find Answers to Your Tax Questions, Check Status of Your Amended Return, Renew or Obtain a PTIN for 2015, and a 'More ...' link), and 'Filing & Payment' (listing 'where's my refund?', freefile, IRS e-file, and EFTPS).

- There is an **Online** and a **Mail** option:

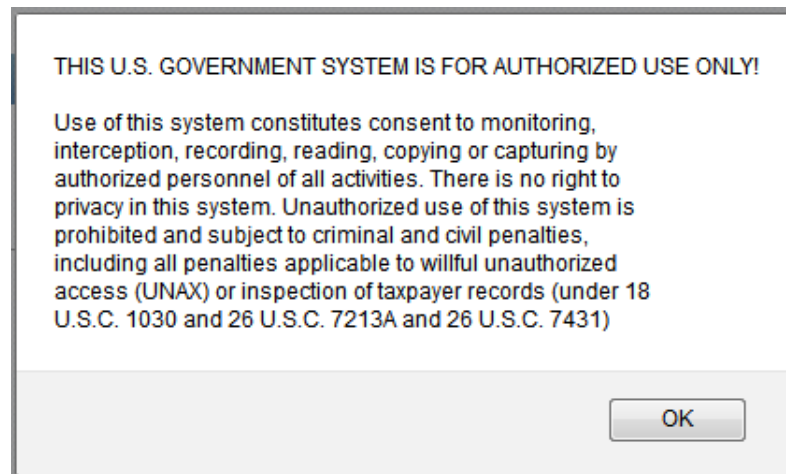
The screenshot shows the 'Get Transcript' page on the IRS website. At the top right are icons for a heart, a plus sign, and a printer. Below these is a link for 'Español'. The main text reads: 'You can get a transcript online or by mail to view your tax account transactions, line-by-line tax return information or wage and income reported to us for a specific tax year. The method you used to file your return and whether you have a refund or balance due, affects your [current year transcript availability](#). **Note:** If you need a photocopy of your return, you must use [Form 4506](#).' Below this are two bullet points: 'To use **Get Transcript Online**, you must have a Social Security number (SSN) and immediate access to your email account to confirm your email address. Then you'll need to answer personal, financial and tax related questions to verify your identity. If you previously registered, just log in with your user ID and password.' and 'To use **Get Transcript by Mail**, you need your SSN or an [Individual Tax Identification Number \(ITIN\)](#), date of birth, and address from your latest tax return.' Below the text are two large buttons: 'Get Transcript ONLINE' (with a document icon) and 'Get Transcript by MAIL' (with an envelope icon). Below each button are two bullet points: 'Transcripts ready to view, print, or download immediately*' and 'Transcript types available online' (for online) or 'Transcript types available by mail' (for mail). Below the 'Get Transcript by MAIL' button is a link for 'Get Transcript by Mail [en Español](#)'. At the bottom of the page is a note: '* The IRS never sends email requesting you to obtain, upload or access your transcripts. If you receive such an email, please forward it to our fraud group at phishing@irs.gov.'

- The fastest way to obtain a copy of your IRS Tax Return Transcripts is by selecting the Online option.
- **Important note:** The University of Arizona Office of Scholarships and Financial Aid **will not** accept IRS tax transcripts that are mailed or emailed directly from the IRS to our office. **Student/parent(s) should keep original copies for their records.**
 - The IRS tax transcript must be mailed to or downloaded from the IRS by the student/parent(s). The student/parent(s) must then provide a signed copy of this tax return transcript to the Office of Scholarships and Financial Aid. This document must have the student’s name and ID number listed at the top of each page.

Online Request

For instructions on how to receive your transcript via mail, [click here](#).

- Click on “Get Transcript Online”
- A warning message with regards to privacy will populate:



- Once you accept the privacy message by clicking Ok, you will be prompted to create an account.
- Enter your First Name, Last Name and Email address. Click on “Verify Email Confirmation Code.” The following message will populate. **DO NOT close your browser window!**



- Once you receive your code via email (this may take a few minutes), return to your previous browser window and enter the confirmation code in the allotted space, then click on “Verify Email Confirmation Code.”
- Complete step 3 by answering all of the Personal Information questions. Use the information currently on file with the IRS:

- The tax filer’s Social Security Number
- The tax filer’s Date of Birth
- Filing Status
- Street address, and zip or postal code. 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.
- Phone and Mobile number are optional
- If you do not want to store the information and have to re-enter every time you access the system, click the box that states to continue as a guest:

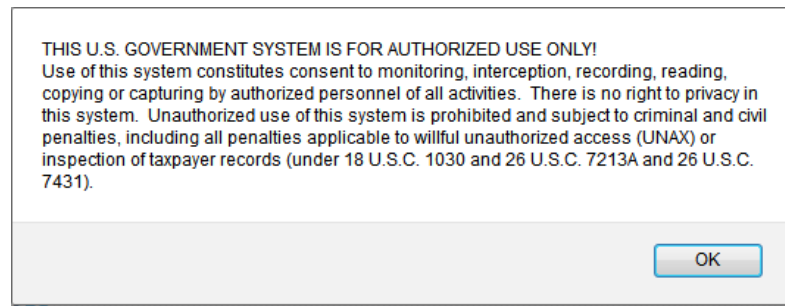
- Click “Continue.”
- Complete step 4 by answering the third party validation questions in order to continue creating your account and ordering your IRS Tax Return Transcripts
- Complete step 5 and 6 by answering any further personal questions to finalize the process of creating an IRS online account.
- Once created, select the “Higher Education/Student Aid” option, and then select the correct year under the “Return Transcript” section:

Above is an example for Tax Year 2013; be sure to select 2014 as the current fiscal year.

- Download the PDF file and submit it to our office through mail/ fax or email attachment. For further information of appropriate submission visit: <https://financialaid.arizona.edu/forms>

Paper Request Form by Mail

Click on the “Get Transcript by Mail” option. A warning message in regards to privacy will populate:



- Once you accept the privacy message by clicking OK, you be prompted to create an account.
- Enter the tax filer’s Social Security Number, date of birth, street address, and zip or postal 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.
- In the **Type of Transcript** field, select “Return Transcript” and in the **Tax Year** field, select the appropriate tax year. Click “Continue.”



Above is an example for Tax Year 2013; be sure to select 2014 as the current fiscal year.

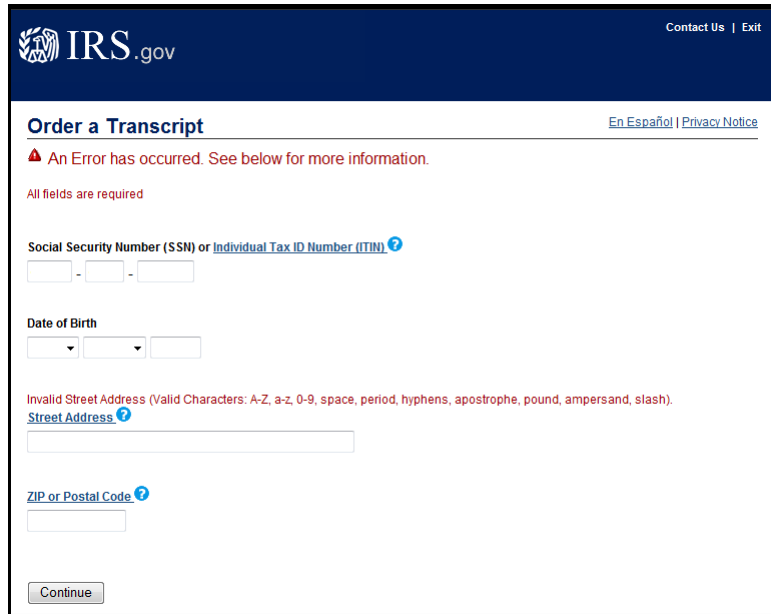
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request within 5 to 10 business days from the time the online request was successfully transmitted to the IRS.
- IRS Tax Return Transcripts requested online by Mail cannot be sent directly to a third party by the IRS.

Transcript Request Troubleshooting

1. Error with address:

You must enter your address exactly as it is listed on your tax return (no special characters; periods, commas, etc.)

If an address change has been completed through the US Postal Service, the IRS may have the updated address on file.



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An Error has occurred. See below for more information.

All fields are required

Social Security Number (SSN) or [Individual Tax ID Number \(ITIN\)](#)

____ - ____ - ____

Date of Birth

____ / ____ / ____

Invalid Street Address (Valid Characters: A-Z, a-z, 0-9, space, period, hyphens, apostrophe, pound, ampersand, slash).

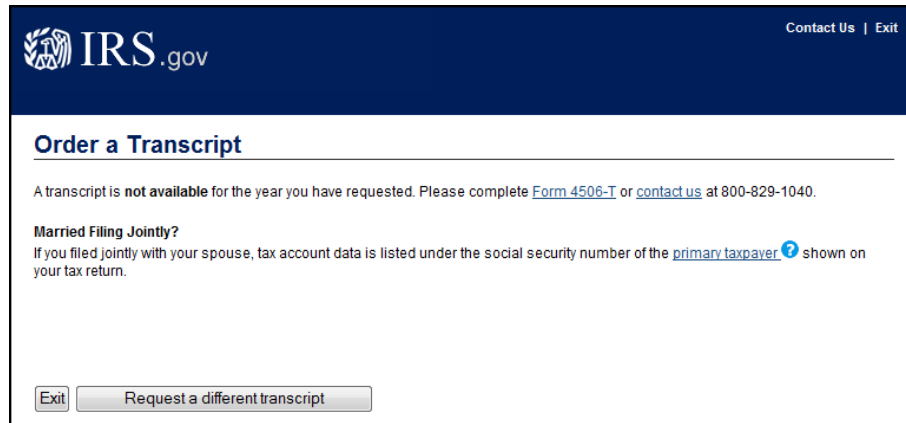
[Street Address](#)

[ZIP or Postal Code](#)

[Continue](#)

2. Error with SSN and Date of Birth

If you are married and filed taxes jointly you must use the primary taxpayer's SSN and Date of Birth.



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Order a Transcript

A transcript is **not available** for the year you have requested. Please complete [Form 4506-T](#) or [contact us](#) at 800-829-1040.

Married Filing Jointly?
If you filed jointly with your spouse, tax account data is listed under the social security number of the [primary taxpayer](#) shown on your tax return.

[Exit](#) [Request a different transcript](#)

Primary Taxpayer - When filing jointly, both spouses are listed on the tax return. The primary taxpayer is the one whose name and social security number are listed first on the tax return.

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 the 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 the appropriate tax year.
- 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 business 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 Identity Theft Victims

If a student or parent is a victim of IRS identity theft, the tax filer must:

- **ONLY** IRS identity theft victims can submit this alternate form (i.e. a fraudulent return was filed in the name of the student or parent).
- Request a Tax Return Transcript by a regular request process (online/mail/form/phone) and have their transcript request denied.
- The IRS will then refer the tax filer to the **Identity Protection Specialized Unit (IPSU)** at toll-free number at 1-800-908-4490.
- Once the tax filer’s identity is authenticated, they can request an alternative Tax Return Transcript called a Transcript Database View (TRDBV).

We realize obtaining the alternate paper tax return transcript (TRDBV) will be delayed until IPSU can authenticate the individual’s identity. Should this be the case, we recommend the tax filer work closely with IRS IPSU in resolving the authentication problem. **The University of Arizona has no ability to expedite this process.**