

IRS Tax Return Transcript Request Process

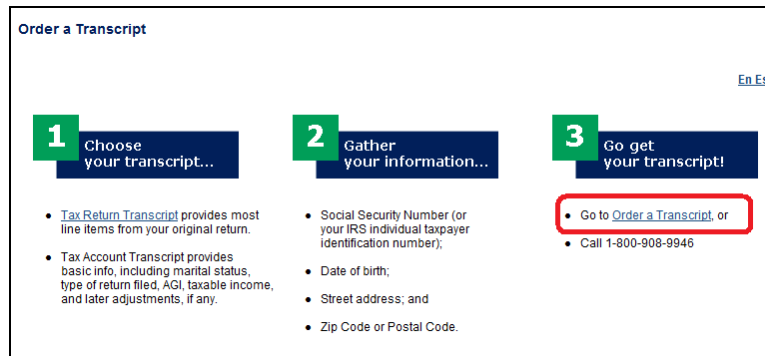
Tax filers can request a transcript, free of charge, of their tax return from the IRS in one of three ways.

Online Request

- Available on the IRS Web site at 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 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.
- Click “Continue.”
- In the **Type of Transcript** field, select “Return Transcript” and in the **Tax Year** field, select the appropriate tax year.

Order a Transcript

Type of Transcript ?

Return Transcript ▼

Select

Account Transcript

Return Transcript

Continue

- 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 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

- 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 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 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.
 - ***Important note:*** The University of Arizona Office of Scholarships and Financial Aid ***will not*** accept IRS tax transcripts that are sent directly from the IRS to our office.

The IRS tax transcript must be mailed from the IRS to the student/parent(s). The student/parent(s) must then provide a signed copy of this tax 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.

- On line 6, enter the appropriate tax year.
- 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.

Transcript Request Troubleshooting

1. Error with address:

You must enter your address exactly as it is listed on your tax return.

IRS.gov [Contact Us](#) | [Exit](#)

Order a Transcript [En Español](#) | [Privacy Notice](#)

▲ 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

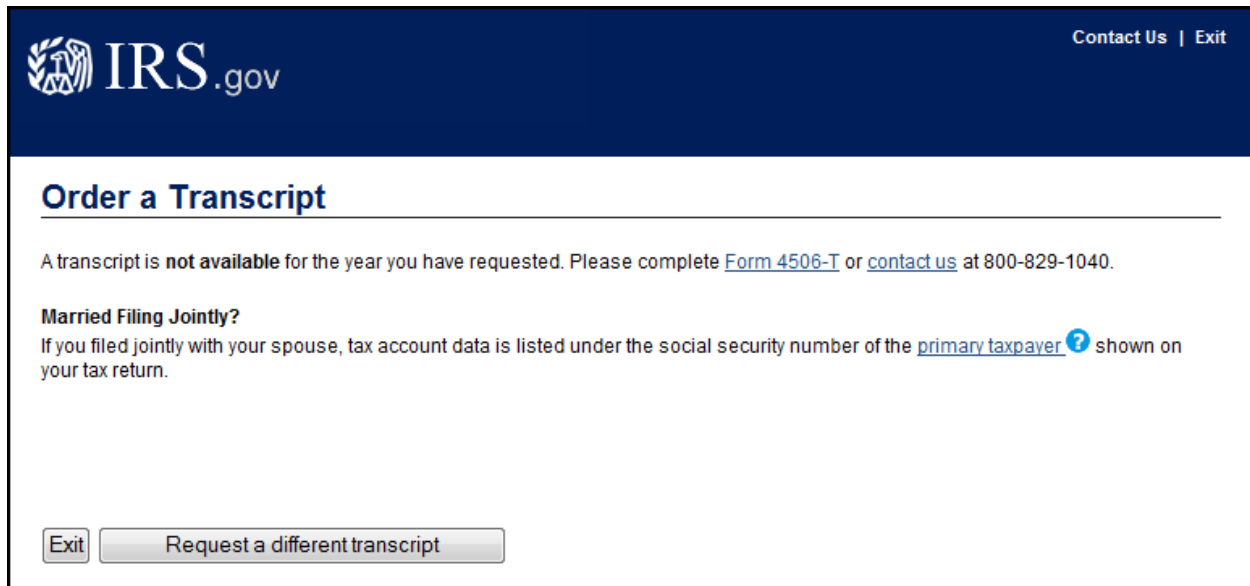
Invalid Street Address (Valid Characters: A-Z, a-z, 0-9, space, period, hyphens, apostrophe, pound, ampersand, slash).

[Street Address](#) [?](#)

[ZIP or Postal Code](#) [?](#)

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.



The screenshot shows the IRS.gov website interface. At the top left is the IRS logo and 'IRS.gov'. At the top right are links for 'Contact Us' and 'Exit'. The main heading is 'Order a Transcript'. Below this, a message states: 'A transcript is **not available** for the year you have requested. Please complete [Form 4506-T](#) or [contact us](#) at 800-829-1040.' A section titled 'Married Filing Jointly?' explains: '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.' At the bottom, there are two buttons: 'Exit' and '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.