

## **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](http://www.irs.gov)
- In the **TOOLS** section of the homepage click “Get Transcript of Your Tax Records”.
- Click “Get Transcript ONLINE” button to download and print your **Tax Return** transcript immediately.



- Sign In OR Create an Account (if it is your first time getting your transcript online). If you need to create an account, enter your information. Make sure you use the address you currently have 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. All identifying information must be entered EXACTLY how it shows on your most recent tax return (i.e. Rd instead of Road, etc.) Make sure you follow all instructions so that your account is set up properly and make note of your login and password.
- Select “Higher Education/Student Aid” for the reason you are requesting the transcript.
- Under “Return Transcript” select the tax year you are requesting. You must allow ample time for your tax return to be processed before requesting the transcript (2-3 weeks for electronic filers, 8-10 weeks for filers that mail in paper returns).
- Make sure that your internet browser will allow for Pop-Ups from [www4.irs.gov](http://www4.irs.gov)-- the IRS site.

## **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 the tax year you are requesting.
- 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 - **DO NOT HAVE THE TAX RETURN TRANSCRIPT SENT DIRECTLY TO UMES.**  
  
Please request to have the transcript sent to the tax filer(s) so that a personal copy can be made prior to submission to the UMES Office of Student Financial Aid.
- On line 6, enter the tax return year(s) you are requesting.
- 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.*