

IRS Tax Return Transcript Request Process

(for award year 2016-2017)

The preferred method for supplying tax data on the FAFSA is to make a correction to the FAFSA and use the IRS Data Retrieval Tool to transfer the data directly from the IRS into the FAFSA. By doing this, we will receive the correction within a week of the submitted correction. Provided the transferred data was not changed after transfer, we would then not require the tax transcripts which can take up to 10 days for you to receive from the IRS and additionally the mail time to submit them to the Financial Aid Office.

Notes about Requesting an IRS Federal Tax Return Transcript:

- You must use the address currently on file with the IRS. Generally this will be the address that was listed on the most recent 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.
- Tax filers should request the **2015** federal tax return transcript for the 2016-2017 award year.

Tax filers can request a Federal Tax Return Transcript, free of charge, from the IRS in one of three ways:

Online Request:

- Go to www.irs.gov
- On the homepage, under the 'Tools' section (middle of page), click on 'Get Transcript of Your Tax Records'

To Show Transcript Immediately: (currently unavailable)

- Click on 'Get Transcript Online.' You must create or reactivate your account by following the screen prompts.
- Sign into your IRS account.
- Select the reason you are requesting a transcript as 'Higher Education/Student Aid'
- Select '2015' under Return Transcript and a PDF of the tax filer's transcript should open, which can then be printed.

To Receive Transcript by Mail:

- Click on 'Get Transcript by Mail'
- Enter the tax filer's Social Security Number, date of birth, street address and zip code. Click 'Continue'
- In the **Type of Transcript** field, select 'Return Transcript' and in the **Tax Year** field, select '2015'
- 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 after the request is submitted to the IRS.

Telephone Request:

- Call the IRS at 1-800-908-9946
- Tax filers must follow prompts to enter their social security number and the numbers in their street address.
- 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 included in their phone request, within 5 to 10 days after the request is submitted to the IRS.

Paper Request – 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 the form 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 your current address and line 4 should be the address on your most recently filed tax return, if different than the address on line 3.
- Line 5 provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS. Please do **NOT** have the IRS Tax Return Transcript mailed directly to Lakeland College as we may have difficulty matching a parent's incoming IRS Tax Return Transcript to a student's file, as the two names may be different.
- On line 6, enter '**2015**' to receive IRS tax information for the 2015 tax year that is required for the 2016-2017 FAFSA.
- The tax filer (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 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.