

IRS Tax Return Transcript Request Process

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, we would 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.

Tax filers can request a Federal Tax Return Transcript, free of charge, from the IRS in one of three ways. The telephone method is the preferred method.

1. 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. *(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 “**2012**”.

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.*

2. Online Request

- Go to www.irs.gov
- On the homepage, under the ‘Tools’ section (middle of page), click on ‘Order a Tax Return or Account Transcript’
- Click on ‘Order a Transcript’ (under #3)
- Enter the tax filer’s Social Security Number, date of birth, street address and zip code. *(You must 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 “2012”.

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.*

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 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 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. 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 “**2012**” to receive IRS tax information for the 2012 tax year that is required for the 2013-2014 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.