

IRS Tax Return Transcript Request Process

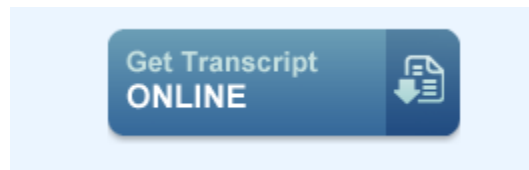
Immediate Online Request

- Available on the IRS Web site at www.irs.gov
- Under the Tools section, click “Get a tax transcript”:

Tools

- › Apply for an online payment plan
- › Get a tax transcript
- › Apply for an employer ID number
- › Change your tax withholding
- › Check status of your amended return
- › More ...

- Click “Get Transcript ONLINE” to display your transcript immediately and print a copy.



- If you are a First Time User, click “Get Started”. If you are a Returning User, enter your username and click “Log In”. If you forgot your username, then click “Forgot Username”. An email will be sent to your email address on file.
- **First Time Users:** Once you get your confirmation code, you will then need to register your account with a series of personal security questions. When entering your mailing address, 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.
- After successful account creation and once logged in, it will bring you directly to “Get Transcript.” Choose the reason you are requesting a transcript “Higher Education/Student Aid.” Then select the **Return Transcript** year of **2015**. Be sure your pop-up blocker is disabled. Print a copy of your transcript. Be sure to include the student’s student ID number before you send it to our office.

Online Request via Mail

- Available on the IRS Web site at www.irs.gov
- Under the Tools section, click “Get a tax transcript”

Tools

- › Apply for an online payment plan
- › **Get a tax transcript**
- › Apply for an employer ID number
- › Change your tax withholding
- › Check status of your amended return
- › More ...

- Click “Get Transcript by MAIL” to request a hard copy in 5-10 calendar days



- Enter your Social Security Number, Date of Birth, Street Address and Zip Code. When entering your address, 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.
- Select Type of Transcript: **Return Transcript**. For Tax Year: **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 from the time the on-line request was successfully transmitted to the IRS.

Please do not request transcripts be sent directly to Merrimack College, as transcripts do not contain sufficient information necessary for student identification. Please be sure to include the student’s ID number on all transcripts submitted.

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 “**2015.**”
- 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.

Please do not request transcripts be sent directly to Merrimack College, as transcripts do not contain sufficient information necessary for student identification.

- 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 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.