

What is a tax transcript?

The tax transcript is a simplified version of the completed return and serves as a document to prove that a person has filed a particular tax return. It is important that the income one inputs on the FAFSA has actually been filed with the federal government. A tax return transcript provides most line items from the original return and is provided by the IRS as a result of filing a federal tax return.

Why is a tax transcript necessary?

It is the Department of Education's expectation that schools will rely on information provided by the IRS as the primary source of documentation for verification purposes. Federal regulations state that **copies** of income tax returns are no longer acceptable.

How do I request a tax transcript?

- Print a tax return transcript immediately <http://www.irs.gov/Individuals/Get-Transcript> - select "get transcript online" (or request by mail to receive in 5 to 10 calendar days – select "get transcript by mail")
- Obtain a copy of the IRS tax return transcripts directly from the local IRS office (specific locations only). To locate an IRS office, please visit the following website: <http://www.irs.gov/localcontacts/index.html>.
- Use IRS Form 4506T-EZ "Short Form Request for Individual Tax Return Transcript" (**preferred**) or IRS Form 4506-T "Request for Transcript of Tax Return"
- Dial 1-800-908-9946 (option #2) to request a transcript to be sent directly to you.
Listen carefully to the automated menu, after entering SSN, and address info there will be a brief description and explanation. Once provided options, select **Transcript of Tax Return = OPTION #2**. You will then be prompted to enter the tax year for which you are requesting (Ex: 2014). The system will then confirm the request. Allow five to ten days for delivery if ordered online or by phone.
- Using the IRS2Go App:
Apple Online Store at: <https://itunes.apple.com/us/app/irs2go/id414113282?mt=8>
Using Google Play at: <https://play.google.com/store/apps/details?id=gov.irs>

There is NO charge for tax transcripts.

Reminders with regard to form 4506-T or 4506T-EZ

The IRS is very particular about the information provided on the form 4506-T or T-EZ, any small inaccuracy or error can trigger a rejection. The Form 4506-T or Form 4506T-EZ must be PRINTED, completed fully and correctly, and then properly signed and dated by the taxpayer.

When completing and submitting form 4506-T or T-EZ, it is important that the form be complete and legible (that is, containing no strikethroughs, scratch-outs or whiteout information), otherwise the request may be rejected.

In addition, the IRS is extremely sensitive to address information.

The most common reason why the IRS will not process an order is that the address does not match the tax year that is requested on the form. Previous addresses should be listed on Line # 4 of the IRS Form 4506-T or T-EZ. Another reason is that the data on the form or signature is "illegible." Users are advised to make sure all information is large and readable.

Required Information:

To request a transcript, filers will need their name, address, Social Security number; spouse's name, address and Social Security number (if applicable); previous address associated with last filed a tax return; the address of a third party if sending the tax information to a third party; and the year of the tax return requested (in mm/dd/yyyy format).

On form 4506-T, be sure to check the box next to "Return Transcript" on Line 6.

Once completed, the Form 4506-T or T-EZ is mailed to the address based on location (state) where the tax return was filed, not current residence.

IRS Tax Return Transcript Request Process

Tax filers can request from the IRS an IRS Tax Return Transcript of their 2014 IRS tax return, free of charge, in various ways: online, via a local IRS office, via the IRS 2Go App, via paper request Form 4506 T-EZ or Form 4506-T, or by telephone.

Online Request

Available on the IRS Web site at <http://www.irs.gov/Individuals/Get-Transcript>

To view and print a transcript immediately, select “get transcript online”

- Proceed to “create an account”
- Complete steps 1-6 using the primary tax filer’s information
- Enter primary tax filer’s first and last name, email address
- Enter confirmation code (which is immediately sent to email address provided by the IRS) and “verify email confirmation code.”
- Enter primary tax filer’s social security number, date of birth (month/day/year), filing status, (country is pre-populated), street address, city, state and zip or postal code
- Click “continue”
- Answer four short multiple choice questions validating identity
- Click “continue”
- Get Transcript, select the reason for requesting the transcript - **Higher Education/Student Aid**
- Select “RETURN TRANSCRIPT”, select year “2014” from the years available
- Once selected, a tax return transcript will immediately appear on screen
- Print and submit to the Financial Aid Office: Carroll College, 1601 North Benton Ave, Helena, MT 59625 or via fax 406-447-5187 or via email fao@carroll.edu

To receive a transcript by mail, select “get transcript by mail”

- Enter the primary tax filer’s social security number, date of birth (day/month/year), street address, and zip or postal code. **IMPORTANT: 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 either through the IRS or the US Postal Service, the IRS may have the updated address on file, which should be used. For a joint tax return, use the primary tax filer’s social security number, date of birth, street address, and zip or postal code.
- Click “Continue”
- In the **Type of Transcript** field, select “RETURN TRANSCRIPT” and in the **Tax Year** field, select “2014.”
- 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 business days from the time the online request was successfully transmitted to the IRS.
- IRS Tax Return Transcripts requested online cannot be mailed to an address other than the address on file with the IRS. Once the tax return transcript is received, a copy must be provided to Carroll College, 1601 North Benton Ave, Helena, MT 59625 or via fax 406-447-5187.

IRS2Go App

- Apple Online Store at <https://itunes.apple.com/us/app/irs2go/id414113282?mt=8>
- Google Play at <https://play.google.com/store/apps/details?id=gov.irs>

Paper Request Form – IRS Form 4506T-EZ

- IRS Form 4506T-EZ should be used only when requesting 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 either the IRS or 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. I.e.: **Carroll College, 1601 North Benton Ave., Helena, MT 59625**
Institutions are responsible for notifying aid applicants whether to list the institution as the third party to receive the Transcript or not. Some institutions may have difficulty matching a parent's incoming IRS Tax Return Transcript to the aid applicant, as the two names may be different.
- On line 6, enter "2014" to receive tax information for the 2014 tax year that is required for the 2015-2016 FAFSA.
- The tax filers must sign and date the form and enter their telephone number. Transcripts of jointly filed tax returns may be furnished to either spouse. Only one signature is required. Sign the Form 4506T-EZ exactly as your name appeared on the original return. If you changed your name, also sign your current name.
- 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 10 business 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 IRS records, the IRS will notify the tax filer that it was not able to provide the transcript.

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 either through the IRS or the US Postal Service, the IRS may have the updated address on file. For a joint tax return, use the primary tax filer's social security number, date of birth, street address, and zip or postal code.
- Select "**Option 2**" to request an IRS Tax Return Transcript and then enter "**2014**".
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript, at the address included in their telephone request, within 5 to 10 business days from the time the IRS receives the request.

IRS Tax Return Transcripts requested by telephone cannot be mailed to an address other than the address on file with the IRS. Once the tax return transcript is received, a copy must be provided to Carroll College, 1601 North Benton Ave, Helena, MT 59625 or via fax 406-447-5187.