

IRS Tax Transcript Request Procedure – Updated January 2018

Tax filers can request a copy of their tax return transcript, free of charge from the IRS in one of three ways.

Online Request

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

You can now select the “Get Transcript ONLINE” and print out a .pdf document after you have validated your identity

Click “Get Transcript ONLINE” , Then select CREATE AN ACCOUNT

Complete Step 1 of the sign up – enter name (as it appears on your tax return) and email address

Complete Step 2 of 6 – enter Confirmation code that was just emailed to the address you provided

Complete Step 3 of 6 – you may choose to continue as a “guest” or you can create a User ID one time. If you select to create an account, there will be a few more questions to answer.

Complete Step 4 of 6 – answer the validation questions correctly.

Once the above step is completed correctly, you will be given the GET TRANSCRIPT screen, select HIGHER EDUCATION/STUDENT AID button, then click the hyperlink for the YEAR of the tax transcript you would like. *(Depending upon the browser you use, you may get the .pdf tax transcript right away or you may get an error message stating the browser doesn't trust the website.)*

Print out tax transcript and close all the windows and browser completely. Submit paper copies to: Office of Financial Aid, 45 S. National Ave., Fond du Lac, WI 54935. FAX: 920-923-8767 EMAIL: finaid@marianuniversity.edu

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 for the 2017-2018 academic year OR 2016 for the 2018-2019 academic year.

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. Please note, IRS Tax Return Transcripts requested by telephone cannot be sent directly to a third party by the IRS.

Paper Request Forms – 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 the Office of Financial Aid. Use the following address: Office of Financial Aid, 45 South National Ave., Fond du Lac, WI 54935

*****Please remember to sign and date the form, or it will be considered invalid by the IRS.*****