

## IRS Tax Return Transcript Request Process

Marshall University's Office of Student Financial Assistance prefers students and parents use the **IRS Data Retrieval Tool** when completing the FAFSA. If this process is successfully used and no data elements are changed, the Office of SFA should not need to collect a Tax Return Transcript from students or parents.

Unfortunately, the IRS Data Retrieval Tool cannot be used by all applicants for a variety of reasons. If you are one of those applicants and this office has requested a copy of your or your parents Federal Tax Return Transcript, the options shown below should help you obtain a transcript. (Note: The Office of SFA cannot accept Account Transcripts.)

Tax filers may request an IRS Tax Return Transcript, free of charge, from the IRS in one of three ways: online, telephone, paper request form. If you need assistance with this process please contact the IRS at 800-829-1040.

### Online Request

- Go to [www.irs.gov](http://www.irs.gov).
- In the Online Services section of the homepage, click "Order a Tax Return Transcript or Account Transcript."
- Click "Order a Transcript."
- Enter the tax filer's Social Security Number, date of birth, street address, and zip or postal code. 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 the tax year needed.

### 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 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 "Option 2" to request an IRS Tax Return Transcript and then enter the tax year needed.

### Paper Request Form – IRS Form 4506T-EZ

- Download IRS Form 4506T-EZ at <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf>.
- Complete all lines of form as instructed on page 2 of form.
- 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 form to the appropriate address or fax number as provided on page 2 of the Form 4506T-EZ.

**If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in the request within 5 to 10 days of successful processing by the IRS.**