

How to Request a Tax Return Transcript

A “tax return transcript” is a print-out from the IRS that contains most of the information on your tax return. Although the name is similar, it is NOT the same as the tax return that you file. A tax return transcript is provided free of charge by the IRS and can be requested online, by phone, or by mail. If you are not eligible to complete the data retrieval process in the FAFSA, or if you have tried the data retrieval process and have continued to have trouble with it, you will need to request a tax return transcript.

VERY IMPORTANT: When you request a tax return transcript, have it sent to your address. Once you have received it, **make a copy for yourself**, then **write the student’s name and ID number on the original transcript**, and **send it to our office**. (Make sure to add the **name** and **ID**. Otherwise, we may not be able to match the transcript to the student). There may be an option to have it sent to a third party, but we have found that we do not reliably receive these. Also, in cases where we do receive a transcript for the parent, we may not be able to match it to the student. Finally, although not required, it is helpful for those working with the document in our office if the **transcript pages have been numbered**.

Online Request—Visit <http://www.irs.gov/Individuals/Order-a-Transcript>.

- 1) Before visiting the website have your Social Security Number handy. You will also need the address used on your tax return.
- 2) Click on the “Order a Transcript” link listed in step 3.
- 3) Be sure to select “Return Transcript” under the “Type of Transcript” field. Make sure that you request the 2015 tax information sent for the 2017-2018 FAFSA. There are other transcript types, so be sure to select “Return transcript.”
- 4) Be sure to enter the address exactly as it is on file with the IRS—this will generally be the address listed on the latest tax return filed. If you used “Street” on your tax return, do not use “St.” on the transcript request.
- 5) If filed successfully, you can expect to receive a paper IRS Tax Return Transcript at the address you provided within 5-10 days.

Telephone Request—Call IRS at 1-800-908-9946 (from the U.S.) or 267-941-1000 (from overseas).

- 1) Have your social security number and street address available. Be sure that the address you provide is the address currently on file with the IRS—this will generally be the address listed on the latest tax return filed.
- 2) Select Option 2 to request an IRS TAX Return Transcript. Enter 2015 for the 2017-2018 FAFSA.
- 3) If filed successfully, you can expect to receive a paper IRS Tax Return Transcript at the address you provided within 5-10 days.

Paper Request—Download the IRS Form 4506T-EZ or IRS Form 4506-T at <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf>.

- 1) Fill out the required information. Be sure that the address you provide is the address currently on file with the IRS—this will generally be the address listed on the latest tax return filed.
- 2) Note that we prefer that you request to have the transcript sent to yourself, and then you send the transcript to us. This is more reliable than requesting the “3rd Party option” and having the IRS send the transcript directly to Wheaton College.
- 3) Make sure that you request the 2015 tax information sent for the 2017-2018 FAFSA.
- 4) Mail the form to the address provided on page 2 of the form.
- 5) If filed successfully, you can expect to receive a paper IRS Tax Return Transcript at the address you provided within 5-10 days of the IRS receiving and processing your signed request.

Additional Tips:

- 1) You may be able to have the IRS fax you the transcript. Call the IRS for more information.
- 2) If there is a local IRS office near you, and your return has been processed, you can request and receive a transcript in person.