

IRS Tax Transcript Request Instructions

Students selected for Verification are required to submit tax return information. We recommend students do this on the FAFSA online via the [IRS Data Match Retrieval](#) option either at the time they complete their FAFSA or anytime after. However, if a student is not able or does not wish to use that option, the alternative is to submit an IRS Tax Transcript to the Office of Financial Aid. These are the options recommended by the Department of Education to request an IRS Tax Transcript.

1. Get Transcript Online: Sent to Student

- Go to the IRS Web site at www.irs.gov.
- Select “**Get Your Tax Record.**”
- Select “**Get Transcript Online**” option and follow instructions.
 - Allows you to get a transcript in real time as a PDF which you can submit electronically to our office or print and submit it as a hard copy by mail.
 - You must have (1) access to a valid email account, (2) a text-enabled mobile phone in your name, and (3) specific financial account numbers, such as a credit card number or an account number for a home mortgage or auto loan. This process will not cause charges to the card or the account.
 - In the Type of Transcript field, select “Return Transcript” and the year for the tax return in the Tax Year field.
- IRS Tax Return Transcripts requested online cannot be sent directly to a third party by the IRS – instead use Form 4506T-EZ below.

2. Get Transcript by Mail: Sent to Student

- Go to the IRS Web site at www.irs.gov.
- Select “**Get Your Tax Record.**”
- Select “**Get Your Transcript By Mail**” option and follow instructions.
 - 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.
 - In the Type of Transcript field, select “**Return Transcript**” and the year for the tax return in the Tax Year field.
- IRS Tax Return Transcripts requested online cannot be sent directly to a third party by the IRS – instead use Form 4506T-EZ below.

3. Get Transcript by Phone: Sent to Student

- 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 the 4-digit tax 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.
- IRS Tax Return Transcripts requested by telephone cannot be sent directly to a third party by the IRS – instead you must use Form 4506T-EZ below.

4. Form Request 4506T-EZ: Sent Directly to 3rd Party/School

- Download at: <https://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.
- **Complete line 5** only if you want the IRS to mail your IRS Tax Return Transcript directly to the Office of Financial Aid. If you wish to have the form sent directly to the Office of Financial Aid, please enter the address below:

**Office of Financial Aid
IIT Downtown Campus
565 W. Adams St.
Chicago, IL 60661
312-906-5180**

- **On line 6, enter** the 4-digit tax year to receive IRS tax information for the tax year that is required for the completing the FAFSA (i.e. 2014 for the 2015-16, etc.)
- 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. Retain a copy for your records.
- 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.

5. Amended Tax Return Filers – Requesting a Tax Account Transcript

- IRS Form 4506-T should be used to request an IRS Tax Account Transcript.
- Download at <http://www.irs.gov/pub/irs-pdf/f4506t.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.
- If you want the Account Transcript mailed directly to a third party from the IRS, enter the third-party information on Line 5 (see our address above).
- On **part 6**, check option “**b. Account Transcript**”.
- 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 4506-T 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 4506-T 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.

Please Note: Requested tax transcripts will not be received until after the tax return has been processed. Electronically filed tax returns will take approximately 1-2 weeks to process after the return has been filed. Paper filed tax returns will take approximately 6-8 weeks to process after the return has been filed.