



## 2023-2024 How To Request an IRS Tax Return Transcript

**\*One of these options should only be used when the IRS DRT is unavailable.\***

Tax filers can request from the IRS an IRS Tax Return Transcript of their 2020 IRS tax return, free of charge, in one of four ways:

### **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. 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 “**2021**”.
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript 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.

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

- IRS Form 4506T-EZ should be used only when requesting an IRS Tax Return Transcript. [See below for information on using IRS Form 4506-T for requesting an IRS Tax Account 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.
- Line 5 provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS. 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 "2021" to receive tax information for the 2021 tax year that is required for the 2023-2024 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.

### **Online Request**

- Available on the IRS Web site at [www.irs.gov](http://www.irs.gov)
- In the **Tools** section of the homepage click "Get Transcript for My Tax Records"
- Click "Get Transcript Online" box
- Use the address currently on file with the IRS. Generally this will be the address that was listed on the latest tax return filed. For a joint tax return, use the primary tax filer's social security number, date of birth, street address, and zip or postal code. If married but filed separately, a tax return transcript must be ordered for each person.
- Click "Create an Account"
- In the **Type of Transcript** field, select "Return Transcript" and in the **Tax Year** field, select "2021".
- Follow the six steps accordingly and if successfully validated, tax filers can print their tax transcript immediately.