Four Ways to Obtain Your 2013 IRS Tax Return Transcript

For the 2014-2015 FAFSA Award Year

Tax filers may obtain a transcript, free of charge, of their 2013 Federal Income Tax Return from the IRS in one of four ways.

Online Immediate Access to Your Electronic Transcript

- Available on the IRS Web site at http://www.irs.gov/Individuals/Get-Transcript
- Click on "Get Transcript Online," and from the next page click on "Create an Account"
- Complete steps 1-6 to set up an account
    - Step 1—Apply for and retrieve your temporary account confirmation code. Enter your name and email address and click "Send Email Confirmation Code."
    - Step 2—Enter and verify the temporary account confirmation code that was emailed to you
    - Step 3—Enter account demographic data
    - Step 4—Answer questions to verify your identity
    - Steps 5 & 6—Create a security profile and user ID and password
- Select "Higher Education/Student Aid" as your reason for requesting the Tax Return Transcript
- Select the 2013 Return Transcript
- When the Tax Return Transcript displays you may use your browser's tools to print a copy or or to save the file. Remember to change the file type to PDF when saving.

Online Request for Mailed Transcript

- Available on the IRS Web site at http://www.irs.gov/Individuals/Get-Transcript
- Click on "Get Transcript by Mail"
- 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 "2013".
- 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.
- IRS Tax Return Transcripts requested online cannot be sent directly to a third party by the IRS.

Telephone Request for Mailed Transcript

- Available from the IRS by calling 1-800-908-9946

Four Ways to Obtain Your 2013 IRS Tax Return Transcript

For the 2014-2015 FAFSA Award Year

- 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 "2013".

- 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.

Paper Request for Mailed Transcript—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 Financial Aid Office by the IRS. If you would like to take advantage of this option, please use the following mailing address.

  Financial Aid Office, CAPS
  1900 W. 50th St.
  Marion, IN 46953
  765-677-2516

  NOTE: It may be difficult to match a parent's or spouse's incoming IRS Tax Return Transcript to the student financial aid applicant as the names may be different. When requesting the Transcript to be sent directly to IWU, be certain to contact the Financial Aid Office 10-15 days after mailing or faxing Form 4506T-EZ to the IRS to verify receipt of the Transcript.

- On line 6, enter "2013"

- 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.

- 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.