



2019-2020 IRS Tax Return Transcript Request Process

Tax filers can request a transcript, free of charge, of their 2017 tax return from the IRS. On August 22, 2018, the IRS announced a change in the methods of distributing tax transcripts to taxpayers and their authorized third parties, such as tax practitioners. This new default transcript is issued by the IRS through all available platforms, including online, toll-free and the Transcript Delivery System used by tax professionals.

ONLINE REQUEST

The Customer File Number field for Get Transcript Online or by mail will assist those taxpayers who require a transcript for income verification purposes, such as a loan application or college financial aid. The Customer File Number is created by the requester, not the IRS. Requesters may use any 10-digit number except the taxpayer's Social Security number. Taxpayers can assign a 10-digit number to their transcript that they obtain through Get Transcript Online or Get Transcript by Mail. The Customer File Number can then serve as an identifying number on the transcript.

- Available on the IRS Web site at www.irs.gov
- In the **Tools** section of the homepage click "Get Transcript of Your Tax Records."
- Select "Get Transcript Through 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 "2017".
- Click "Continue"
- 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 mailed to an address other than the address on file with the IRS.

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. 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 "2017".

- 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 FORM – IRS FORM 4506T-EZ.

Starting September 23, 2018, the IRS introduced a revised Form 4506-T and Form 4506T-EZ, Request for Transcript, to include a new field -- line 5b -- for a Customer File Number. The Customer File Number is created by the requester, not the IRS. Requesters have the option of creating and entering an identifying number that is displayed on the transcript. The field is unique to the requester and will not be searchable by the IRS.

The requester will assign a 10-digit number, for example, a loan account number, enter it on line 5b of the Form 4506T or Form 4506T/EZ. Requesters may use any 10-digit number except the taxpayer’s Social Security number. The Customer File Number assigned by the requester will populate on the transcript, enabling the requester to match the transcript to the taxpayer.

- 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 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 “2017” to receive IRS tax information for the 2017 tax year that is required for the 2019-2020 FAFSA.
- 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 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 the IRS records, the IRS will notify the tax filer that it was not able to provide the transcript.

TAX PROFESSIONALS

Starting September 23, 2018, tax professionals with proper authorization may obtain transcripts via the e-Services Transcript Delivery Systems (TDS). Tax professionals requesting transcripts through TDS may assign a Customer File Number to the transcript. TDS users will have the option of creating and entering an identifying number that is displayed on the transcript. The field is unique to the requester and will not be searchable by the IRS.

The requester will enter a 10-digit number in the Customer File Number field on TDS. The Customer File Number assigned by the requester will populate on the transcript, enabling the requester to match the transcript to the taxpayer. Requesters may use any 10-digit number except the taxpayer's Social Security number.