**HOW TO RETREIVE YOUR TAX RETURN TRANSCRIPTS FROM THE IRS:**

Tax filers can request a transcript of their federal tax return free of charge using one of the four methods below.

**NOTE**: Please do not request to have the tax return transcript sent directly to Birmingham-Southern College because we cannot identify who the tax return transcript belongs to. Write your student ID# on each page.

***Get Transcript* Online**

*Get Transcript*is an IRS online service that provides an electronic copy of an official IRS tax return transcript.

* [***Get Transcript* by mail**](https://sa.www4.irs.gov/irfof-tra/start.do;jsessionid=5KL3zuYLdUFuohAXXGY3Oq2f) delivers transcript in 5-10 calendar days via postal mail to the address of record.
* [***Get Transcript Online***](https://sa.www4.irs.gov/eauth/pub/login.jsp?Data=VGFyZ2V0TG9BPUY%253D&TYPE=33554433&REALMOID=06-000e9548-6cd3-16f7-9748-483c0adb4007&GUID=&SMAUTHREASON=0&METHOD=GET&SMAGENTNAME=-SM-m5OrA%2b7FvbGU%2bgLgvTS4wrt26VgObWqx%2b78E5Bj5nDRoJHeUNEeLTNGiERDz%2bh%2fE&TARGET=-SM-HTTP%3a%2f%2fsa%2ewww4%2eirs%2egov%2ficce--core%2fload%2fgettrans%2fpages%2favailableTranscripts%2exhtml%3f_ga%3d1%2e268972339%2e319029263%2e1481133048)displays PDF version of transcript for users to view, print, and/or save. Additional authentication is required to establish a user account. A tax filer who is not able to successfully register for the Get Transcript Online will be able to request a tax return transcript using one of the other methods.

To use the new ***Get Transcript Online*** tool, the user must have:

1). Access to a valid email address
2). A text-enabled mobile phone (pay-as-you-go plans cannot be used) and
3). Specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan)

**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 U.S. 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 year you are requesting**.
* 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 five 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**

IRS Form [4506T-EZ](https://www.irs.gov/forms-pubs/about-form-4506) should be used instead of IRS Form 4506-T because it is sufficient to request an IRS Tax Return Transcript.

* Download at [irs.gov/pub/irs-pdf/f4506tez.pdf](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 U.S. 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. Do not use this option because our office will not be able to identify who the tax return transcript belongs to.
* On Line 6, enter **the year you are requesting**to receive IRS tax information.
* 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 five 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.

**IRS Tax Assistance Centers - In-Person Requests**

* Most IRS Taxpayer Assistance Center (TAC) has converted to appointment only service.
* TAC should not be used as a routine resource for documentation requests
* For taxpayers who still need to interact with the IRS in person:
	+ Call special toll-free number, 1-844-545-5640 to reach an IRS representative. Representatives can help resolve a tax issue or schedule an appointment at a local IRS TAC office.

**Verification of Non-Filing Letter**

1) Request a separate “Verification of Non‐Filing Letters” to match each Non‐Filing Letter requested on your Checklist (student, parent, and/or spouse).

2) Request your letter(s) by one of the following methods:

A. If the non‐filer has their own credit card account, auto loan, mortgage, home equity loan or line of credit, use the much faster “Get Transcript Online” option at [www.irs.gov/transcript](http://www.irs.gov/transcript)

B. Any non‐filers who don’t have their own credit accounts must complete this [4506-T](http://financialaid.ucmerced.edu/sites/financialaid.ucmerced.edu/files/documents/4506t.pdf) form and must fax or mail it to the IRS.

**Individuals Who Filed an Amended IRS Income Tax Return**

An individual who filed an amended IRS income tax return for the tax year 2019 must provide:

* A **2019 IRS Tax Return Transcript** (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; ***and***
* A signed copy of the 2019 IRS Form 1040X, “Amended U.S. Individual Income Tax Return,” that was filed with the IRS.

**Individuals Who Were Victims of IRS Tax-Related Identity Theft**

An individual who was the victim of IRS tax-related identity theft must provide:

* A Tax Return Data Base View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; ***and***
* A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

**Individuals Who Filed Non-IRS Income Tax Returns**

An individual who filed or will file an income tax return with the relevant taxing authority of a  U.S. territory, commonwealth, or with a foreign central government must provide:

* A transcript that was obtained at no cost from the relevant taxing authority of a U.S. territory (Guam, American Samoa, the U.S. Virgin Islands) or commonwealth (Puerto Rico and the Northern Mariana Islands), or a foreign central government, that includes all of the tax filer’s income and tax information required to be verified for tax year 2019; **or**
* If a transcript cannot be obtained at no cost from the relevant taxing authority, a signed copy of the 2019 income tax return(s).