

How to Request a Tax Return Transcript

Tax filers can request a transcript of their tax return, at no cost, from the IRS.

Online Request (PDF) Available at: www.irs.gov

- Under Tools, click “Get Transcript of Your Tax Records”.
- Click “Get Transcript Online”.
- Create an account or sign in.
- Select the reason a transcript is being requested.
- Choose the correct year under Return Transcript.
- You will then be presented with a PDF copy of your tax return transcript. Print, sign, and submit the transcript to KMBC; make sure to include the student's name on the transcript.

Online Request (by mail) Available at www.irs.gov

- Under Tools, click “Get Transcript of Your Tax Records”.
- Click “Get Transcript by Mail.”.
- Enter the tax filer's Social Security Number, date of birth, street address, and zip code. Use the address currently on file with the IRS.
- Click “Continue”.
- Select “Tax Return Transcript” and year being requested.
- 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.
- When received, submit the tax return transcript to KMBC.

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 complete 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 year being requested. Filers who amended their tax return: Select “option 4” to request both an IRS Tax Transcript and an IRS Tax Account Transcript.
- If successfully validated, tax filers can expect to receive a paper IRS Tax Transcript within 5 to 10 days from the time the IRS receives the request.
- IRS Tax Transcripts requested by telephone cannot be sent directly to a third party by the IRS.

Paper Request Form – IRS Form 4506T

- IRS Form 4506T may be used to request an IRS Tax Transcript. NOTE: Do not confuse with Form 4506 which is used to request an original copy of the tax return and requires a fee for processing.
- Download at <http://www.irs.gov/pub/irs-pdf/f4506.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 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 Transcript mailed directly to a third party by the IRS. KMBC asks that you do not have the IRS Tax Transcript mailed directly to us from the IRS since the transcript may be difficult to match with the student. When you receive the Tax Transcript, clearly write the name of the student being verified on the top of the transcript before mailing, faxing, or sending by email to KMBC's Financial Aid Office.
- On line 6, enter the year of the transcript being requested. Check box 6a, on the right, to request Return Transcript.
- Filers who amended their tax return must also check box 6b, on the right, to request an 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 4506T to the appropriate address (or fax number) provided on page 2 of Form 4506T
- 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 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.
- Non-tax filers required to verify that they did not file a tax return may use Form 4506T and check box 7. Current year requests are available after June 15th.