

IRS Tax Return Transcript Request Instructions

Tax filers can request *one* transcript, free of charge, of their tax return from the IRS in one of three ways. The IRS will only send *one* transcript for a requested year – please make a copy of the transcript for your records before submitting to NUHS. *For all amended tax return filers:* You must submit *both* an IRS Tax Return Transcript and and IRS Tax Account Transcript (see last page) - if you have filed an amended tax return for a year.

Order a Tax Return Transcript

1. Available on the IRS Web site at www.irs.gov
2. Under **Tools** of the homepage click “Get Transcript of Tax Records”
3. Select either ONLINE or MAIL options and follow instructions. Below steps are for MAIL option.
 - 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 the year for the tax return in the **Tax Year** field.
 - 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.
4. IRS Tax Return Transcripts requested online cannot be sent directly to a third party by the IRS – instead use Form 4506T-EZ below.

Telephone Request

1. Available from the IRS by calling 1-800-908-9946
2. 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.
3. Select “**Option 2**” to request an IRS Tax Return Transcript and then enter the 4-digit tax year.
4. 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.
5. IRS Tax Return Transcripts requested by telephone cannot be sent directly to a third party by the IRS – instead use Form 4506T-EZ below.

Send To Third Party (NUHS) Request Form – IRS Form 4506T-EZ

1. IRS Form 4506T-EZ should be used instead of IRS Form 4506-T because it is sufficient to request an IRS Tax Return Transcript to send to a third party.
2. Download at <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf>
3. 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.

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. If you wish to have the form sent directly to NUHS, please enter the address below. *NOTE: dependent undergraduate students with different last names than parents are not to use this option, as we may not be able to match student/parent records.*

ATTN: Financial Aid Office
National University of Health Science
200 E. Roosevelt Road
Lombard, IL 60148
630-889-6518

5. On line 6, enter the 4-digit tax year to receive IRS tax information for the tax year that is required for the completing the FAFSA (i.e. 2012 for the 2013-14, etc.).
6. 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.
7. Mail or fax the completed IRS Form 4506T-EZ to the appropriate address (or FAX number) provided on page 2 of Form 4506T-EZ. ***Make a copy for your records!***
8. 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.

Amended Tax Return Filers – Requesting a Tax Account Transcript

1. IRS Form 4506-T should be used to request an IRS Tax Account Transcript.
2. Download at <http://www.irs.gov/pub/irs-pdf/f4506t.pdf>.
3. 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.
4. If you want the Account transcript mailed directly to a third party from the IRS, enter the third-party information on Line 5 (see NUHS address above).
5. On part 6, check option **“b. Account Transcript”**.
6. 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.
7. Mail or fax the completed IRS Form 4506-T to the appropriate address (or FAX number) provided on page 2 of Form 4506T-EZ.
8. **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 4506-T 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.

Please Note: Requested tax transcripts will not be received until after the tax return has been processed. Electronically filed tax returns will take approximately **1-2 weeks to process after the return has been filed**. Paper filed tax returns will take approximately **6-8 weeks to process after the return has been filed**.