

How to Request a Tax Return Transcript, 2018-19

Tax filers can request a transcript of their 2016 tax return, free of charge, from the IRS in one of three ways:

- Online
- By Telephone
- By Paper

Online Request

Available at www.irs.gov

- Click on "**Get My Tax Record**"
- Click "**Get Transcript Online**" (If at any point, you cannot validate your identity – for example, you cannot provide financial verification information or you lack access to a mobile phone – you may use Get Transcript by Mail, see below)
- Follow instructions for creating an account or log in.
- Select "**Tax Return Transcript**" (not "Tax Account Transcript") and in the Tax Year field, select "**2016**".
- Sign and submit the tax return transcript to MSU; make sure to include the student's name and school ID number on the transcript.

OR

- Click on "**Get My Tax Record**"
- Click "**Get Transcript by Mail**"
- Follow instructions.
- Select "**Return Transcript**" (not "Account Transcript") and in the Tax Year field, select "**2016**".
- 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.
- Submit the tax return transcript to MSU; make sure to include the student's name and school ID number on the transcript.

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.
- Select "**Option 2**" to request an IRS Tax Return Transcript (not "Tax Account Transcript") and then enter "**2016**".
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address provided in their telephone request within 5 to 10 days from the time of the request.
- IRS Tax Return Transcripts requested by telephone cannot be sent directly to a third party by the IRS.
- Submit the tax return transcript to MSU; make sure to include the student's name and school ID number on the transcript.

Paper Request Form – IRS Form 4506T-EZ

Download IRS Form 4506T-EZ at <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf>

- Complete lines 1 – 4, following the instructions on page 2 of the form, use blue or black ink.
- Line 3: enter the tax filer's street address and zip or postal code. Use the address currently on file with the IRS.
- Line 5 provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS.
- Line 6: in the Tax Year field, **enter "2016"**.
- The tax filer must sign and date the form and enter their telephone number. Only one signature is required when requesting a joint tax return transcript.
- The IRS will not process a transcript request if you cross out any error that you made when filling out the Tax Transcript Request; instead print out a new request and return the properly completed and signed to the IRS.
- Mail or fax the completed IRS Form 4506T-EZ to the address (or FAX number) provided on page 2 of Form 4506T-EZ.
- If the 4506T-EZ information is successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address provided on their request within 5 to 10 days.
- Submit the tax return transcript to MSU; make sure to include the student's name and school ID number on the transcript.

MAIL

Minot State University
Attn: Financial Aid Office
500 University W
Minot, ND 58707

FAX (701) 858-4310

EMAIL Amanda.Allard@minotstateu.edu

How to fix address matching problems when ordering online

When entering the information into the IRS address matching system note the following:

- The address entered must match the address already on file with the IRS exactly.
- The address on file is typically the address on your most recent tax return.
- Spelling out the word "street" rather than using the abbreviation "st." can be enough to cause an error.
- Addresses on the IRS system are auto-corrected through a post office program and may not match what you put on your tax return.

We suggest the following if you run into problems:

- Have your taxes in front of you and enter the address carefully as it is on your return.
- If you entered your address as it appears on your return and it doesn't work, try using the standardized version of your address.
-To get a **standardized version of your address**: 1) go to www.usps.com 2) Click Look Up a Zip Code 3) Enter Street Address, City, State 4) Click Find
- If you still have problems, the IRS.gov Website Help Desk can be reached toll-free at 1-800-876-1715, Monday - Friday 8:00 a.m. - 8:00 p.m.

Tax Filers with Special Circumstances

Individuals Granted a Filing Extension by the IRS - Provide the following:

- a copy of IRS Form 4868 that was filed with the IRS for the tax year;
- a copy of the IRS's approval of an extension beyond the automatic six-month extension (if applicable);
- a copy of W-2 forms for **each** source of employment income received for the tax year and, if self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for the tax year; **and**
- documentation from the IRS dated on or after October 1, 2017 that indicates a 2016 income tax return was not filed.

Individuals Who Filed an Amended IRS Income Tax Return - Provide a copy of the IRS tax return transcript **and** a signed copy of the IRS Form 1040X.

Individuals Who Were Victims of Tax Administration Identity Theft - Call the IRS at 1-800-908-4490.

Individuals Who Filed Non-US Income Tax Returns - Provide a signed copy of that income tax return(s); **or** a transcript obtained from a government of a U.S. territory or commonwealth, or a foreign central government that includes all of the tax filer's income and tax information required to be verified for the tax year.