

# Walden University

## IRS Tax Return Transcript Request Process

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Tax filers (including victims of IRS tax-related identity theft) can request from the Internal Revenue Service (IRS) an IRS Tax Return Transcript of their 2015 IRS tax return information, free of charge, in several ways.

Under all methods, when requesting a transcript, tax filers need to provide their Social Security Number (SSN), date of birth, their street address, and ZIP Code as is currently on file with the IRS. Generally, this is the address included on the latest tax return filed with the IRS. However, if an address change was made either with the IRS or with the U.S. Postal Service, the IRS may have the updated address on file. If this is the case use the updated address.

**Joint Tax Return** - When requesting a transcript using the electronic processes described below, use the primary tax filer's information (e.g., SSN). When requesting a transcript using the paper process described below, either spouse may submit the request and only one signature is required.

*In most cases, for electronic tax return filers, 2015 IRS income tax information is available for the IRS Tax Return Transcript within 2-3 weeks after the 2015 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2015 paper IRS income tax returns, the 2015 IRS income tax return information is available for the IRS Tax Return Transcript within 6-8 weeks after the 2015 paper IRS income tax return has been received by the IRS. Requests for documents mailed or faxed to the IRS normally take 5-10 business days to process upon receipt.*

### **TAX FILERS**

#### **Online Request - Get Transcript ONLINE**

- Go to the IRS website ([www.irs.gov](http://www.irs.gov))
- Under the "Tools" section, select the link "Get Transcript for your Tax Records"
- Select the option to "Get Transcript ONLINE". Be sure to disable pop-up blockers.
- Sign in or create an account (you will be asked for your Social Security number, date of birth, and address as it appears on the most recent tax return filed with the IRS). Next you will need to answer a series of credit-based security questions\*
- In the "Type of Transcript" field, choose "Return Transcript" and select the tax year 2015
- Click "Continue"
- A confirmation message will appear
- Save and/or print your Return Transcript for your records
- Forward a copy of your IRS tax transcript to the Office of Financial Aid

\* If you are not able to successfully register for the Get Transcript Online, you will be able to request a tax return transcript using one of the other methods mentioned below

#### **Online Request - Get Transcript by MAIL**

- Go to the IRS website ([www.irs.gov](http://www.irs.gov))
- Under the "Tools" section, select the link "Get Transcript for your Tax Records"
- Select the option to "Get Transcript by MAIL" Be sure to disable pop-up blockers.
- Sign in or create an account (you will be asked for your Social Security number, date of birth, and address as it appears on the most recent tax return filed with the IRS).
- In the "Type of Transcript" field, choose "Return Transcript" and select the tax year 2015
- Click "Continue"
- Upon receipt, forward a copy of your IRS tax transcript to the Office of Financial Aid

## **Paper Request Form – IRS Form 4506T-EZ, Short Form Request for Individual Tax Return Transcript**

- Download a PDF for the 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.
- 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 IRS Tax Return Transcript from the IRS. Third parties should provide specific address information including a room #, ATTN lines, names, etc. so that the transcript is delivered to the appropriate person/office. The IRS will send the transcript only to the address listed on Line 5. The IRS will not mail a copy of the transcript to the tax filer, nor will the tax filer receive notification that the transcript was sent to the designated third party. If you choose to have your transcript sent directly to Walden University, please enter the following information:

**Walden University  
Office of Financial Aid  
7065 Samuel Morse Drive  
Columbia, MD 21046  
1-800-925-3368**

***PLEASE NOTE:** Walden University may have difficulty matching a parent's incoming IRS Tax Return Transcript to the aid applicant, as the two names may be different. This may also apply to a married applicant that files separately from their spouse since the spouse's transcript will not show the aid applicant's information. Please keep this in mind when determining whether or not to have your transcript sent to Walden University directly.*

- On line 6, enter "2015" to receive tax information for the 2015 tax year that is required for 2017-2018 FAFSA® verification.
- The tax filer must sign and date the form and enter their telephone number. Sign the IRS Form 4506T-EZ exactly as your name appeared on the original tax return. If you changed your name prior to submitting your tax return, also sign your current name.
- Mail or fax the completed IRS Form 4506T-EZ to the appropriate address (or FAX number) provided on page 2 of IRS Form 4506T-EZ.
- Tax filers can expect to receive their IRS Tax Return Transcript within 10 business days from the time the IRS receives and processes their signed request. However, if a third party is identified on line 5, the third party can expect to receive the tax filer's IRS Tax Return Transcript within 10 business days from the time the IRS receives and processes the signed request.

***NOTE:** If any information does not match IRS records, the IRS will notify the tax filer that it was not able to provide the transcript.*

## **Paper Request Form – IRS Form 4506-T, Request for Transcript of Tax Return**

- Download a PDF for the 4506-T at <http://www.irs.gov/pub/irs-pdf/f4506t.pdf>.
- Complete lines 1 – 4, following the instructions on page 2 of the form.
- Line 5 provides tax filers with the option to have their IRS Tax Return Transcript or IRS Record of Account 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 IRS Tax Return Transcript or IRS Record of Account from the IRS. Third parties should provide specific address information including a room #, ATTN lines, names, etc. so that the transcript is delivered to the appropriate person/office. The IRS will send the transcript only to the address listed on Line 5. The IRS will not mail a copy of the transcript to the tax filer, nor will the tax filer receive notification that the transcript was sent to the designated third party. If you choose to have your transcript sent directly to Walden University, please enter the following information:

**Walden University  
Office of Financial Aid  
7065 Samuel Morse Drive  
Columbia, MD 21046  
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***PLEASE NOTE:** Walden University may have difficulty matching a parent's incoming IRS Tax Return Transcript to the aid applicant, as the two names may be different. This may also apply to a married applicant that files separately from their spouse since the spouse's transcript will not show the aid applicant's information. Please keep this in mind when determining whether or not to have your transcript sent to Walden University directly.*

- On line 6, enter the tax form number that is being requested (1040, 1040A, 1040EZ, etc.) and then check box (a) Return Transcript. Only one tax form number can be used per request.
- On line 9, enter “12/31/2015” to receive IRS tax information for the 2015 tax year that is required for 2017-2018 FAFSA® verification.
- The tax filer must sign and date the form and enter their telephone number. Sign the IRS Form 4506-T exactly as your name appeared on the original tax return. If you changed your name after submitting your tax return, also sign your current name.
- Mail or fax the completed IRS Form 4506-T to the appropriate address (or FAX number) provided on page 2 of IRS Form 4506-T.
- Tax filers can expect to receive their IRS Tax Return Transcript or IRS Record of Account within 10 business days from the time the IRS receives and processes the completed and signed 4506-T request. However, if a third party is identified on line 5, the third party can expect to receive the tax filer’s IRS Tax Return Transcript within 10 business days from the time the IRS receives and processes the signed request.

*NOTE: If any information does not match IRS records, the IRS will notify the tax filer that it was not able to provide the transcript.*

### **Telephone Request**

- Available from the IRS by calling 1-800-908-9946.
- To continue in English press 1.
- Tax filers must follow prompts to enter their Social Security number and the numbers in their street address
- Select “**Option 2**” to request an IRS Tax Return Transcript and then enter “**2015.**”
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their telephone request within 5 to 10 business days from the time the IRS receives the request.
- IRS Tax Return Transcripts requested by telephone cannot be mailed to an address other than the address on file with the IRS.

### **Victims of IRS Tax-Related Identity Theft**

A victim of IRS identity theft who is not able to obtain a 2015 IRS Tax Transcript must still complete the verification process.

Tax filers may obtain a TRDBV transcript and inform the IRS of the tax-related identity theft by calling the IRS’s Identity Protection Specialized Unit (IPSU) at 1-800-908-4490. The IPSU will first authenticate the identity of the tax filer, who can then ask the IRS to mail them a 2015 TRDBV transcript.