

IRS Tax Return Transcript Request Process

The quickest and easiest way to provide William Peace University with your IRS Tax Information is by using the DATA Retrieval Tool (DRT) on your Free Application for Federal Student Aid (FAFSA). Log into your FAFSA at www.FAFSA.ed.gov with your assigned PIN#, DO NOT MAKE ANY CHANGES to original data, just opt to use the DRT. A successful DRT submission eliminates the need to contact the IRS for a tax transcript.

**If the DRT is not successful or if you are unable to use the DRT option there are several ways you can request your 2014 TAX TRANSCRIPT from the IRS.

- I. Transcript on Demand
 - a. Available at <http://www.irs.gov/Individuals/Get-Transcript>
 - i. Select the Get Transcript ONLINE
 - ii. You will need to create an account if you haven't done so already
 - Provide your First Name, Last Name, & Email-select retrieve confirmation code
 - The IRS will e-mail you a code and place in the confirmation code box-select verify email confirmation code
 - Verify information and place your SSN, DOB, Filing status, Country, Address (as it appears on your tax return), & phone number (optional)-Select box (if you want information to save for future use) & continue
 - Answer the questions in step 4 properly-Select continue
 - On the Get Transcript Page select why you are requesting the transcript (Higher Education/Student Aid), Select the year you wish to have for the return transcript (2014)
 - Once you select the year (2014) your Tax Transcript will appear in the web browser, print, & provide it to the Office of Financial Aid.
- II. Online Request
 - a. Available at www.irs.gov
 - i. On homepage Tools section click, "Get Transcript of Your Tax Records" (IF amended return completed, and Account Transcript is requested.)
 - Select Get Transcript by MAIL
 - If you filed jointly with your spouse, tax account data is listed under the SSN of the primary taxpayer. The primary taxpayer is the person listed first on the tax return
 - Provide the tax filer's SSN, DOB, Street Address (as it appears on your tax return), and zip or postal code-Select continue
 - In TYPE of Transcript filed, select "Return Transcript" and in Tax Year field, select 2014

- If validated, tax filers can expect a paper return transcript at the address included in their online request within 5-10 days. IRS Tax Return Transcripts requested online cannot be sent directly to a third party by the IRS
- III. Telephone Request
- a. Dial 1-800-908-9946
- i. Tax filers must follow prompts in entering their SSN and street address (as it appears on your tax return)
- Select “option 2” to request an IRS Tax Return Transcript
 - Enter “2014”
 - If validated, tax filers can expect to receive a paper IRS Return Transcript at the address used in their telephone request. IRS Tax Return Transcripts requested by telephone cannot be sent direct to a third party by the IRS.
- IV. Paper Request Form- IRS Form 4507 T-EZ
- a. IRS Form 4506 T-EZ should be used instead of Form 4506-T
- i. Download at <http://irs.gov/pub/irs-pdf/f4506tez.pdf>. Complete lines 1-4 following instructions listed on page 2. Line 3 should be the most current address on file with the IRS. This is the address that appears on the Tax Return you submitted. **NOTE:** If the address recently changed, include the address listed on the last tax return filed on line 4
- ii. Line 5 provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS. This is where you can list our information and have it sent directly to us at: William Peace University, 15 East Peace St, Raleigh, NC 27604. Our phone number is 919-508-2214
- iii. On line 6 enter the tax year “2014” 2014 taxes are required for the 2015-2016 FAFSA. 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
- iv. Mail or fax the completed the IRS Form 4506T-EZ to the appropriate address (for Fax number) provided on page 2. Tax filers can expect to receive their transcript within 5-10 days after the IRS received and process their signed request. **NOTE:** Processing for 4506T-EX 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