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How to Request an IRS Tax Return Transcript

Available Options:

Option 1: IRS Form 4506-T **Option 2:** Online Request – Online or Mail **Option 3:** Telephone Request

Option 4: Schedule appointment at local IRS Office **Option 5:** Transcript for Identity Theft Victim

**If you filed an amendment to your taxes (1040X) or a tax extension (4868), please contact the Financial Aid Department.

After you receive the IRS Tax Return Transcript:

- Write your name and NWTC Student ID #.
- Keep a copy for your records.
- Submit the IRS Tax Return Transcript to the Financial Aid Office.

Option 1: IRS Form 4506-T

- Print IRS Form 4506-T.
- Lines 1 – 4: enter name, social security number, address.
- Line 3: enter street address and zip or postal code. Use the address currently on file with the IRS, if previously filed taxes.
- Line 5b: Enter your student ID number
- Line 6a: Select the checkbox on the right hand side for Return Transcript.
- Line 8 (optional): Select the checkbox on the right hand side for Wage Transcript (W2s).
- Line 9: Year or period requested field, enter 12/31/20XX.
- Check the box above SIGN HERE.
- Sign and date the form and enter your telephone number.
- Mail or fax the completed IRS Form 4506-T, provided on page 2 of form 4506-T.
- If the form 4506-T information is successfully validated, you can expect to receive your IRS Tax Return Transcript at the address provided within 10 to 15 days.

Form **4506-T**
(June 2019)
Department of the Treasury
Internal Revenue Service

Request for Transcript of Tax Return
▶ **Do not sign this form unless all applicable lines have been completed.**
▶ **Request may be rejected if the form is incomplete or illegible.**
▶ **For more information about Form 4506-T, visit *www.irs.gov/form4506t*.**

OMB No. 1545-1872

Tip. Use Form 4506-T to order a transcript or other return information free of charge. See the product list below. You can quickly request transcripts by using our automated self-help service tools. Please visit us at IRS.gov and click on "Get a Tax Transcript..." under "Tools" or call 1-800-908-9946. If you need a copy of your return, use **Form 4506, Request for Copy of Tax Return.** There is a fee to get a copy of your return.

1a Name shown on tax return. If a joint return, enter the name shown first.
YOUR NAME

1b First social security number on tax return, individual taxpayer identification number, or employer identification number (see instructions)
YOUR SOCIAL SECURITY NUMBER

2a If a joint return, enter spouse's name shown on tax return.
YOUR SPOUSE (IF APPLICABLE)

2b Second social security number or individual taxpayer identification number if joint tax return
SPOUSE SOCIAL SECURITY NUMBER

3 Current name, address (including apt., room, or suite no.), city, state, and ZIP code (see instructions)
YOUR CURRENT ADDRESS

4 Previous address shown on the last return filed if different from line 3 (see instructions)
PREVIOUS ADDRESS (IF APPLICABLE)

5 Customer file number (if applicable) (see instructions)
YOUR STUDENT ID NUMBER

Note: Effective July 2019, the IRS will mail tax transcript requests only to your address of record. See **What's New** under **Future Developments** on Page 2 for additional information.

6 **Transcript requested.** Enter the tax form number here (1040, 1065, 1120, etc.) and check the appropriate box below. Enter only one tax form number per request. ▶

a **Return Transcript,** which includes most of the line items of a tax return as filed with the IRS. A tax return transcript does not reflect changes made to the account after the return is processed. Transcripts are only available for the following returns: Form 1040 series, Form 1065, Form 1120, Form 1120-A, Form 1120-H, Form 1120-L, and Form 1120S. Return transcripts are available for the current year and returns processed during the prior 3 processing years. Most requests will be processed within 10 business days . . . . . . ☒

b **Account Transcript,** which contains information on the financial status of the account, such as payments made on the account, penalty assessments, and adjustments made by you or the IRS after the return was filed. Return information is limited to items such as tax liability and estimated tax payments. Account transcripts are available for most returns. Most requests will be processed within 10 business days . ☐

c **Record of Account,** which provides the most detailed information as it is a combination of the Return Transcript and the Account Transcript. Available for current year and 3 prior tax years. Most requests will be processed within 10 business days . . . . . . ☐

7 **Verification of Nonfiling,** which is proof from the IRS that you **did not** file a return for the year. Current year requests are only available after June 15th. There are no availability restrictions on prior year requests. Most requests will be processed within 10 business days . . ☐

8 **Form W-2, Form 1099 series, Form 1098 series, or Form 5498 series transcript.** The IRS can provide a transcript that includes data from these information returns. State or local information is not included with the Form W-2 information. The IRS may be able to provide this transcript information for up to 10 years. Information for the current year is generally not available until the year after it is filed with the IRS. For example, W-2 information for 2016, filed in 2017, will likely not be available from the IRS until 2018. If you need W-2 information for retirement purposes, you should contact the Social Security Administration at 1-800-772-1213. Most requests will be processed within 10 business days . ☐

Caution: If you need a copy of Form W-2 or Form 1099, you should first contact the payer. To get a copy of the Form W-2 or Form 1099 filed with your return, you must use Form 4506 and request a copy of your return, which includes all attachments.

9 **Year or period requested.** Enter the ending date of the year or period, using the mm/dd/yyyy format. If you are requesting more than four years or periods, you must attach another Form 4506-T. For requests relating to quarterly tax returns, such as Form 941, you must enter each quarter or tax period separately. 12 / 31 / 20XX | / / | / / | / /

Caution: Do not sign this form unless all applicable lines have been completed. *USE TAX YEAR AS REQUESTED ON FAFSA*

Signature of taxpayer(s). I declare that I am either the taxpayer whose name is shown on line 1a or 2a, or a person authorized to obtain the tax information requested. If the request applies to a joint return, at least one spouse must sign. If signed by a corporate officer, 1 percent or more shareholder, partner, managing member, guardian, tax matters partner, executor, receiver, administrator, trustee, or party other than the taxpayer, I certify that I have the authority to execute Form 4506-T on behalf of the taxpayer. **Note:** This form must be received by IRS within 120 days of the signature date.

☐ **Signatory attests that he/she has read the attestation clause and upon so reading declares that he/she has the authority to sign the Form 4506-T.** See instructions.

Phone number of taxpayer on line 1a or 2a
PHONE NUMBER

Sign Here

▶ YOUR SIGNATURE | DATE
Signature (see instructions) | Date

▶ Title (if line 1a above is a corporation, partnership, estate, or trust)

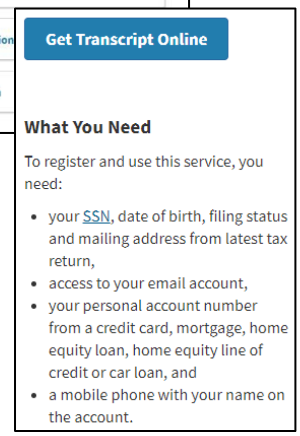
▶ Spouse's signature | Date

For Privacy Act and Paperwork Reduction Act Notice, see page 2. Cat. No. 37667N Form **4506-T** (Rev. 6-2019)

Option 2: Online Request

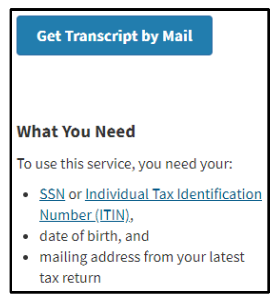
- Available at www.irs.gov.
- Under Tools, click "Get Your Tax Record".

Transcript Online



- Click "Get Transcript Online".
- Enter your social security number, email address, filing status, account numbers for loan or credit card associated with your name, and mobile phone associated with your name.
- Click "Continue".
- Select "Return Transcript" and in the Tax Year field, select "20XX".
  - For Customer File Number, enter Student ID number
- If successfully validated, you will be able to view and print your IRS Tax Return Transcript

Transcript by Mail



- Click "Get Transcript by Mail".
- Enter your Social Security Number, Date of Birth, Street Address, Zip Code.
- Click "Continue".
- Select "Return Transcript" and in the Tax Year field, select "20XX".
  - For Customer File Number, enter Student ID number
- If successfully validated, you will receive your IRS Tax Return Transcript to the address provided within 5 to 10 days.

Option 3: Telephone Request

- Call 1-800-908-9946.
- Follow prompts to enter social security number and the numbers in street address.
- Select "Option 2" to request an IRS Tax Return Transcript, then enter "20XX".
- If successfully validated, you will receive your IRS Tax Return Transcript to the address provided within 5 to 10 days.

Option 4: Schedule appointment at local IRS Office

- Call 1-844-545-5640. You will need a photo ID for your appointment.
- For a list of locations: www.irs.gov/help/contact-my-local-office-in-wisconsin.

Option 5: Transcript for Identity Theft Victim

- Call 1-800-908-4490.
- If successfully validated, you will receive your Transcript DataBase View (TDBV) to the address provided within 10 to 15 days.