

CONCORDIA UNIVERSITY

WISCONSIN & ANN ARBOR

How to Request an IRS Tax Transcript

REQUESTING TRANSCRIPTS THROUGH IRS WEBSITE

1. **LOG ON:** <https://www.irs.gov/Individuals/Get-Transcript>
 - a. Select the “Get Transcript ONLINE” button or “Get Transcript by MAIL”
 - b. **Transcript Online Instructions:**
 - i. This allows students to immediately receive a PDF of their tax return transcripts
 - ii. Request the “IRS Tax Return Transcript” **NOT** “IRS Tax Account Transcript”
 - iii. Transcript will display online upon successful completion of the IRS’s two-step authentication
 - iv. Once you have received your Tax Transcript, print, sign, date, and submit it to the Financial Aid Office
 - c. **Transcript by Mail Instructions:**
 - i. Visit: <https://www.irs.gov/Individuals/Get-transcript>
 - ii. Click on “Get Transcript by Mail” icon
 - iii. Enter the requested information and click “Continue”
 - iv. Select “Return Transcript” for the Type of Transcript, select the tax year in question, and click “Continue”
 - v. If successfully validated, tax filers will receive a paper IRS Tax Return Transcript within 10 business days
 - vi. Once you have received your Tax Transcript, sign, date, and submit it to the Financial Aid Office

REQUESTING TRANSCRIPTS BY PHONE

1. Call the IRS at 1-800-908-9946
2. Follow prompts to enter the primary tax filer’s social security number and address
3. Select “Option 2” to request an IRS Tax Return Transcript and then enter the appropriate tax year
4. If successfully validated, tax filers will receive a paper IRS Tax Return Transcript within 10 business days
5. Once you have received your Tax Transcript, sign, date, and submit it to the Financial Aid Office

REQUESTING TRANSCRIPTS BY PAPER:

1. Download the IRS Form 4506T-EZ
2. Complete lines 1-4
 - a. Do not have the form mailed to Concordia. It must be mailed to the address on file for the tax-filer
3. The tax filer (or spouse if requesting information from a joint tax return) must sign and date the form and enter their telephone number
4. Once completed, mail or fax the completed form to the appropriate address on page 2 of the 4506T-EZ form
5. Once you have mailed your form and received your Tax Transcript by mail, sign, date, and submit it to the Financial Aid Office