

IRS Tax Return Transcript Request Process – Other Methods 2018-2019

OFFICE OF FINANCIAL AID WINTHROP UNIVERSITY

Tax filers can request a transcript, free of charge, of their 2016 tax return from the IRS. Winthrop prefers that you send us your tax information by using the *Data Retrieval Tool* through the Free Application for Federal Student Aid (FAFSA) or by getting an online pdf of your return transcript from the IRS. You can find directions for both of these methods at <http://www.winthrop.edu/finaid/howto>. If neither method will work, the following methods can also be used:

Tax filers can request a transcript, free of charge, of their 2016 tax return from the IRS.

Online Request (Mailed Transcript)

- Available on the IRS Web site at <http://www.irs.gov/Individuals/Get-Transcript>
- Click **Get Transcript by Mail** button
- Enter the tax filer's Social Security Number, date of birth, street address, and zip code. Use the address currently on file with the IRS. Generally this will be the address that was listed on the latest tax return filed. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- Click **Continue**
- In the **Type of Transcript** field, select "**Return Transcript**" and in the **Tax Year** field, select "**2016**"
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address used on the tax return within 5 to 10 days from the time the on-line request was successfully transmitted to the IRS.
- Once you receive the IRS Return Transcript, please write student's Winthrop ID on each page and submit a copy to the Office of Financial Aid.

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 were listed on the latest tax return filed. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- Select "**Option 2**" to request an IRS Tax Return Transcript and then enter "**2016**"
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address listed on the tax return within 5 to 10 days from the time the IRS receives the request.

- Once you receive the IRS Return Transcript, please write student's Winthrop ID on each page and submit a copy to the Office of Financial Aid.

Paper Request Form – IRS Form 4506T-EZ

- Download IRS Form 4506T-EZ (Short Form Request for Individual Tax Return Transcript) from <https://www.irs.gov/pub/irs-pdf/f456tez.pdf>. Complete lines 1 – 4.
- Line 5 (optional) - provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS to: Winthrop University, Office of Financial Aid, Sykes House, 638 Oakland Ave, Rock Hill, SC 29733; 803-323-2189.
- On line 6, enter “**2016**” as the year requested.
- The tax filer (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 for a joint return.
- Mail or fax, the completed IRS Form 4506T-EZ to the appropriate address or fax number provided on page 2 of Form 4506T-EZ.
- Tax filers can expect to receive their transcript within 5 to 10 days from the time the IRS receives and processes their signed request. When processing Form 4506T-EZ, information provided on the form must be verified. The IRS will notify the tax filer if a transcript cannot be provided due to discrepant information.