

IRS Tax Return Transcript Instructions-2018

You may request a tax return transcript from the IRS several ways. These instructions will cover the three ways that you can request your tax return transcript.

Starting 9/23/18, the IRS will redact (black out) personally identifiable information from all tax documents. Be sure to write the student's name and ID on any verification of non-filing letter or tax transcript.

Requesting your transcript online

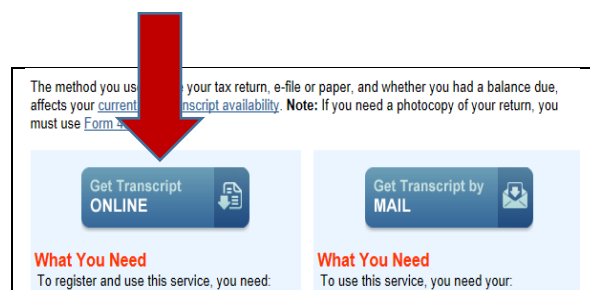
What do I need?

Before you begin, you will need to gather the following information:

- First and Last name that was used on your tax return
- Social Security Number or Individual Taxpayer Identification Number (ITIN)
- Date of Birth
- Email Address (that can be accessed immediately)
- Mobile Phone (that can be accessed immediately and associated with your name; pre-paid phones and landlines will not work)
- Account information for one of the following:
 - Credit Card
 - Mortgage or Home Equity Loan
 - Home Equity Line of Credit
 - Auto Loan
 - Student Loan ID number

How do I request my transcript?

1. Go to www.irs.gov/individuals/get-transcript.
2. Click on Get Transcript ONLINE.
3. Log in as a returning or first time user.
 - If you are a first time user, follow the instructions to register your account.
 - You will be asked to verify your email address, your phone number and a financial account number. In addition, you will be asked to create a username and password.
4. When you are asked the reason that you need a transcript, select "Higher Education/Student Aid".
5. Select 2018 under the Return Transcript category.
6. Save and/or print your tax return transcript.

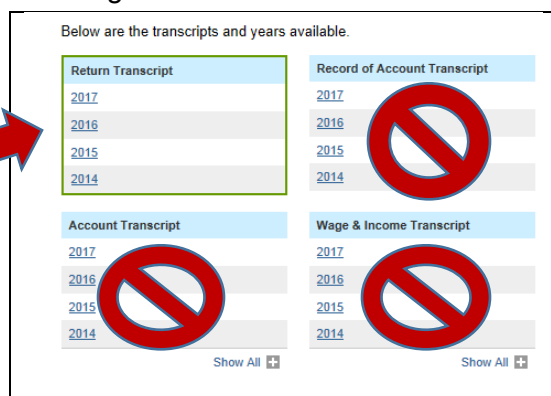


Requesting your transcript by mail

What do I need?

Before you begin, you will need to gather the following information:

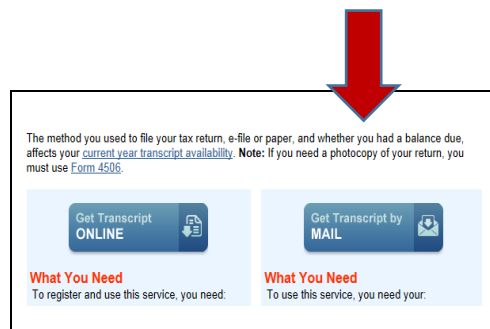
- First and Last Name that was used on your tax return
- Social Security Number or Individual Taxpayer Identification Number (ITIN)
- Date of Birth



- Mailing address from your latest tax return

How do I request my transcript?

1. Go to www.irs.gov/individuals/get-transcript.
2. Click on Get Transcript by MAIL.
3. Complete required information, click continue
4. When you are asked the type of transcript, select “Return Transcript” for Tax Year “2018”. **Do not** choose Account Transcript.
5. Your transcript takes 5 to 10 business days to be processed and delivered to the address that is on file with the IRS.



Requesting a transcript using IRS form 4506-T

What do I need?

Before you begin, you will need to gather the following information:

- First and Last Name that was used on your tax return
- Social Security Number or Individual Taxpayer Identification Number (ITIN)
- Mailing address from your latest tax return
- Type of return filed (1040, 1040A, 1040EZ)

How do I request my transcript?

1. Print IRS Form 4506-T from here: <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>.
2. Complete the appropriate sections 1 to 4. **Do not** complete section. **Be sure to print legibly!**

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. ▶ <input type="text" value="1040"/>
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 <input checked="" type="checkbox"/>

3. For section 6, enter the return that you filed in 2018. Then select Return Transcript.
4. **Do not check boxes for sections 7 and 8.**
5. For section 9, enter the 12/31/2018.

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.
	<input type="text" value="12"/> / <input type="text" value="31"/> / <input type="text" value="2018"/> / / / / / /

Caution: Do not sign this form unless all applicable lines have been completed.

6. Sign and date the form.
7. Mail or fax to the appropriate IRS office. (found on page 3 of form 4506-T)
8. Once received by the IRS, your transcript takes 5 to 10 business days to be processed and delivered to your address that is on file with the IRS.
9. Once you receive it, please submit to our office. Verification cannot be completed unless you submit the form to our office.