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How Do I Get My Tax Transcript?

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The IRS reminds taxpayers to plan ahead and take advantage of other options to obtain a tax transcript while work continues to bring the viewable/printable functionality of the Get Transcript application back online in the near future with enhanced identity protection security features.

In the meantime, taxpayers don't have to wait. They can order their transcript online, over the phone or by mail — the quickest options available. If they plan ahead, they should receive their transcript within five to 10 days from the time the IRS receives the request online.

Here are some tips for fast service:

- To order a transcript online and have it delivered by mail, go to IRS.gov and use the Get Transcript tool. Simply click the "Get Transcript by Mail" button.
- To order by phone, call 800-908-9946 and follow the prompts.
- To request an individual tax return transcript by mail or fax, complete Form <u>4506T-EZ</u>, Short Form Request for Individual Tax Return Transcript. Businesses and individuals who need a tax account transcript should use Form 4506-T, Request for Transcript of Tax Return.
- Keep in mind that the current year's transcript availability is affected by the method used to • file the return and whether the return includes a refund or balance due. Taxpayers should use this chart to determine when they can order a transcript.
- A tax return transcript shows most line items from the tax return that the taxpayer filed as • well as changes that were made during processing, such as math error corrections. It also includes items from any accompanying forms and schedules filed with the tax return. It doesn't reflect any amended returns or adjustments to tax made after the taxpayer filed their original return.
- A tax account transcript includes marital status, the type of return filed, adjusted gross income and taxable income. It also includes a record of tax payments, refunds, penalty and interest charges and adjustments to tax made after the original return was filed.
- If the taxpayer needs an exact copy of their original or amended tax return, there a charge of \$50 for each return/year requested. They should complete Form 4506, Request for Copy of Tax Return, to make the request. Mail it to the IRS address listed on the form for their area. Copies are generally available for the current year and past six years. Taxpayers should allow 75 days for delivery.

• The IRS will mail the transcript to the address of record entered on the prior year's tax return. The mailed transcript is an official document. It does not need to be a "certified" copy as is the case with some other documents. If a taxpayer has moved since they last filed a tax return with the IRS, they need to first submit a Form 8822, the Change of Address form, to ensure that the transcript is mailed to the correct address. Allowing time for the Form 8822 is another reason for taxpayers to plan ahead for their transcript needs.

Mortgage Applicants. If you are applying for a mortgage, most mortgage companies only require a tax return transcript for income verification purposes. Most of these companies participate in our IVES (Income Verification Express Service) program and can request (with your consent) to have a transcript sent directly to the financial institution. If you need to order a transcript, please follow the process described above and have it mailed to the address we have on file for you. Please plan accordingly and allow for time for delivery.

Disaster Victims. If you live in a federally declared disaster area, you can get a free copy of your tax return. Visit IRS.gov for more <u>disaster relief information</u>.

Financial Aid Applicants. If you are applying for financial aid, you can use the <u>IRS Data</u> <u>Retrieval Tool</u> on the FAFSA website to import your tax return information to your financial aid application. The temporary shutdown of the Get Transcript tool does not affect the Data Retrieval Tool. You may also click on the FAFSA <u>help page</u> for more information.

If you need a copy of your transcript you should follow the information above to request it as soon as possible. It takes five to ten days for transcripts to arrive at the address the IRS has on file for you.

Identity Theft Victims. Did you receive a notice from the IRS about a suspicious return? Has the IRS notified you that it did not accept your e-filed return because of a duplicate Social Security Number? If you answered yes to either question, then you may be a victim of tax-related identity theft. If you are a tax-related identity theft victim you first need to file the <u>Identity Theft Affidavit</u>. If you are waiting for the IRS to resolve your case but need a transcript, you will need to call our Identity Protection Specialized Unit line to process your request. You can call the Unit at 800-908-4490. For more information please review our <u>Taxpayer Guide to Identity Theft</u>.

Remember, ordering a transcript online is the quickest option. Just go to IRS.gov and use the <u>Get</u> <u>Transcript tool</u>.