



Ordering an IRS Tax Return Transcript for Verification

Tax filers can request a transcript, free of charge, of their prior year tax return from the IRS by one of three ways. For verification, only Tax Return Transcripts are acceptable, NOT Tax Account Transcripts.

Make a copy for your records as the IRS only allows one transcript per tax filer.

NOTE: Ordering a transcript means the IRS has to validate the information provided on the form such as SSN and address. If any information does not match the IRS records (i.e., what you put on your original tax return), the IRS will notify the tax filer that it was not able to provide the transcript.

Please contact SMU Financial Aid if this happens to you:

(FA.Verification@mail.smu.edu; 214-768-3417).

Online Request

- Available on the IRS Web site at www.irs.gov
- In the **Online Services** section of the homepage, on the right hand side, click “Order a Tax Return or Account Transcript”
- Then click “Order a Transcript”
- Enter the tax filer’s Social Security Number, date of birth, street address, and zip or postal 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 the appropriate calendar year for verification (for example “2011” or “2012”).
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request, within 5 to 10 days from the time the on-line request was successfully transmitted to the IRS.
- **To send the transcript directly to SMU - provide SMU’s fax number 214-768-3878 as the destination on the form, and NOT SMU’s name and physical address (3rd parties are not allowed as recipients otherwise).**

Telephone Request – 2 options:

Main IRS Help line (Mon.-Fri., 7am-7pm; non-automated) → 1-800-829-1040

- Use this line if you have trouble with the automated system
- Also, if you incorrectly entered your address on your original tax return, speaking with an IRS representative may improve your chances of obtaining a transcript

Automated Transcript Request line → 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 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.



- Select “**Option 2**” to request an IRS Tax Return Transcript and then enter the appropriate calendar year (for example “2011” or “2012”).
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request, within 5 to 10 days from the time the IRS receives the request.
- **To send the transcript directly to SMU - provide SMU’s fax number 214-768-3878 as the destination, and NOT SMU’s name and physical address (3rd parties are not allowed as recipients otherwise).**

Paper Request Form – IRS Form 4506T-EZ

- **IRS Form 4506T-EZ is advantageous over Form 4506-T because it takes less time to complete and allows 3rd party recipients.**
- Download at <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf>
- Complete lines 1 – 4, following the instructions on page 2 of the form. Note that line 3 should be the most current address as filed with the IRS. It is the address where the IRS Tax Return Transcript will be sent, unless you specify otherwise on Line 5. If the address has recently changed, include the address listed on the latest tax return filed on Line 4. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- **Line 5 provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS. You can provide SMU’s address as the 3rd party:**

**ATTN: Financial Aid – Verification Dept.
Southern Methodist University
Division of Enrollment Services
P. O. Box 750181
Dallas, TX 75275-0181**

- On line 6, enter the appropriate calendar year for which you need to receive IRS tax information for verification (for example, calendar year 2012 for 2013-2014 FAFSA verification).
- The tax filers (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.
- Tax filers can expect to receive their transcript within 5 to 10 days from the time the IRS receives and processes their signed request.

If you filed an amended Tax Return Form 1040X

You must submit 2 items:

- 1) A **signed** copy of the original **Form 1040** or **Tax Return Transcript** for the appropriate aid year
- 2) A **signed** copy of the **Form 1040X** for the appropriate aid year that was filed with the IRS