

How to...

REQUEST YOUR FEDERAL TAX TRANSCRIPTS

HAVE YOU BEEN SELECTED FOR VERIFICATION?

If you have been selected for verification, you will need to submit additional documents such as your (and/or your spouse's or parents') tax return transcript(s). You can acquire transcripts online, request them to be sent to you by mail, or contact your local IRS office by using the office Locator at <http://apps.irs.gov/app/officeLocator/index.jsp>.

TO ORDER BY MAIL:

1. Go to www.irs.gov. Select "Get Your Tax Record".

A screenshot of the IRS website's 'Get Your Tax Record' menu. The menu is a grid of buttons. The button 'Get Your Tax Record' is circled in green. Other buttons include 'Get Your Refund Status', 'View Your Account', 'Where's Your Amended Return?', 'Get Answers to Your Tax Questions', 'Make a Payment', 'Renew Your PTIN', and 'Apply for an Employer ID Number (EIN)'.

2. Scroll until you see the "Get a Transcript by MAIL" option. Select and move through the prompts.

A screenshot of the 'Request by Mail' page on the IRS website. The page has a heading 'Request by Mail' and a sub-heading 'What You Need'. Below this, it lists the requirements: SSN or Individual Tax Identification Number (ITIN), date of birth, and mailing address. Under 'What You Get', it states that transcripts are delivered by mail and arrive in 5 to 10 calendar days. A blue button labeled 'Get Transcript by Mail' is circled in green. At the bottom, there is a disclaimer: 'THIS U.S. GOVERNMENT SYSTEM IS FOR AUTHORIZED USE ONLY!' and an 'OK' button.

3. Enter your Social Security Number, Date of Birth, Street Address, and Zip Code. Click "Continue".
NOTE: Make sure that you enter your address EXACTLY as it reads on your tax return.

A screenshot of the 'Get Transcript by Mail' form. It includes fields for Social Security Number (SSN) or Individual Tax ID Number (ITIN), Date of Birth (MM/DD/YYYY), Street Address, and ZIP or Postal Code. A blue 'CONTINUE' button is at the bottom.

4. Select the transcript type (Return) and Tax Year you are requesting; then press "Continue"

A screenshot of the 'Get Transcript by Mail' form showing the selection of transcript type and tax year. The 'Return Transcript' option is selected under 'Select Transcript Type'. The '2018' option is selected under 'Select Tax Year'. A blue 'CONTINUE' button is at the bottom.

5. You will then receive confirmation.

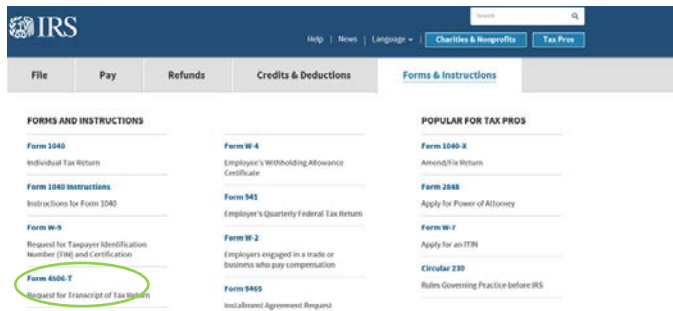
A screenshot of the confirmation page for the transcript request. It states: 'We have accepted your request for a 2018 Return Transcript. Please allow 5-10 days to receive it. The transcript will be sent to the address we have on file for you.' Below this, there are two buttons: 'EXIT' and 'REQUEST A DIFFERENT TRANSCRIPT'.



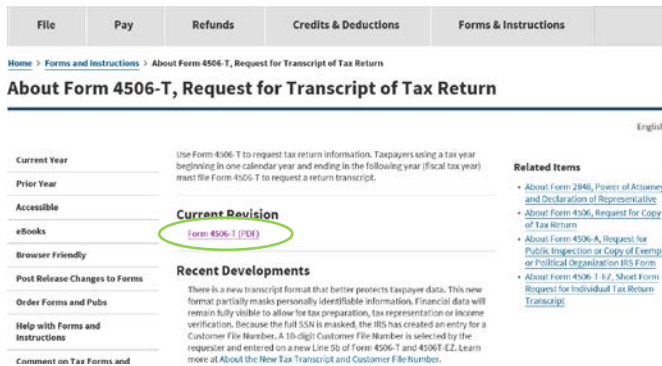
Verification of Non-filing, W-2s, and other requirements

If you've tried to request your information by utilizing the online resource and were unable, then you will either need to fill out a 4506-T form or call the IRS at 1.800.908.9946.

1. **4506-T:** Visit www.irs.gov. Hover over "Forms & Instructions" and select "Form 4506-T" link.



2. Select "Form 4506-T (PDF)" link.



3. Fill the form in with the applicable information (see example). Make sure to provide:
 - a. Name & Social Security Number
 - b. Current Address (previous only if changed since completing your taxes)
 - c. Transcript requested (i.e. 1040, 1040EZ, 1040A)
 - d. Mark check boxes for 6a, 7, and 8
 - e. Year or period will always be 12/31/year
 - f. Check the Signatory box and sign it.

Form 4506-T (June 2019) **Request for Transcript of Tax Return** OMB No. 1545-1872

Do not sign this form unless all applicable lines have been completed. Request may be rejected if the form is incomplete or illegible. For more information about Form 4506-T, visit www.irs.gov/form4506t.

Tip: Use Form 4506-T to order a transcript or other return information free of charge. See the product list below. You can quickly request transcripts by using our automated self-help service tools. Please visit at irs.gov and click on "Get a Tax Transcript..." under "Tools" or call 1-800-908-9946. If you need a copy of your return, use Form 4506, Request for Copy of Tax Return. There is a fee to get a copy of your return.

1a Name shown on tax return. If a joint return, enter the name shown first. **1b First social security number on tax return, individual taxpayer identification number, or employer identification number (see instructions)**

Shirley A Pain **123-45-6789**

2a If a joint return, enter spouse's name shown on tax return. **2b Second social security number or individual taxpayer identification number (if joint tax return)**

Nick O Lodian **987-65-4321**

3 Current name, address (including apt., room, or suite no.), city, state, and ZIP code (see instructions)
Shirley A Pain, 1234 Happy Ln, Apt. 4, Reno, NV, 98510

4 Previous address shown on the last return filed if different from line 3 (see instructions)
8765 Burgerking Avenue, Chicago, IL, 60290

5 Customer file number (if applicable) (see instructions)

Note: Effective July 2019, the IRS will mail tax transcript requests only to your address of record. See **What's New** under **Future Developments** on Page 2 for additional information.

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. **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

b **Account Transcript**, which contains information on the financial status of the account, such as payments made on the account, penalty assessments, and adjustments made by you or the IRS after the return was filed. Return information is limited to items such as tax liability and estimated tax payments. Account transcripts are available for most returns. Most requests will be processed within 10 business days

c **Record of Account**, which provides the most detailed information as it is a combination of the Return Transcript and the Account Transcript. Available for current year and 3 prior tax years. Most requests will be processed within 10 business days

7 **Verification of Nonfiling**, which is proof from the IRS that you did not file a return for the year. Current year requests are only available after June 15th. There are no availability restrictions on prior year requests. Most requests will be processed within 10 business days

8 **Form W-2, Form 1099 series, Form 1098 series, or Form 5498 series transcript.** The IRS can provide a transcript that includes data from these information returns. State or local information is not included with the Form W-2 information. The IRS may be able to provide this transcript information for up to 10 years. Information for the current year is generally not available until the year after it is filed with the IRS. For example, W-2 information for 2016, filed in 2017, will likely not be available from the IRS until 2018. If you need W-2 information for retirement purposes, you should contact the Social Security Administration at 1-800-772-1213. Most requests will be processed within 10 business days

Caution: If you need a copy of Form W-2 or Form 1099, you should first contact the payer. To get a copy of the Form W-2 or Form 1099 filed 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. **12 / 31 / 2018**

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

Signature of taxpayer(s). I declare that I am either the taxpayer whose name is shown on line 1a or 2a, or a person authorized to obtain the tax information requested. If the request applies to a joint return, at least one spouse must sign. If signed by a corporate officer, 1 percent or more shareholder, partner, managing member, guardian, tax matters partner, executor, receiver, administrator, trustee, or party other than the taxpayer, I certify that I have the authority to execute Form 4506-T on behalf of the taxpayer. **Note:** This form must be received by IRS within 120 days of the signature date.

Signatory attests that he/she has read the attestation clause and upon so reading declares that he/she has the authority to sign the Form 4506-T. See instructions. Phone number of taxpayer on line 1a or 2a: **509-777-3321**

Sign Here Signature (see instructions) Date
Title (if line 1a above is a corporation, partnership, estate, or trust)
Spouse's signature Date

4. Mail or fax the form to the appropriate IRS address (shown within instructions on 2nd page).