

## HOW TO REQUEST A TAX RETURN TRANSCRIPT FROM THE IRS

A **2016 IRS Tax Return Transcript** may be obtained through:

- Get Transcript by MAIL – Go to [www.irs.gov](http://www.irs.gov), on the home page, click "Get Your Tax Record." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- Get Transcript ONLINE – Go to [www.irs.gov](http://www.irs.gov), on the home page, click "Get Your Tax Record." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
  - When entering the information into the IRS address matching system, note the following:
    - The address entered must match the address already on file with the IRS exactly.
    - The address on file is typically the address on your most recent tax return.
    - Spelling out the word "street" rather than using the abbreviation "st." can sometimes be enough to cause an error.
    - Addresses on the IRS system are auto-corrected through a United States Postal Services software and may not match what you put on your tax return.
  - We have the Following Suggestions if you run into problems:
    - Have your most recent tax return in front of you to enter the address carefully as it is on your return.
    - If you have entered your address as it appears on your return and it does not work, try using the standardized version of your address
      - To get a standardized version of your address go to the [USPS website](http://usps.com) and search by Zip code. Enter the address and click find.
    - If you still have problems, the IRS.gov website help desk can be reached at 1-800-829-1040 (Monday through Friday) 7am-7pm (Eastern Standard Time)
  - **If at any point, you cannot validate your identity – for example you cannot provide financial verification information or you lack access to a mobile phone - you will need to use the Get Transcript by MAIL option above.**
- Automated Telephone Request – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

For those who were married but filed separate 2016 IRS income tax returns, the IRS DRT cannot be used and the **2016 IRS Tax Return Transcript(s)** must be provided for each person.

## HOW TO REQUEST A VERIFICATION OF NON-FILING LETTER FROM THE IRS

A **2016 Verification of Non-Filing Letter** may be obtained through:

### Get Transcript ONLINE

- Go to [www.irs.gov](http://www.irs.gov), on the home page, click "Get Your Tax Record."
- Click "Get Transcript ONLINE." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). If at any point, you cannot validate your identity – for example you cannot provide financial verification information or you lack access to a mobile phone - you will need to use the Get Transcript by MAIL option (see below for instructions).
- Enter the non-filer's Social Security Number (you can use your ITIN or EIN), e-mail address, filing status, account numbers for loan or credit card associated with your name, and mobile phone associate with your name. This information will be used to verify your identity with the IRS.
- Click "Continue".
- Select "**Verification of Non-filing Letter**" and in the tax year field select "**2016**"
- If successfully validated, you will be able to view your IRS Verification of Non-filing Letter that can then print it out for submission.
- Write the Student ID number (K00 number) on the letter and submit the letter to the financial aid office.

### Get Transcript by MAIL – Paper Request Form 4506-T

- [Download IRS Form 4506-T](#)
- Complete Lines 1 – 4, following the instructions on page 2 of the form.
- Line 5: provides non-filers with the option to have their IRS Verification of Non-filing Letter mailed directly to a 3rd party by the IRS. **WE SUGGEST LEAVING THIS LINE BLANK AND ONLY MAILING A COPY TO YOURSELF.** Students who choose to have the form mailed to our office by the IRS will be held responsible if not received.
- Line 7: Select the checkbox on the right hand side for Verification of Non-filing.
- Line 9: In the year or period requested field, enter "12/31/2016".
- Above the signature line: Make sure that you check the signatory authority box.
- **The non-filer must sign and date the form and enter their telephone number.**
- Mail or Fax the Completed IRS Form 4506-T to the address or FAX number provided on page 2 of form 4506-T.
- If the 4506-T information is successfully validated, tax filers can expect to receive a paper IRS Verification of Non-filing letter at the address provided on their request within 5 to 10 days.
- Submit the letter to the financial aid office; be sure you put your student ID number (K00 number) on the letter.

*\*IRS documents that clearly indicate that the IRS does not have a tax return record on file for the tax year are acceptable for verification of non-filing. This includes a Tax Return Transcript or a Tax Account Transcript that includes a message such as "no record of return filed" or "no transcript on file".*

*Important: Some IRS documents, including tax transcripts, may include a message that indicates that the request "could not be processed", or the "request could not be honored". Any IRS document with such unclear messages is not acceptable documentation for verification of non-filing.*

**IRS Form 13873:** *In some instances, instead of providing the requested document, the IRS may provide the tax filer an IRS Form 13873. There are several versions of IRS Form 13873 (e.g. 13873-T, 13873-V, etc.). Any version of IRS Form 13873 that clearly states that the form is provided to the individual as verification of non-filing or that states that the IRS has no record of a tax return is acceptable documentation of non-filing.*