

2023-24 Tax Transcript Request & Verification of Non-Filing Process

Independent students will only need to request tax information for student/spouse (if applicable)

Dependent students will need to request tax information for both the student (if tax return was filed) AND parent. Parent would need to be available to answer required questions to get information.

Students and/or parents who did not file taxes, must submit a verification of non-filing.

To request tax information choose one of the following 3 methods:

1) **On-line Request – to be printed online or mailed to student**

Tax information can be requested and mailed to the student from www.irs.gov/transcript

- Get Transcript Online or Get Transcript by Mail
- Enter the tax filer’s Social Security number, date of birth, street address, and ZIP Code or postal code. Use the address currently on file with the IRS. Generally, the street address and ZIP Code will be what was included on the latest tax return filed with the IRS by the tax filer. However, if an address change has been completed either directly with the IRS or with the U.S. Postal Service, the IRS may have the updated address on file, which must be used. For a joint tax return, use the primary tax filer’s information.
- Click “Continue.”
- In the Type of Transcript field, select “**Return Transcript**” or “**Verification of Non-Filing**” and, in the Tax Year field, select “2021.”
- Click “Continue.”
- Online- If successful immediate download. Mail- 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 business days from the time the online request was successfully transmitted to the IRS.
- IRS Tax Return Transcripts requested online cannot be mailed to an address other than the address on file with the IRS.

2) **Telephone Request –to be mailed to student**

Available from the IRS by calling **1-800-908-9946**

- Enter the primary filer’s 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** or select appropriate option to request an IRS **Verification of Non-Filing**, then enter “2021”. If successfully validated, tax filers can expect to receive a paper IRS Transcript at the address that was used in their telephone request, within 5 to 10 days from the time the IRS receives the request. IRS Transcripts requested by telephone cannot be sent directly to a third party by the IRS.

3) **On-line request for IRS form 4506-T Paper Request Form**

- Download at <http://www.irs.gov/pub/irs-pdf/f4506t.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. 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.

Institutions are responsible for notifying aid applicants whether to list the institution as the third party to receive the Transcript or not. Some institutions may have difficulty matching a parent's incoming IRS Tax Return Transcript to the aid applicant, as the two names may be different.

- For **Return Transcript**: On-line 6, enter form number and check box "a".

For **Verification of Non-Filing**: check line "7".

- Line 9 enter tax year ending 12/31/2021
- 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 4506-T to the appropriate address provided on page 2 of Form 4506-T. Tax filers can expect to receive their transcript within 5 to 10 days from the time the IRS receives and processes their signed request. NOTE: Processing form 4506-T means verifying/validating the information provided on the form. If any information does not match the IRS records, the IRS will notify the tax filer that it was not able to provide the transcript

- IRS Form 4506-T should be used if you have a different address than what is on your 2021 Federal Tax return.