# Walden University

# IRS Tax Return Transcript and Verification of Non-Filing Request Process

Tax filers (including victims of IRS tax-related identity theft) can request from the Internal Revenue Service (IRS) an IRS Tax Return Transcript of their 2019 tax return information, free of charge, in several ways.

Under all methods, when requesting a transcript, tax filers need to provide their Social Security Number (SSN), date of birth, their street address, and ZIP Code as is currently on file with the IRS.  Generally, this is the address included on the latest tax return filed with the IRS.  However, if an address change was made either with the IRS or with the U.S. Postal Service, the IRS may have the updated address on file. If this is the case, use the updated address.

Joint Tax Return - When requesting a transcript using the electronic processes described below, use the primary tax filer's information (e.g., SSN).  When requesting a transcript using the paper process described below, either spouse may submit the request and only one signature is required.

Tax Transcript Availability – Availability varies based on the method a tax filer used to file their return and whether they have a refund or balance due.  Visit https://www.irs.gov/individuals/transcript-availability for more information.

**Nontax filers** must provide confirmation of their non-filing status from the IRS or other relevant tax authority. A nontax filer is an individual who did not file taxes, is not required to file taxes, or was granted a filing extension. A dependent student who is a nontax filer is not required to provide an IRS Verification of Non-filing Letter or other confirmation of non-filing status; only their parent(s) (if applicable).

*Please note:  If you are having trouble obtaining your tax transcript or a Verification of Non-filing Letter, please contact the Office of Financial Aid for assistance.*

## TAX FILERS

### Online Request - Get Transcript ONLINE

- Go to www.irs.gov.
- Click "Get Your Tax Record".
- Click "Get Transcript Online".
- If you have previously registered, you may log in with your username and password.
  To use the Get Transcript Online tool, you must have\*:
    - access to a valid email account,
    - a text-enabled mobile phone (pay-as-you-go plans cannot be used) in your name; and
    - specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan).
  The transcript options display online upon successful completion of the IRS's two-step authentication.
- Choose "Higher Education/Student Aid" as the reason.
- Leave "Customer File Number" blank.
- Click "Go".
- In the "Return Transcript" section, select the tax year 2019 (if there is an asterisk next to 2019 and you have filed your tax return, it means the IRS has not yet processed your tax return - you will need to log back into the website later).
- A PDF of your IRS tax return transcript will appear immediately on your screen.
- Save and/or print your IRS tax return transcript for your records.
- Forward a copy of your IRS tax return transcript to the Office of Financial Aid.

 *\* If you are not able to successfully register for the Get Transcript Online, you will be able to request a tax return transcript using one of the other methods mentioned below*

## Online Request - Get Transcript by MAIL

- Go to www.irs.gov.
- Click "Get Your Tax Record".
- Click "Get Transcript by MAIL".
- Click "OK"
- Enter
    - Social Security Number (SSN) or Individual Tax ID Number (ITIN)
    - Date of Birth
    - Street Address
    - Zip/Postal Code
- Click "Continue".
- Select "Return Transcript".
- Select "2019".
- Leave "Customer File Number" blank.
- Click "Continue".
- If the IRS has processed your 2019 tax return, a message will appear indicating that your request has been accepted, and to allow 5-10 days to receive it.
- Upon receipt, forward a copy of your IRS tax return transcript to the Office of Financial Aid.

## Paper Request Form – IRS Form 4506T-EZ, Short Form Request for Individual Tax Return Transcript

- Download IRS Form 4506T-EZ.
- Complete lines 1 – 4, following the instructions on page 2 of the form.
- Line 6: Enter "2019" to receive tax information for the 2019 tax year that is required for 2021-2022 FAFSA® verification.
- You must **check the box above the signature line**, sign and date the form and enter your telephone number.  Sign the IRS Form 4506T-EZ exactly as your name appeared on the original tax return.  If you changed your name prior to submitting your tax return, also sign your current name.
- Mail or fax the completed IRS Form 4506T-EZ to the appropriate address (or fax number) provided on page 2 of IRS Form 4506T-EZ.
- You can expect to receive your IRS Tax Return Transcript generally within 5-10 business days from the time the IRS receives and processes the completed and signed IRS Form 4506T-EZ request.

    *NOTE:  If any information does not match IRS records, the IRS will notify you that it was not able to provide the transcript.*

## Paper Request Form – IRS Form 4506-T, Request for Transcript of Tax Return

- Download IRS Form 4506-T.
- Complete lines 1 – 4, following the instructions on page 2 of the form.
- Line 6: Enter "1040" and then check box "(a) Return Transcript".
- Line 9: Enter "12/31/2019" to receive IRS tax information for the 2019 tax year that is required for 2021-2022 FAFSA® verification.
- You must **check the box above the signature line**, sign and date the form and enter your telephone number.  Sign the IRS Form 4506-T exactly as your name appeared on the original tax return.  If you changed your name after submitting your tax return, also sign your current name.
- Mail or fax the completed IRS Form 4506-T to the appropriate address (or fax number) provided on page 2 of IRS Form 4506-T.
- You can expect to receive your IRS Tax Return Transcript generally within 5-10 business days from the time the IRS receives and processes the completed and signed IRS Form 4506-T request.

    *NOTE:  If any information does not match IRS records, the IRS will notify you that it was not able to provide the transcript.*

## Telephone Request

- Available from the IRS by calling 1-800-908-9946. Phone requests are via an automated process.
- You must follow prompts to enter your Social Security number and the numbers in your street address.
- Select "**Option 2"** to request an IRS Tax Return Transcript and then enter "**2019.**"
- If successfully validated, you can expect to receive a paper IRS Tax Return Transcript at the address included in your telephone request generally within 5-10 business days from the time the IRS receives the request.
- IRS Tax Return Transcripts requested by telephone cannot be mailed to an address other than the address on file with the IRS.


# Victims of IRS Tax-Related Identity Theft

A victim of IRS identity theft who is not able to obtain a 2019 IRS Tax Transcript must still complete the verification process.

You may obtain a Tax Return DataBase View (TRDBV) transcript and inform the IRS of the tax-related identity theft by calling the IRS's Identity Protection Specialized Unit (IPSU) at 1-800-908-4490.  After the IPSU authenticates your identity, you can ask the IRS to mail you a 2019 TRDBV tax transcript.  You should receive this transcript generally within 5-10 business days.


# Non-IRS Income Tax Returns

If you filed an income tax return with Guam, the Commonwealth of the Northern Mariana Islands, the Commonwealth of Puerto Rico or the U.S. Virgin Islands, you may provide a signed copy of your income tax return that was filed with the relevant tax authority. However, if Walden University questions the accuracy of the information on the signed copy of the income tax return, you must provide a copy of the tax account information issued by the relevant tax authority.

If you filed an income tax return with the tax authority for American Samoa, you must provide a signed copy of your tax account information.

If you filed an income tax return with tax authorities not mentioned above, i.e. a foreign tax authority, and who indicates that you are unable to obtain the tax account information free of charge, you must provide documentation that the tax authority charges a fee to obtain that information, along with a signed copy of your income tax return that was filed with the relevant tax authority.

# NONTAX FILERS

## Verification of Non-filing Letter

If you did not file an IRS tax return for 2019 but have filed taxes in the past, you can use the Get Transcript Online option listed above (if successfully registered) to obtain a PDF page indicating that the IRS has no record of a tax return being filed.  The * symbol next to the return transcript year 2019 will indicate the availability of a Verification of Non-filing Letter. You can choose "Verification of Non-filing" and enter 2019 in the tax year field. This letter must be dated on or after October 1, 2020.

If you are not able to successfully register to use the Get Transcript Online tool or have never filed an IRS tax return, you will need to request a Verification of Non-filing (VONF) Letter using the paper request form method below.

If you would typically file a non-IRS tax return, you will need to obtain the Verification of Non-filing Letter from the tax authority.

## Paper Request Form – IRS Form 4506-T

- Download IRS Form 4506-T
- Complete lines 1 – 4, following the instructions on page 2 of the form.
- Line 7: Select the checkbox on the right-hand side for Verification of Non-filing.
- Line 9: Enter "12/31/2019" for tax period.
- You must **check the box above the signature line**, sign and date the form, and enter your telephone number. Only one signature is required when requesting a joint IRS Verification of Non-filing Letter.
- 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 information on IRS Form 4506-T is successfully processed, you can expect to receive a paper IRS Verification of Non-filing Letter at the address provided on the request form generally within 5-10 days.
- Upon receipt, forward a copy of your Verification of Non-filing Letter to the Office of Financial Aid.