

# University of St. Augustine for Health Sciences

## 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 2021 IRS 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.

*In most cases, for electronic tax return filers, 2021 IRS income tax information is available for the IRS DRT (IRS Data Retrieval Tool) or the IRS Tax Return Transcript within 2-3 weeks after the 2021 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2021 paper IRS income tax returns, the 2021 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 6-8 weeks after the 2021 paper IRS income tax return has been received by the IRS. Requests for documents mailed or faxed to the IRS normally take 5-10 business days to process upon receipt.*

**Effective with the 2018-2019 FAFSA, 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) must (if applicable).**

### **TAX FILERS**

#### **Online Request - Get Transcript ONLINE**

- Go to the IRS website ([www.irs.gov](http://www.irs.gov)).
- Choose "Get Your Tax Record".
- Select the option "Get Transcript ONLINE". Be sure to disable pop-up blockers.
- If you have previously registered, you may log in with your username and password.
- To register and use the service for the first time you will be asked a series of credit-based security questions\* and will also need the following information:
  - Social security number,
  - Date of birth,
  - Filing status and mailing address from latest tax return,
  - Access to your email account,
  - Your personal account number from a credit card, mortgage, home equity loan, home equity line of credit or car loan, and
  - A mobile phone with your name on the account.
- Choose "Higher Education/Student Aid" as the reason for your request.
- Click "Go".
- In the "Return Transcript" section, select the tax year 2021 (if there is an asterisk next to 2021 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 at a later date).
- A PDF of your IRS Tax Return Transcript will appear immediately on your screen.
- Save and/or print your Return Transcript for your records.
- Forward a copy of your IRS tax 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 the IRS website ([www.irs.gov](http://www.irs.gov)).
- Choose “Get Your Tax Record”.
- Select the option “Get Transcript by MAIL”. Be sure to disable pop-up blockers.
- Sign in or create an account (you will be asked for your Social Security number, date of birth, and mailing address from your latest tax return).
- Click “Continue”.
- In the “Type of Transcript” field, choose “Return Transcript” and select the tax year 2021.
- Click “Continue”.
- If the IRS has processed your 2021 Tax Return, a message will appear indicating that your request has been accepted.
- The tax return transcript will be mailed to the address on your tax return within 5-10 business days.
- Upon receipt, forward a copy of your IRS tax transcript to the Office of Financial Aid.

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

- Download a PDF for the 4506T-EZ at <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf>
- Complete lines 1 – 4, following the instructions on page 2 of the form.
- 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 IRS Tax Return Transcript from the IRS. Third parties should provide specific address information including a room #, ATTN lines, names, etc. so that the transcript is delivered to the appropriate person/office. The IRS will send the transcript only to the address listed on Line 5. The IRS will not mail a copy of the transcript to the tax filer, nor will the tax filer receive notification that the transcript was sent to the designated third party. If you choose to have your transcript sent directly to the University of St. Augustine for Health Sciences, please enter the following information:

San Marcos, California Campus Office of Financial Aid 1 University Boulevard St. Augustine, FL 32086	Austin, Texas Campus Office of Financial Aid 1 University Boulevard St. Augustine, FL 32086	Dallas, Texas Campus Office of Financial Aid 1 University Boulevard St. Augustine, FL 32086	St. Augustine, Florida Campus Office of Financial Aid 1 University Boulevard St. Augustine, FL 32086	Miami, Florida Campus Office of Financial Aid 1 University Boulevard St. Augustine, FL 32086
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**PLEASE NOTE:** The University of St. Augustine for Health Sciences may have difficulty matching a married applicant that files separately from their spouse since the spouse's transcript will not show the aid applicant's information. Please keep this in mind when determining whether to have your transcript sent to the University of St. Augustine for Health Sciences directly.

- On line 6, enter “2021” to receive tax information for the 2021 tax year that is required for 2023-2024 FAFSA® verification.
- The tax filer must check the box, sign and date the form and enter their 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.
- Tax filers can expect to receive their IRS Tax Return Transcript within 10 business days from the time the IRS receives and processes their signed request. However, if a third party is identified on line 5, the third party can expect to receive the tax filer's IRS Tax Return Transcript within 10 business days from the time the IRS receives and processes the signed request.

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

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

- Download a PDF for the 4506-T at <http://www.irs.gov/pub/irs-pdf/f4506t.pdf>.
- Complete lines 1 – 4, following the instructions on page 2 of the form.
- 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 IRS Tax Return Transcript from the IRS. Third parties should provide specific address information including a room #, ATTN lines, names, etc. so that the transcript is delivered to the appropriate person/office. The IRS will send the transcript only to the address listed on Line 5. The IRS will not mail a copy of the transcript to the tax filer, nor will the tax filer receive notification that the transcript was sent to the designated third party. If you choose to have your transcript sent directly to the University of St. Augustine for Health Sciences, please enter the following information:

San Marcos, California Campus Office of Financial Aid 1 University Boulevard St. Augustine, FL 32086	Austin, Texas Campus Office of Financial Aid 1 University Boulevard St. Augustine, FL 32086	Dallas, Texas Campus Office of Financial Aid 1 University Boulevard St. Augustine, FL 32086	St. Augustine, Florida Campus Office of Financial Aid 1 University Boulevard St. Augustine, FL 32086	Miami, Florida Campus Office of Financial Aid 1 University Boulevard St. Augustine, FL 32086
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**PLEASE NOTE:** The University of St. Augustine for Health Sciences may have difficulty matching a married applicant that files separately from their spouse since the spouse's transcript will not show the aid applicant's information. Please keep this in mind when determining whether to have your transcript sent to the University of St. Augustine for Health Sciences directly.

- On line 6, enter the tax form number that is being requested (1040, 1040A, 1040EZ, etc.) and then check box (a) Return Transcript. Only one tax form number can be used per request.
- On line 9, enter "12/31/2021" to receive IRS tax information for the 2021 tax year that is required for 2023-2024 FAFSA® verification.
- The tax filer must check the box, sign and date the form and enter their 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.
- Tax filers can expect to receive their IRS Tax Return Transcript or IRS Record of Account within 10 business days from the time the IRS receives and processes the completed and signed 4506-T request. However, if a third party is identified on line 5, the third party can expect to receive the tax filer's IRS Tax Return Transcript within 10 business days from the time the IRS receives and processes the signed request.

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

### **Telephone Request**

- Available from the IRS by calling 1-800-908-9946.
- Tax filers must follow prompts to enter their Social Security number and the numbers in their street address.
- Select "**Option 2**" to request an IRS Tax Return Transcript and then enter "**2021**."
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their telephone request 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 2021 IRS Tax Transcript must still complete the verification process.

Tax filers may obtain a Transcript DataBase View (TRDBV) 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. The IPSU will first authenticate the identity of the tax filer, who can then ask the IRS to mail them a 2021 TRDBV tax transcript. You should receive this transcript within 10 business days.

# **NONTAX FILERS**

## **Verification of Non-Filing Letter**

Individuals who did not file an IRS tax return for 2021 but have filed taxes in the past 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 2021 will indicate the availability of a Verification of Non-Filing Letter. You can also choose "Verification of Non-Filing Letter and enter 2021 in the tax year field. This letter must be dated on or after October 1, 2022.

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

## **Paper Request Form – IRS Form 4506-T**

- Download IRS Form 4506-T at <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>
- Complete lines 1 – 4, following the instructions on page 2 of the form.
- Line 3: enter the non-filer's street address and zip or postal code.
- Line 5 provides non-filers with the option to have their IRS Verification of Non-Filing Letter mailed directly to a third party by the IRS.
- Line 7: Select the checkbox on the right-hand side for Verification of Non-Filing.
- Line 9: enter "12/31/2021" for tax period.
- The non-filer must check the box, sign and date the form, and enter their 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 4506-T information is successfully processed, you can expect to receive a paper IRS Verification of Non-Filing Letter at the address provided on the request form within 5-10 days.
- Upon receipt, forward a copy of your Verification of Non-Filing Letter to the Office of Financial Aid.

**NOTE: If you typically would have filed a Puerto Rican or Foreign Income Tax Return, you must submit appropriate non-filing documentation from a relevant tax authority.**