

How to Obtain a Tax Transcript from the IRS

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

- **Get Transcript by MAIL** – Go to www.irs.gov, 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, 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.
- **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.

Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2016 must provide:

- A **2016 IRS Tax Return Transcript** (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; **and**
- A signed copy of the 2016 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

Individuals Who Filed Non-IRS Income Tax Returns

- A tax filer who filed an income tax return with Guam, the Commonwealth of the Northern Mariana Islands, the Commonwealth of Puerto Rico and the U.S. Virgin Islands may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.
- A tax filer who filed an income tax return with the tax authority for American Samoa must provide a copy of his or her tax account information.
- A tax filer who filed an income tax return with tax authorities not mentioned above, i.e. a foreign tax authority, should submit a transcript obtained from the foreign tax authority. Information should be translated into English and converted into US dollars. If a free transcript is not available, you must provide documentation that the tax authority charges a fee to obtain that information, along with a signed copy of the income tax return that was filed with the relevant tax authority. Information should be translated into English and converted to US dollars.

Individuals Who Were Victims of IRS Tax-Related Identity Theft

An individual who was the victim of IRS tax-related identity theft must provide:

- A Tax Return DataBase View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; **and**
- A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

How to Obtain a Verification of Non-filing letter from the IRS

An IRS Verification of Non-filing Letter will provide proof from the IRS that there is no record of a filed tax form (1040, 1040A, or 1040EZ) for the year you have requested. For the 2018-2019 academic year, you will be requesting a verification letter for 2016. Non-Tax filers can request an IRS Verification of non-filing, free of charge from the IRS in one of the following ways:

Online Request @ www.irs.gov:

- Click on “Get your Tax Record,” then click “Get Transcript Online.”
- Enter Social Security Number, email address, filing status, and account numbers for loan or credit card associated with your name, and mobile phone associated with your name.
 - *If you are unable to and/or do not have accounts in your name that meet the identity validation requirements, you will either need to request the form by PHONE or by PAPER-you CANNOT request the transcript to be mailed via the IRS website.*
- 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 and print your IRS Verification of Non-filing Letter.

By Phone @ 1-800-908-9946:

- Follow the prompts to enter social security number and the numbers in your street address.
- Select "**Option 2**" to request an **IRS Verification of Non-filing Letter** and then enter "**2016**".
- If successfully validated, you can anticipate receiving a paper IRS Verification of Non-filing Letter to the address used in the phone request within 5 to 10 days.

By Paper using IRS form 4506-T. This is the **ONLY** option for individuals who have never filed a tax return with the IRS. How to complete the IRS Form 4506-T:

- 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 7: Select the checkbox on the right hand side for **Verification of Non-filing**.
- Line 9: Year or period requested field, enter **12/31/2016**.
- The non-filer must 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 form 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 10 to 15 days.

Please note: Instead of a “Verification of Non-filing” letter, we can also accept any IRS document (such as a Form 13873 or Tax Account Transcript) that clearly indicates that the IRS does not have a tax return record on file for 2016.

What happens if my parents, or I/spouse lived, or live, outside the U.S and cannot obtain the IRS Verification of Non-filing Letter?

Individuals from a U.S. territory or commonwealth (Puerto Rico) or a foreign central government who are not required to file an income tax return under that taxing authority’s rules must submit the following:

A signed and dated statement certifying:

- The sources and amounts of *all* of the individual(s) income in 2016, converted to U.S. dollars, and
- That the individual(s) has not filed and is not required to file taxes in 2016 in his/her country, and the name of that country,

AND

Documentation from the taxing authority that the individual(s) did not file a tax return.

- If such documentation does not exist, or if the individual(s) is unable to obtain the documentation, the individual must include in his/her signed statement a certification stating that that the tax authority does not provide such documentation **or** that the individual was unable to obtain the documentation after contacting the tax authority.