

IRS Tax Return Transcript/Non-Filing Letter Request Processes

Marshall University's Office of Student Financial Assistance prefers students and parents use the IRS Data Retrieval Tool when completing or correcting the FAFSA. If this process is successfully used and no data elements are changed, this office should not need to collect an IRS Tax Return Transcript.

In most cases, for electronic tax return filers, IRS income tax return information is available for IRS Data Retrieval in FAFSA on the Web or via IRS Tax Return Transcript within 2 to 3 weeks after the electronic IRS income tax return has been accepted by the IRS. Generally, for filers of paper IRS income tax returns, the IRS income tax return information is available within 6 to 8 weeks after the paper IRS income tax return has been received by the IRS.

Unfortunately, the IRS Data Retrieval Tool cannot be used by all applicants for a variety of reasons. If you are one of those applicants or parent(s) of one of those applicants and this office has requested a copy of your or your parent's IRS Tax Return Transcript, the options shown below should help you or your parent obtain the required documentation. If you and your spouse (if married) or your parents filed separate IRS income tax returns for the tax year required, the IRS Data Retrieval Tool cannot be used and the **IRS Tax Return Transcripts** must be requested for each tax filer.

NOTE: The Office of SFA **cannot** accept an Account Transcript or the 1040 form filed with the IRS for the Verification Process.

How to request an IRS Tax Return Transcript

Tax filers may request an IRS Tax Return Transcript, free of charge, from the IRS using one of the below methods. If you need assistance with any of these processes, contact the IRS at 1-800-829-1040.

Get Transcript Online

Go to www.irs.gov and click Get My Tax Record. Click Get Transcript Online then follow prompts. Make sure to request the **IRS Tax Return Transcript** and *NOT* the IRS Tax Account Transcript.

Get Transcript by Mail

Go to www.irs.gov and click Get My Tax Record. Click Get Transcript by Mail then follow prompts. Make sure to request the **IRS Tax Return Transcript** and *NOT* the IRS Tax Account Transcript.

Automated Telephone Request

Call 1-800-908-9946 and follow prompts.

Paper Request Form

Complete and mail the **IRS Form 4506T-EZ** or **IRS Form 4506-T** to the address as instructed on the form. The 4605-T can be printed at <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>.

How to request a Verification of Non-Filing Letter from the IRS

A Verification of Non-Filing Letter may be required of a student, spouse or parent whose data is included on the student's FAFSA and who did not file a Federal tax return for that tax year.

The tax filer must request Verification of Non-Filing. This can be done at www.irs.gov (Get Transcript Online) or by completing the 4506-T and mailing to the address as instructed on the form. A 4506-T can be printed at <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>.

Notes for completing a 4506-T

- Do not complete line 5. The Office of SFA will not be able to connect a Transcript or Verification of Non-Filing Letter to the student's record without the student's MUID and name on it. This document must be mailed to the tax filer, then the student's name and MUID written on it before being sent to the office.
- To request a **Tax Return Transcript**, line 6a must be checked.
- To request a **Verification of Non-Filing Letter**, line 7 must be checked .
- Line 9 must include the tax period for which this is being request. Example: 12/31/2016 for 2016 tax year.