Cleveland State University
engaged*learning*

HOW TO REQUEST THE
IRS VERIFICATION OF NONFILING LETTER

For the 2022-2023 award year, the U.S. Department of Education is requiring independent students and parents that indicate on the FAFSA they did not file a 2020 Tax Return to provide Verification of Non-filing from the IRS.

Ways to Request IRS Verification of Nonfiling:

- Complete IRS form 4506-T - Mark box 7 to request Verification of Non-filing **or**
- Request by phone at 800-908-9946 **or**
- Request online through the IRS "Get Transcript Online" tool (https://www.irs.gov/individuals/get-transcript)
  - The online system requires you to set up a secure IRS account and may not be available to those without credit history or who have never filed with the IRS

How to request an IRS Verification of Non-Filing Letter:

Paper Request Form – IRS Form 4506-T
IRS Form 4506-T can be downloaded 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. Use the address currently on file with the IRS.
- 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. **Do not have your IRS Verification of Non-Filing Letter sent directly to CSU.**
- Line 7: Select the checkbox on the right hand side for Verification of Non-Filing.
- Line 9: Year or period requested field, enter "12/31/2020".
- 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.
- If the 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 5 to 10 days.
- Sign and submit the IRS Verification of Non-Filing Letter to CSU; make sure to include the student's name and ID on the letter.

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. Generally, this will be numbers of the street address that was listed on the latest tax return filed.
- Select "**Option 2**" to request an **IRS Verification of Non-Filing Letter** and then enter "**2020**".
- If successfully validated, non-filers should expect to receive a paper IRS Verification of Non-Filing Letter at the address provided in their telephone request within 5 to 10 days from the time of the request.
- IRS Verification of Non-Filing Letter requested by telephone cannot be sent directly to a third party by the IRS.
- Sign and submit the IRS Verification of Non-Filing Letter to CSU; make sure to include the student's name and CSU ID number on the letter.

You may mail the 4506-T form to the IRS. Please DO NOT submit the IRS 4506-T to the Financial Aid Office.

Turn Over to View a Sample of the 4506-T

Form **4506-T**
(June 2019)
Department of the Treasury
Internal Revenue Service

Request for Transcript of Tax Return

▶ Do not sign this form unless all applicable lines have been completed.
▶ Request may be rejected if the form is incomplete or illegible.
▶ For more information about Form 4506-T, visit *www.irs.gov/form4506t*.

OMB No. 1545-1872

Tip. Use Form 4506-T to order a transcript or other return information free of charge. See the product list below. You can quickly request transcripts by using our automated self-help service tools. Please visit us at IRS.gov and click on "Get a Tax Transcript..." under "Tools" or call 1-800-908-9946. If you need a copy of your return, use **Form 4506, Request for Copy of Tax Return.** There is a fee to get a copy of your return.

1a Name shown on tax return. If a joint return, enter the name shown first.	**1b** First social security number on tax return, individual taxpayer identification number, or employer identification number (see instructions)
2a If a joint return, enter spouse's name shown on tax return.	**2b** Second social security number or individual taxpayer identification number if joint tax return

3 Current name, address (including apt., room, or suite no.), city, state, and ZIP code (see instructions)

4 Previous address shown on the last return filed if different from line 3 (see instructions)

5 Customer file number (if applicable) (see instructions)

Note: Effective July 2019, the IRS will mail tax transcript requests only to your address of record. See **What's New** under **Future Developments** on Page 2 for additional information.

6 **Transcript requested.** Enter the tax form number here (1040, 1065, 1120, etc.) and check the appropriate box below. Enter only one tax form number per request. ▶ _____

a **Return Transcript,** which includes most of the line items of a tax return as filed with the IRS. A tax return transcript does not reflect changes made to the account after the return is processed. Transcripts are only available for the following returns: Form 1040 series, Form 1065, Form 1120, Form 1120-A, Form 1120-H, Form 1120-L, and Form 1120S. Return transcripts are available for the current year and returns processed during the prior 3 processing years. Most requests will be processed within 10 business days . . . . . . ☐

b **Account Transcript,** which contains information on the financial status of the account, such as payments made on the account, penalty assessments, and adjustments made by you or the IRS after the return was filed. Return information is limited to items such as tax liability and estimated tax payments. Account transcripts are available for most returns. Most requests will be processed within 10 business days . ☐

c **Record of Account,** which provides the most detailed information as it is a combination of the Return Transcript and the Account Transcript. Available for current year and prior 3 tax years. Most requests will be processed within 10 business days . . . . . . ☐

7 **Verification of Nonfiling,** which is proof from the IRS that you did not file a return for the year. Current year requests are only available after June 15th. There are no availability restrictions on prior year requests. Most requests will be processed within 10 business days . . ☐

8 **Form W-2, Form 1099 series, Form 1098 series, or Form 5498 series transcript.** The IRS can provide a transcript that includes data from these information returns. State or local information is not included with the Form W-2 information. The IRS may be able to provide this transcript information for up to 10 years. Information for the current year is generally not available until the year after it is filed with the IRS. For example, W-2 information for 2016, filed in 2017, will likely not be available from the IRS until 2018. If you need W-2 information for retirement purposes, you should contact the Social Security Administration at 1-800-772-1213. Most requests will be processed within 10 business days . ☐
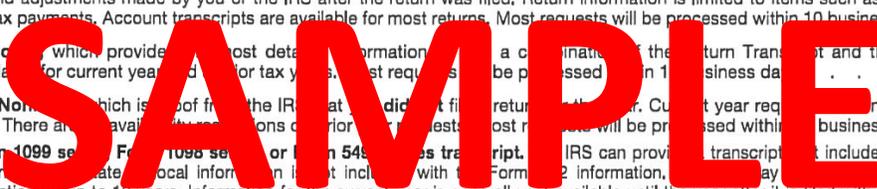
Caution: If you need a copy of Form W-2 or Form 1099, you should first contact the payer. To get a copy of the Form W-2 or Form 1099 filed with your return, you must use Form 4506 and request a copy of your return, which includes all attachments.

9 **Year or period requested.** Enter the ending date of the year or period, using the mm/dd/yyyy format. If you are requesting more than four years or periods, you must attach another Form 4506-T. For requests relating to quarterly tax returns, such as Form 941, you must enter each quarter or tax period separately.

/	/	/	/	/	/	/	/

Caution: Do not sign this form unless all applicable lines have been completed.

Signature of taxpayer(s). I declare that I am either the taxpayer whose name is shown on line 1a or 2a, or a person authorized to obtain the tax information requested. If the request applies to a joint return, at least one spouse must sign. If signed by a corporate officer, 1 percent or more shareholder, partner, managing member, guardian, tax matters partner, executor, receiver, administrator, trustee, or party other than the taxpayer, I certify that I have the authority to execute Form 4506-T on behalf of the taxpayer. **Note:** This form must be received by IRS within 120 days of the signature date.

☐ Signatory attests that he/she has read the attestation clause and upon so reading declares that he/she has the authority to sign the Form 4506-T. See instructions.

Phone number of taxpayer on line 1a or 2a

Sign Here

▶ Signature (see instructions)   Date

▶ Title (if line 1a above is a corporation, partnership, estate, or trust)

▶ Spouse's signature   Date