IRS “Verification of Non-Filing Letter”
Request Form 2018 – 2019 Academic Year

Office of Financial Aid and Scholarships • Indiana University South Bend • P.O. Box 7111 • South Bend, IN 46634-7111
Phone: (574)520-4357    Fax: (574) 520-5561    Email: sbfinaid@iusb.edu    Website: financialaid.iusb.edu

New federal regulations require some students/parents/spouses to submit proof that they did not file an IRS Tax Return for 2016.

If your IU One To-Do-List includes a request for this document, follow these instructions:

1) Request a separate “Verification of Non-Filing Letter” to match each Non-Filing Letter requested on your To-Do-List (for student, parent, and/or spouse).

2) Request your letter(s) by one of the following methods:

A) If the non-filer has their own credit card account, auto loan, mortgage, home equity loan or line of credit, use the much faster “Get Transcript Online” option at www.irs.gov/transcript

B) Any non-filers who do not have their own credit accounts, must complete the attached form and fax or mail it to the IRS.

(If you can’t use Option A, you must use the attached form because the IRS systems will not allow you to request this letter through any of their other request methods including their 800 number or the online “Get Transcript by Mail” option).

After you receive your Non-Filing letter from the IRS:

3) Make sure that the document they sent you includes your SSN or ITIN number.

   Federal aid regulations prohibit us from accepting an IRS RAIVS (13873-V) document because the standard IRS RAIVS document does not include a SSN or ITIN number and federal aid regulations insist that the IRS documentation must include the non-filer’s SSN or ITIN.

4) Write the student name and IU ID # on the IRS letter.

5) Keep a copy of the letter for your records.

6) Submit the Non-Filing letter to the IU Financial Aid Office.

   Fax: 574-520-5561
   Address: Financial Aid Office
   Indiana University South Bend
   1700 Mishawaka Ave.
   South Bend, IN 46634
**Request for Transcript of Tax Return**

- **Request may be rejected if the form is incomplete or illegible.**
- **For more information about Form 4506-T, visit **[www.irs.gov/form4506t](http://www.irs.gov/form4506t)**.

**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 Transcript of Your Tax Records" 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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1a</td>
<td>Name shown on tax return. If a joint return, enter the name shown first.</td>
</tr>
<tr>
<td>1b</td>
<td>First social security number on tax return, individual taxpayer identification number, or employer identification number (see instructions)</td>
</tr>
<tr>
<td>2a</td>
<td>If a joint return, enter spouse's name shown on tax return.</td>
</tr>
<tr>
<td>2b</td>
<td>Second social security number or individual taxpayer identification number if joint tax return</td>
</tr>
<tr>
<td>3</td>
<td>Current name, address (including apt., room, or suite no.), city, state, and ZIP code (see instructions)</td>
</tr>
<tr>
<td>4</td>
<td>Previous address shown on the last return filed if different from line 3 (see instructions)</td>
</tr>
<tr>
<td>5</td>
<td>If the transcript or tax information is to be mailed to a third party (such as a mortgage company), enter the third party's name, address, and telephone number.</td>
</tr>
<tr>
<td>6</td>
<td>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.</td>
</tr>
<tr>
<td>a</td>
<td>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 1120A, Form 1120H, Form 1120L, 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.</td>
</tr>
<tr>
<td>b</td>
<td>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.</td>
</tr>
<tr>
<td>7</td>
<td>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 3 prior tax years. Most requests will be processed within 10 business days. There are no availability restrictions on prior year requests. Most requests will be processed within 10 business days.</td>
</tr>
<tr>
<td>8</td>
<td>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 2011, filed in 2012, will likely not be available from the IRS until 2013. 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.</td>
</tr>
<tr>
<td>9</td>
<td>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.</td>
</tr>
</tbody>
</table>

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.

Phone number of taxpayer on line 1a or 2a

Signature (see instructions)

Date

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

Spouse's signature

Date

For Privacy Act and Paperwork Reduction Act Notice, see page 2.

Cat. No. 37667N
Section references are to the Internal Revenue Code unless otherwise noted.

Future Developments
For the latest information about Form 4506-T and its instructions, go to www.irs.gov/form4506t. Information about any recent developments affecting Form 4506-T (such as legislation enacted after we released it) will be posted on that page.

General Instructions
Caution. Do not sign this form unless all applicable lines have been completed.
Purpose of form. Use Form 4506-T to request tax return information. You can also designate (on line 5) a third party to receive the information. Taxpayers using a tax year beginning in one calendar year and ending in the following year (fiscal tax year) must file Form 4506-T to request a return transcript.
Note. If you are unsure of which type of transcript you need, request the Record of Account, as it provides the most detailed information.
Tip. Use Form 4506, Request for Copy of Tax Return, to request copies of tax returns.
Automated transcript request. You can quickly request transcripts by using our automated self-help service tools. Please visit us at IRS.gov and click on "Get Transcript of Your Tax Return." Use the "Tools" or call 1-800-908-9946.
Where to file. Mail or fax Form 4506-T to the address below for the state you lived in, or the state your business was in, when that return was filed. There are two address charts: one for individual transcripts (Form 1040 series and Form W-2) and one for all other transcripts. If you are requesting more than one transcript or other product and the chart below shows two different addresses, send your request to the address based on the address of your most recent return.
Chart for individual transcripts (Form 1040 series and Form W-2 and Form 1099)
If you filed an individual return and lived in:  
- Alabama, Alaska, Arizona, Arkansas, California, Colorado, Idaho, Illinois, Indiana, Iowa, Kansas, Kentucky, Louisiana, Maine, Maryland, Massachusetts, Michigan, Minnesota, Mississippi, Missouri, Montana, Nebraska, Nevada, New Mexico, North Dakota, Ohio, Oklahoma, Oregon, South Dakota, Tennessee, Texas, Utah, Virginia, or Wisconsin  
- A.P.O. or F.P.O. address

Mail or fax to:  
- Internal Revenue Service RAIVS Team Stop 6716 AUSC Austin, TX 73301
- Internal Revenue Service RAIVS Team P.O. Box 145500 Ogden, UT 84409

Chart for other transcripts
If you lived in or your business was in:  
- Alabama, Alaska, Arizona, Arkansas, California, Colorado, Florida, Hawaii, Idaho, Iowa, Kansas, Louisiana, Minnesota, Mississippi, Missouri, Montana, Nebraska, Nevada, New Mexico, North Dakota, Oklahoma, Oregon, South Dakota, Texas, Utah, Washington, Wyoming, a foreign country, or A.P.O. or F.P.O. address

Mail or fax to:  
- Internal Revenue Service RAIVS Team P.O. Box 9941 Mail Stop 6734 Cincinnati, OH 45250
- Internal Revenue Service RAIVS Team Stop 2800 F Kansas City, MO 64999
- 801-620-6922

Line 1b. Enter your employer identification number (EIN) if your request relates to a business return. Otherwise, enter the first social security number (SSN) or your individual taxpayer identification number (ITIN) shown on the return. For example, if you are requesting Form 1040 that includes Schedule C (Form 1040), enter your SSN.
Line 3. Enter your current address. If you use a P.O. box, include it on this line.
Line 4. Enter the address shown on the last return filed if different from the address entered on line 3.
Note. If the address on lines 3 and 4 are different and you have not changed your address with the IRS, file Form 8822, Change of Address. For a business address, file Form 8822-B, Change of Address or Responsible Party—Business.
Line 6. Enter only one tax form number per request.
Signature and date. Form 4506-T must be signed and dated by the taxpayer listed on line 1a or 2a. If you completed line 5 requesting the information be sent to a third party, the IRS must receive Form 4506-T within 120 days of the date signed by the taxpayer or it will be rejected. Ensure that all applicable lines are completed before signing.
Individuals. Transcripts of jointly filed tax returns may be furnished to either spouse. Only one signature is required. Sign Form 4506-T exactly as your name appeared on the original return. If you changed your name, also sign your current name.
Corporations. Generally, Form 4506-T can be signed by: (1) an officer having legal authority to bind the corporation, (2) any person designated by the board of directors or other governing body, or (3) any officer or employee on written request by any principal officer and attested to by the secretary or other officer.