



Financial Aid • Emma B. Lommasson Center 32 Campus Drive, Missoula, MT 59812 • Ph: 406-243-5373 • Fax: 406-243-4903 • www.umt.edu/financialaid

New federal regulations require some students, parents and/or spouses to submit proof that they did not file a federal tax return. This proof must come directly from the Internal Revenue Service (IRS) in the form of an **IRS Verification of Non-Filing Letter**. Below we have provided some instructions on how to request this documentation from the IRS:

- 1) Call 1-800-829-3676 and follow the instructions below:
 1. Choose language of preference
 2. Select option #3 for "other tax information"
 3. Select option #1 for personal and individual tax questions"
 4. You will then be connected with an IRS employee. Request a Verification of Non-filing Letter. If you are also needing a W-2, request a Wage Transcript as well.
 5. You will then be transferred to the appropriate department to process your request.

Note: You can request that the documents be faxed or mailed. Mailed documents arrive in 5-10 days.

- 2) Request the 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, we recommend using the much faster "**Get Transcript Online**" option at www.irs.gov/transcript.
 - b. If the non-filer does not have their own credit accounts or has never filed taxes with the IRS, they must complete the **IRS Form 4506-T** using the instructions below:
 - i. Go to <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>
 - ii. On **line, 5b** enter the student's UM student ID number to create a unique **Customer File Number that will appear on the transcript**. The customer file number should not contain a SSN.
 - iii. Check **box 7 for Verification of Non-Filing letter**
 - iv. On line 9 enter **December 31st** for year or period requested (12/31/XXXX)
 - v. Check the box in the signature area to acknowledge you have the authority to sign and request the information. The IRS will not process the form if this box is unchecked.
 - vi. Sign and date the form
 - vii. Fax or mail the form to the IRS using the instructions located on the 2nd page of the form.

After receiving your Non-Filing letter from the IRS:

- 3) Make sure that the document sent by the IRS includes the non-filer's partial name and partial social security number (SSN).
- 4) Keep a copy of the letter for your records.
- 5) Write the **student's name** and **UM ID #** on the IRS letter.
- 6) Submit a copy of the letter to the UM Financial Aid Office.