

IRS Tax Filers—Guidance for those who filed a 2020 IRS Tax Return

Option 1: Use the IRS Data Retrieval Tool (IRS DRT) to electronically transfer federal tax return information to the FAFSA.

1. Log in to your 2022-23 FAFSA to make a correction or to start a new application at fafsa.gov.
2. In the financial information sections of the FAFSA, you will see a “Link to IRS” button if you are eligible to use the IRS DRT. The IRS DRT can be used by both students and parents.
3. Click the “Link to IRS” button and log in with your FSA ID to be transferred to the IRS to retrieve your info.
4. Once at the IRS site, enter your information exactly as it appears on your federal income tax return and click the “Submit” button.
5. Check the “Transfer My Tax Information into the FAFSA form” box, and click the “Transfer Now” button.
6. You will know that your federal tax return information has been successfully transferred because the words “Transferred from the IRS” will display in place of the IRS information in your FAFSA form.
7. Navigate to the “Sign & Submit” page, read the certification statement and check the box indicating that you agree with the statement. Then select “Submit My FAFSA” at the bottom of the page.

For your protection, your tax information will not be displayed on either the IRS site or fafsa.gov.

Option 2: Submit a signed copy of your 2020 Federal Tax Return

Copies of tax returns used for FAFSA verification purposes must be signed. A typed signature is not acceptable. If choosing this option, you must submit copies of the 2020 Form 1040 pages 1 & 2 (with real signatures) along with Schedules 1, 2, 3, C, F and K-1 (Form 1065).

Option 3: Obtain a Free Tax Return Transcript—If unable to use IRS DRT, select one of the following methods:

- **Request at the IRS website www.irs.gov** by selecting “**Get Your Tax Record**” which brings you to the page “Welcome to Get Transcript” where you can select one of these options:

Get Transcript ONLINE Refer to “**What You Need**” to register and use this service. **Request a “Tax Return Transcript”—NOT Account Transcript** for Tax Year “**2020**.”

Get Transcript by MAIL Joint filers must provide information for the first person (primary taxpayer) listed on the tax return; enter SSN, date of birth, and address (shown on your latest tax return); click “continue”; for Type of Transcript select “**Tax Return Transcript**”— **NOT Account Transcript**; for Tax Year “**2020**.”

- **Request by calling the IRS Transcript Order Line at 1-800-908-9946**
Joint filers must provide information for the first person (primary taxpayer) listed on the tax return. You will be given an online option but continue to hold. You will be prompted to enter tax filer’s SSN, address; **select “Option 2”** to request an **IRS Tax Return Transcript—NOT Account Transcript**; and then enter “**2020**.”
- **Paper Request Form—Download IRS Form 4506T-EZ (Not 4506-T) at www.irs.gov/forms-pubs/form-4506t-ez**
A joint tax filer listed second (secondary taxpayer) on the return is unable to obtain a “Tax Return Transcript” by mail or phone. Use Get Transcript Online or Form 4506-T. Instructions can be found online.
Note: The IRS cannot send the Tax Return Transcript to the university. It will be mailed to you.

IRS Non-Tax Filers—Guidance for those who did not and were not required to file a 2020 IRS Tax Return

The U.S. Department of Education requires non-tax filers to submit an IRS Verification of Non-filing Letter. You can use “**Get Transcript Online**” or **IRS Form 4506-T** by mail. Instructions follow.

- Download IRS Form 4506-T (Not 4506T-EZ) at www.irs.gov/pub/irs-pdf/f4506t.pdf
- Complete Lines 1a through 4. Leave Line 5 blank since the IRS will not mail the letter directly to the university
- Check the box on the right side of Line 7 – Verification of Non-filing
- On Line 9, Year or period requested, enter 12/31/2020
- Provide the appropriate signature(s)
- Mail or fax the form to the appropriate address/fax number on page 2 under the heading “Chart for individual transcripts.”

Once you receive the Verification of Non-filing Letter from the IRS, please submit a copy along with all other requested documents to the Student Financial Services Center.

Getting FAFSA Help at <https://fafsa.gov>

The U.S. Department of Education provides technical support to resolve issues with the FAFSA process, IRS Data Retrieval Tool, and the FSA ID. Click on the Help icon  for assistance with general questions or select 'Contact Us' then Click the 'Federal Student Aid Information' link. You will be presented with the options to Chat with a live agent, email, or phone.

IRS Address Matching Problem Tips

- The address you entered must be an exact match with the IRS. Use the address from your 2020 Federal Income Tax Return.
- Sometimes the IRS takes the address from your tax return and standardizes it to conform to the United States Postal Service (USPS) specifications. To look up your standardized address, go to <https://tools.usps.com/go/ZipLookupAction!input.action>
- If your address has changed and you are requesting a Transcript by mail or phone, file IRS Form 8822 Change of Address.
- If all attempts at address authentication fail, contact the IRS.gov Website Help Desk toll-free at 1-800-876-1715.

Additional Information

- To verify that an IRS or pension distribution was rolled over, submit 2020 IRS 1099-R Form(s).
- Married tax filers who file separate returns must submit a Tax Return Transcript for each filer.

For a tax filer who had amended the original tax return, the IRS Data Retrieval Tool cannot be utilized.

Documentation Requirements—

- An IRS Tax Return Transcript **or** an acceptable IRS alternative, such as a Record of Account Transcript (**not** Tax Account Transcript); **and**
- A **signed** copy (front and back) of the 2020 IRS Form 1040X (Amended U.S. Individual Income Tax Return) filed with the IRS; **and**
- A copy of 2020 IRS Form W-2 for each source of employment income and relevant Schedules C, F, K-1 (Form 1065).

For a tax filer who has been, or likely was, a victim of IRS tax-related identity theft, a special transcript is available.

Tax filers who, because of IRS identity theft, are denied an IRS Tax Return Transcript using one of the regular request processes must contact the Identity Protection Specialized Unit (IPSU) at 1-800-908-4490. Filers who believe they are victims can also call the (IPSU) at 1-800-908-4490 or go directly to the ID theft website <http://www.irs.gov/uac/Identity-Protection>. Once IPSU authenticates the tax filer's identity, the tax filer must request that the IRS mail to them the required alternate transcript. The data format differs from the standard IRS Tax Return Transcript.

Documentation Requirements—

- A 2020 TRDBV (Tax Return DataBase View Transcript) or TRDPG (online page view of TRDBV) obtained from the IPSU; **and**
- A **signed and dated** statement from the tax filer indicating that he or she was a victim of IRS tax-related identify theft and that the IRS has been made aware of the tax-related identity theft; **and**
- A copy of 2020 IRS Form W-2 for each source of employment income and relevant Schedules C, F, K-1 (Form 1065).

Guidance for submitting 2020 income information for residents of foreign countries.

Documentation Requirements—

- A copy of the W-2, Wage and Tax Statement, or equivalent document from each employer for the tax year 2020; **and**
- A Transcript (**only if it can be obtained at no cost**) from the relevant taxing authority listing tax account information for the tax year 2020. This document must include an English translation and monetary conversion rate as of the date of FAFSA filing; **or**

If a free transcript is not available—

- Documentation that the tax authority charges a fee to obtain that information; **and**
- A **signed** copy of the original tax return. This document must include an English translation and the monetary conversion rate as of the date of FAFSA filing; **and**
- A copy of the W-2, Wage and Tax Statement, or equivalent document from each employer for the tax year 2020.

Frequently Asked Questions about the Submission of 2020 IRS Tax Data

Q. How do I submit documents?

A. Documents can be mailed to the Student Financial Services Center, 1400 Townsend Dr, Houghton MI 49931; faxed to 906-487-3042 or uploaded through mymichigantech.mtu.edu. **Please do not submit cell phone photos of documents.** Cell phone photos are not legible in our document imaging system. To prevent processing delays, all requested forms must be fully completed. Sign all areas where a signature is requested. IRS Tax Return Transcripts are two-sided pages. Be sure to send all pages of the document and have the student's name on each piece of information.

Q. If I use the FAFSA IRS Data Retrieval Tool (IRS DRT) or submit an IRS Tax Return Transcript, do I still have to submit IRS W-2 Form(s)?

A. Yes. Neither provide individual earnings data or the value of tax-deferred income [401(k), 403(b), 408(k)(6), 501(c)(18)(D), 457(b) and 408(p) SIMPLE plans]. The FAFSA considers payments to tax-deferred pension and retirement savings plans sources of untaxed income.