

IRS Tax Filers—Guidance for those who filed a 2022 IRS Tax Return

Option 1: Use the IRS Direct Data Transfer to electronically transfer federal tax return information to the FAFSA.

1. Log in to your 2024-25 FAFSA to correct/edit an existing form at studentaid.gov.
2. Navigate through the initial questions
 - A. As the **Student**, watch for *Provide Consent or Be Ineligible for Federal Student Aid*
 - B. As a **Parent Contributor**, watch for *Provide Consent or the Student Will Be Ineligible for Federal Student Aid*
3. Provide consent and tax data (if available) will be automatically pulled. Additional income questions may be presented at this time.
4. Continue to the *Sign & Complete* page, read the certification statement and click **Sign and Submit** at the bottom of the page.

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

Option 2: Submit a signed copy of your 2022 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 2022 Form 1040 pages 1 & 2 (with real signatures) along with Schedules 1, 2, 3, C, and F, if applicable. Be sure to include ALL pages. Please print the student's name and ID number at the top of the form.

Option 3: Obtain a Free Tax Return Transcript—If unable to use Option 1 or 2 above, 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 where you can select one of these options:

Get Transcript ONLINE Sign in or create a new account. **Request a “Tax Return Transcript”—NOT Account Transcript for Tax Year “2022.”**

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 “2022.”**”

- **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 “**2022.**”
- **Paper Request Form—Download IRS Form 4506T-EZ (Not 4506-T) at irs.gov/pub/irs-pdf/f4506tez.pdf**
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.

How do I submit documents?

Documents can be mailed to the Financial Aid Office, 1400 Townsend Dr, Houghton MI 49931; faxed to 906-487-3042 or uploaded through apps.mtu.edu/finaid. **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 and ID number on all documents.

Getting FAFSA Help at studentaid.gov

The U.S. Department of Education provides technical support to resolve issues with the FAFSA process, IRS Direct Data Transfer, and the FSA ID. Click on the **Help Center** for assistance with general questions.

IRS Address Matching Problem Tips

- The address you entered must be an exact match with the IRS. Use the address from your 2022 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 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 2022 IRS 1099-R Form(s).
- Married tax filers who file separate returns must submit a Tax Return Transcript for each filer or a signed copy of the 2022 Form 1040 (pages 1 and 2) along with schedules 1, 2, 3, C, and F, if applicable, for each filer.

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 irs.gov/uac/Identity-Theft-Central. 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 2022 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 identity theft and that the IRS has been made aware of the tax-related identity theft.

Guidance for submitting 2022 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 2022; **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 2022. 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 2022.