

Southwestern Michigan College

How to Provide Student Tax Information for FAFSA Verification Amended Return

If you amended your 2020 federal tax return, you must provide documentation of your original tax return, as well as the amended return. Tax-filers with amended returns must submit the following to the financial aid office:

- A signed copy of the 1040X form (amended return) **AND**
- Either a 2020 tax return transcript **OR** successful use of the IRS Data Retrieval Tool in the FAFSA

The best way to verify income is by using **the IRS Data Retrieval Tool** that is part of FAFSA on the Web. If you have not already used the tool, go to [FAFSA.gov](https://fafsa.gov), log in to your FAFSA, select “Make FAFSA Corrections,” and navigate to the Financial Information section of the form. From there, follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool to transfer 2020 IRS income tax information into the FAFSA. Once the tax information has been transferred, re-submit the FAFSA.

If you are unable or choose not to use the IRS Data Retrieval Tool in FAFSA on the Web, then you must submit a **2020 IRS tax return transcript** to the school—not a photocopy of the income tax return. A 2020 IRS tax return transcript may be obtained through:

- **Get Transcript Online-** Go to www.irs.gov, under the Tools heading, click “Get a Tax Transcript.” Click “Get Transcript ONLINE.” The student will need to register an account in order to use this service, but if successful can access a pdf copy of their tax return transcript immediately. Make sure to request the “IRS Tax Return Transcript” and **NOT** the “IRS Tax Account Transcript.”
- **Get Transcript by Mail-** Go to www.irs.gov, under the Tools heading, click “Get a Tax Transcript.” Click “Get Transcript by MAIL.” Make sure to request the “IRS Tax Return Transcript” and **NOT** the “IRS Tax Account Transcript.” Allow 5-10 business days for delivery.
- **Automated Telephone Request-** 1-800-908-9946 to request a transcript by mail. Allow 5-10 business days for delivery.
- **Paper Request Form-** IRS Form 4506-T EZ or IRS form 4506-T (available at www.irs.gov).

***Note:** If you are married, and you and your spouse filed separate 2020 IRS income tax returns, the IRS DRT cannot be used and the IRS Tax Return Transcript(s) must be provided for each. Notify the financial aid office if you had a change in marital status **after December 31st, 2020.**

2020 tax return transcripts and signed 1040X forms can be mailed to SMC’s financial aid office at:

Southwestern Michigan College Financial Aid
58900 Cherry Grove Rd.
Dowagiac, MI 49047

Transcripts and forms can also be emailed to finaid@swmich.edu, or faxed to 269-783-2114. **Please note that submission of this form electronically should be encrypted to protect any personal or confidential information.** Please be sure to include your name and SMC ID number on each document. Students should submit required documentation to the financial aid office within two weeks of this request, or as soon as the documents are received from the IRS, to avoid delays in processing. Financial aid eligibility cannot be determined until all required information has been received and reviewed.

Call the financial aid office at 269-783-2143 if you have any questions about this process.