

## Instructions for Submitting Extension Information and Amended Tax Returns

If you were selected for verification and are required to provide income tax information, and you have filed a tax extension or an amended return, see the applicable instructions below.

**IRS Extension-** If you filed an extension for your 2017 taxes and have subsequently submitted a complete return, you need to use the IRS Data Retrieval process or submit an IRS Tax Transcript to the Financial Aid Office. If you have been granted an extension beyond the automatic six-month extension, you will need to provide the following:

- A copy of the IRS form 4868, "Application for Automatic Extension of Time to File US Individual Income Tax Return," that was filed with the IRS for tax year 2017.
- A copy of IRS W-2 for each source of employment income received for the tax year 2017
- If self-employed, a signed statement certifying the amount of the Adjusted Gross Income (AGI) and the income tax paid for the tax year 2017
- A copy of the IRS's approval of an extension beyond the automatic six-month extension if you requested an additional extension of the filing time for tax year 2017.
- Verification of Non-filing Letter (confirming that the tax return has not yet been filed) from the IRS dated after October 1, 2017.

**Amended Return-** If you filed an amended income tax return for the 2017 tax year, provide the following:

- A signed copy of the 2017 IRS Form 1040X, "Amended US Individual Income Tax Return," that was filed with IRS
- A 2017 IRS Tax Return Transcript (that will include information for the original tax return and does not need to be signed)

**IRS Tax Transcripts-** If you need to acquire a tax transcript follow one of the sets of instructions below. Most requests are processed within 10 days.

- You may access a PDF version of the required documents through the [IRS website](http://www.irs.gov/Individuals/Get-Transcript) (www.irs.gov/Individuals/Get-Transcript). To access your records you will need:
  - A non-prepaid cell phone in your name
  - To have had a credit card, car loan, home loan, or another bank loan to prove identity
- IRS Tax Transcripts can be ordered using the Get Transcript by Mail service.
  1. Call the IRS at 1-800-908-9946 (on the automated menu):
  2. Enter and verify your Social Security Number
  3. Enter in your street address number
  4. Select Option #2 to request a Return Transcript
  5. Enter and verify the year of your needed Return Transcript (for a 2019-20 verification, request the 2017 tax year)
- You may complete Form 4506T: *Request for Transcript of Tax Return*, and mail it or fax it to the address/phone number indicated on the form. To request a free Return Transcript check **box 6a**.

A printable PDF of Form 4506-T is available on [UM's financial aid website](http://www.umt.edu/financialaid/forms.php) (www.umt.edu/financialaid/forms.php) and on the [IRS website](http://www.irs.gov/pub/irs-pdf/f4506t.pdf) (www.irs.gov/pub/irs-pdf/f4506t.pdf).

**IRS W-2 (Wage) Transcripts and Statements of Non-filing-** If you do not have copies of your W-2's or need to acquire a statement of non-filing letter, follow one of the sets of instructions below. Most requests are processed within 10 days.

- You may access a PDF version of the required documents through the [IRS website](http://www.irs.gov) ([www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript)). If you have never filed a tax return, you will need to use one of the other methods to get a W-2 transcript or statement of non-filing. To access your records you will need:
  - A non-prepaid cell phone in your name
  - To have had a credit card, car loan, home loan, or another bank loan to prove identity
- IRS Wage Transcript and/or a Verification of Non-filing letter.
  1. Call 1-800-829-3676 and follow the instructions below:
  2. Choose language preference
  3. Select option #3 for "other tax information"
  4. Select option #1 for "personal and individual tax questions"
  5. 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.
  6. You will then be transferred to the appropriate department to process your request.
- You may complete Form 4506-T: Request for Transcript of Tax Return. To request a free W-2/Wage Transcript and Verification of non-filing check box 7 and 8. Fax or mail the form to the number or address indicated on the form.

A printable PDF of Form 4506-T is available on [UM's financial aid website](http://www.umt.edu/finaid/forms.php) ([www.umt.edu/finaid/forms.php](http://www.umt.edu/finaid/forms.php)) and on the [IRS website](http://www.irs.gov/pub/irs-pdf/f4506t.pdf) ([www.irs.gov/pub/irs-pdf/f4506t.pdf](http://www.irs.gov/pub/irs-pdf/f4506t.pdf)).

To contact the IRS for general questions call 1-800-829-1040 or visit the [IRS website](http://www.irs.gov) ([www.irs.gov](http://www.irs.gov)).