

ACCEPTABLE TAX DOCUMENTATION

PLEASE USE ONE OF THE FOLLOWING METHODS TO SATISFY THE STUDENT/PARENT/SPOUSE TAX REQUIREMENT

METHOD 1--IRS DATA RETRIEVAL

The IRS Data Retrieval Tool (DRT) process allows a student and his/her parent(s) to transfer IRS tax information directly from the IRS into the FAFSA. Go to the "Financial Information" section of the FAFSA to complete the transfer for the student and parents (if applicable).

OR

METHOD 2--SUBMIT A SIGNED COPY OF FEDERAL 1040 TAX RETURN FORM AND ALL APPROPRIATE SCHEDULES

- Submit the federal 1040 form, not the state form (see example below)
- Ensure it's signed by one of the filers
- Ensure all applicable Schedules are also submitted (see examples below)

1040 Form Example

1040 Department of the Treasury - Internal Revenue Service **2018** (OMB No. 1545-0047) (Do not write or stamp in this space)

Filing status: Single Married filing jointly Married filing separately Head of household Qualifying widow(er)

Your first name and initial: [] Last name: [] Your social security number: []

Your standard deduction: Someone can claim you as a dependent You were born before January 2, 1954 You are blind

Spouse's standard deduction: Someone can claim your spouse as a dependent Spouse was born before January 2, 1954 Full year health care coverage or average (see inst.)

Spouse is blind: Spouse files on a separate return or you were dual-status alien

Home address (number and street). If you have a P.O. box, see instructions. Apt. no. **Presidential Election Campaign** (see inst.) Yes No Spouse

City, town or post office, state, and ZIP code. If you have a foreign address, attach Schedule B.

Dependents (see instructions):

(1) First name	Last name	(2) Social security number	(3) Relationship to you	(4) If qualifies for (see inst.)
				Child tax credit
				Credit for other dependents

Sign Here (see inst.)
 Your signature: [] Date: [] Your occupation: []
 If the IRS sent you an Identity Protection PIN, enter it here (see inst.): []
 If the IRS sent you an Identity Protection PIN, enter it here (see inst.): []
 Spouse's signature: [] Date: [] Spouse's occupation: []
 If the IRS sent you an Identity Protection PIN, enter it here (see inst.): []
 If the IRS sent you an Identity Protection PIN, enter it here (see inst.): []

Paid Preparer Use Only
 Preparer's name: [] Preparer's signature: [] Preparer's title: []
 Preparer's address: [] Preparer's phone no.: [] Preparer's fax no.: []
 Preparer's EFIN: [] Preparer's ID: [] Preparer's signature: []

For Disclosures, Privacy Act, and Paperwork Reduction Act Notice, see separate instructions. Cat. No. 11308B Form **1040** (2018)

Form **1040** (2018) Page **2**

1 Wages, salaries, tips, etc. Attach Form(s) W-2 **1**

2a Tax-exempt interest **2a** **2** Taxable interest **2b**

3a Qualified dividends **3a** **3** Ordinary dividends **3b**

4a IRA, pension, and annuities **4a** **4** Taxable amount **4b**

5a Social security benefits **5a** **5** Taxable amount **5b**

6 Total income. Add lines 1 through 5. Add any amount from Schedule 1, line 22 **6**

7 Adjusted gross income. If you have no adjustments to income, enter the amount from line 6; otherwise, subtract Schedule 1, line 3d, from line 6 **7**

8 Standard deduction or itemized deductions (see instructions) **8**

9 Qualified business income deduction (see instructions) **9**

10 Taxable income. Subtract lines 8 and 9 from line 7. If zero or less, enter -0- **10**

11 Tax (see inst.) (check if any from: **1** Form(s) 9874 **2** Form 9872 **3**) **11**

a Add any amount from Schedule 2 and check here **11**

b Child tax credit for other dependents **b** Add any amount from Schedule 3 and check here **12**

12 Subtract line 12 from line 11. If zero or less, enter -0- **12**

13 Other taxes. Attach Schedule 4 **13**

14 Total tax. Add lines 10 and 14 **14**

15 Federal income tax withheld from Forms W-2 and 1099 **15**

16 Refundable credits: **a** EIC (see inst.) **b** SCh. 8812 **c** Form 8832 **16**

17 Add any amount from Schedule 5 **17**

18 Add lines 10 and 17. These are your total payments **18**

19 Refund **19**

If line 10 is more than line 15, subtract line 10 from line 18. This is the amount you overpaid **19**

20a Amount of line 19 you want refunded to you. If Form 8878 is attached, check here **20a**

b Routing number **b** **c** Type: Checking Savings **20b**

d Account number **d**

21 Amount of line 19 you want applied to your 2018 estimated tax **21**

22 Amount you owe. Subtract line 18 from line 15. For details on how to pay, see instructions **22**

23 Estimated tax penalty (see instructions) **23**

Go to www.irs.gov/om/1040 for instructions and the latest information. Form **1040** (2018)

Schedule 1 Example

SCHEDULE 1 (Form 1040)		Additional Income and Adjustments to Income		OMB No. 1545-0074	
Department of the Treasury Internal Revenue Service		▶ Attach to Form 1040. ▶ Go to www.irs.gov/Form1040 for instructions and the latest information.		2018 Attachment Sequence No. 01	
Name(s) shown on Form 1040				Your social security number	
Additional Income	1-9b	Reserved		1-9b	
	10	Taxable refunds, credits, or offsets of state and local income taxes		10	
	11	Alimony received		11	
	12	Business income or (loss). Attach Schedule C or C-EZ		12	
	13	Capital gain or (loss). Attach Schedule D if required. If not required, check here <input type="checkbox"/>		13	
	14	Other gains or (losses). Attach Form 4797		14	
	15a	Reserved		15b	
	16a	Reserved		16b	
	17	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E		17	
	18	Farm income or (loss). Attach Schedule F		18	
	19	Unemployment compensation		19	
	20a	Reserved		20b	
21	Other income. List type and amount ▶		21		
22	Combine the amounts in the far right column. If you don't have any adjustments to income, enter here and include on Form 1040, line 6. Otherwise, go to line 23		22		
Adjustments to Income	23	Educator expenses	23		
	24	Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106	24		
	25	Health savings account deduction. Attach Form 8889	25		
	26	Moving expenses for members of the Armed Forces. Attach Form 3903	26		
	27	Deductible part of self-employment tax. Attach Schedule SE	27		
	28	Self-employed SEP, SIMPLE, and qualified plans	28		
	29	Self-employed health insurance deduction	29		
	30	Penalty on early withdrawal of savings	30		
	31a	Alimony paid b Recipient's SSN ▶	31a		
	32	IRA deduction	32		
	33	Student loan interest deduction	33		
	34	Reserved	34		
	35	Reserved	35		
	36	Add lines 23 through 35	36		

For Paperwork Reduction Act Notice, see your tax return instructions. Cat. No. 71479F Schedule 1 (Form 1040) 2018

Schedule 2 Example

SCHEDULE 2 (Form 1040)		Tax		OMB No. 1545-0074	
Department of the Treasury Internal Revenue Service		▶ Attach to Form 1040. ▶ Go to www.irs.gov/Form1040 for instructions and the latest information.		2018 Attachment Sequence No. 02	
Name(s) shown on Form 1040				Your social security number	
Tax	38-44	Reserved		38-44	
	45	Alternative minimum tax. Attach Form 6251		45	
	46	Excess advance premium tax credit repayment. Attach Form 8962		46	
	47	Add the amounts in the far right column. Enter here and include on Form 1040, line 11		47	

For Paperwork Reduction Act Notice, see your tax return instructions. Cat. No. 71478U Schedule 2 (Form 1040) 2018

Schedule 3 Example

SCHEDULE 3 (Form 1040)		Nonrefundable Credits		OMB No. 1545-0074	
Department of the Treasury Internal Revenue Service		▶ Attach to Form 1040. ▶ Go to www.irs.gov/Form1040 for instructions and the latest information.		2018 Attachment Sequence No. 03	
Name(s) shown on Form 1040				Your social security number	
Nonrefundable Credits	48	Foreign tax credit. Attach Form 1116 if required		48	
	49	Credit for child and dependent care expenses. Attach Form 2441		49	
	50	Education credits from Form 8863, line 19		50	
	51	Retirement savings contributions credit. Attach Form 8880		51	
	52	Reserved		52	
	53	Residential energy credit. Attach Form 5695		53	
	54	Other credits from Form a <input type="checkbox"/> 3800 b <input type="checkbox"/> 8801 c <input type="checkbox"/>		54	
55	Add the amounts in the far right column. Enter here and include on Form 1040, line 12		55		

For Paperwork Reduction Act Notice, see your tax return instructions. Cat. No. 71480G Schedule 3 (Form 1040) 2018

OR

METHOD 3--IRS TAX RETURN TRANSCRIPT

You can request a transcript two ways:

- Online: www.irs.gov/Individuals/Get-Transcript
- Paper process (IRS Form 4506T-EZ or Form 4506-T)

Online Transcript Request--Available Immediately

1. To request a tax return transcript, go to <https://www.irs.gov/individuals/get-transcript>
2. Click "Get Transcript Online" button. If a returning user, log in with your username. If you are a new user, you will have to create an account. In order to use the Get transcript online option you will need one of the following:
 - Credit Card
 - Mortgage or Home Equity Loan
 - Home Equity Line of Credit
 - Auto Loan

In addition, you will need a mobile phone number that your name is associated with. If you do not have a mobile phone number associated with your name, you can request an activation code via mail. The activation code takes 10-15 days to receive. If you have to wait on an activation code, please follow the instructions below to request a tax return transcript by mail; please allow 10-15 days for documents to arrive by mail.

Online Transcript Request--Mailed to You

1. To request a tax return transcript, go to <https://www.irs.gov/individuals/get-transcript>
2. Click "Get Transcript by Mail" button
3. Fill in Social Security Number, Date of Birth, Street Address, and Zip Code
4. Click "Continue"
5. Type of Transcript: "Return Transcript"

You should receive the transcripts in 10 to 15 days via mail.

Notes:

- If you had a change of address, you will need to contact the IRS regarding this situation.
- If you are a victim of identity theft, please contact the IRS at 1-800-908-4490 for assistance in obtaining your documents.
- If you have amended your tax return, you will need to provide a copy of your tax return transcript as well as a SIGNED copy of the Federal form 1040X (amended return).
- If an applicant has reported an IRA rollover on his or her federal tax return, this information should be brought to the attention of the Financial Aid Office.