

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

Form 1040 U.S. Individual Income Tax Return **2019**

Filing Status: Single Married filing jointly Married filing separately (MFS) Head of household (HOH) Qualifying widow(er) (QW)

Standard Deduction: Someone can claim You as a dependent Your spouse as a dependent Spouse itemizes on a separate return or you itemize a dual-status alien

Income: 1 Wages, salaries, tips, etc. Attach Form(s) W-2: 1
2a Tax-exempt interest: 2a
3a Qualified dividends: 3a
4a IRA distributions: 4a
5a Pensions and annuities: 5a
6a Social security benefits: 6a
6 Capital gain or (loss). Attach Schedule D if required. If not required, check here: 6
7a Other income from Schedule 1, line 9: 7a
8a Add lines 1, 2a, 3a, 4a, 5a, 6a, and 7a. This is your **total income**: 8a
8b Adjustments to income from Schedule 1, line 22: 8b
9 Subtract line 8a from line 7a. This is your **adjusted gross income**: 9
10 Qualified business income deduction. Attach Form 8995 or Form 8995-A: 10
11a Add lines 9 and 10: 11a
11b **Taxable income.** Subtract line 11a from line 8a. If zero or less, enter -0-: 11b

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Refund: 20 If line 19 is more than line 16, subtract line 16 from line 19. This is the amount you **ever paid**: 20
21a Amount of line 20 you want **refunded to you**. If Form 8888 is attached, check here: 21a
21b Routing number: 21b
21c Account number: 21c
21d Type: Checking Savings: 21d

Amount You Owe: 22 Amount of line 20 you want **applied to your 2020 estimated tax**: 22
23 Amount you **owe**. Subtract line 19 from line 16. For details on how to pay, see instructions: 23
24 Estimated tax penalty (see instructions): 24

Sign Here: Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Signatures: Your signature: _____ Date: _____ Your occupation: _____
Spouse's signature: _____ Date: _____ Spouse's occupation: _____

Paid Preparer Use Only: Preparer's name: _____ Preparer's signature: _____ Date: _____ PTIN: _____
Firm's name: _____ Firm's address: _____ Phone no.: _____ Firm's EIN: _____

Schedule 1 Example

SCHEDULE 1 (Form 1040 or 1040-SR)		Additional Income and Adjustments to Income		OMB No. 1545-0074
Department of the Treasury Internal Revenue Service		▶ Attach to Form 1040 or 1040-SR. ▶ Go to www.irs.gov/Form1040 for instructions and the latest information.		2019 Attachment Sequence No. 01
Name(s) shown on Form 1040 or 1040-SR			Your social security number	
At any time during 2019, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency? <input type="checkbox"/> Yes <input type="checkbox"/> No				
Part I Additional Income				
1	Taxable refunds, credits, or offsets of state and local income taxes			1
2a	Alimony received			2a
b	Date of original divorce or separation agreement (see instructions) ▶			4
3	Business income or (loss). Attach Schedule C			3
4	Other gains or (losses). Attach Form 4797			4
5	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E			5
6	Farm income or (loss). Attach Schedule F			6
7	Unemployment compensation			7
8	Other income. List type and amount ▶			8
9	Combine lines 1 through 8. Enter here and on Form 1040 or 1040-SR, line 7a			9
Part II Adjustments to Income				
10	Educator expenses			10
11	Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106			11
12	Health savings account deduction. Attach Form 8889			12
13	Moving expenses for members of the Armed Forces. Attach Form 3903			13
14	Deductible part of self-employment tax. Attach Schedule SE			14
15	Self-employed SEP, SIMPLE, and qualified plans			15
16	Self-employed health insurance deduction			16
17	Penalty on early withdrawal of savings			17
18a	Alimony paid			18a
b	Recipient's SSN			
c	Date of original divorce or separation agreement (see instructions) ▶			
19	IRA deduction			19
20	Student loan interest deduction			20
21	Tuition and fees. Attach Form 8917			21
22	Add lines 10 through 21. These are your adjustments to income. Enter here and on Form 1040 or 1040-SR, line 8a			22
For Paperwork Reduction Act Notice, see your tax return instructions. Cat. No. 71479F Schedule 1 (Form 1040 or 1040-SR) 2019				

Schedule 2 Example

SCHEDULE 2 (Form 1040 or 1040-SR)		Additional Taxes		OMB No. 1545-0074
Department of the Treasury Internal Revenue Service		▶ Attach to Form 1040 or 1040-SR. ▶ Go to www.irs.gov/Form1040 for instructions and the latest information.		2019 Attachment Sequence No. 02
Name(s) shown on Form 1040 or 1040-SR			Your social security number	
Part I Tax				
1	Alternative minimum tax. Attach Form 6251			1
2	Excess advance premium tax credit repayment. Attach Form 8962			2
3	Add lines 1 and 2. Enter here and include on Form 1040 or 1040-SR, line 12b			3
Part II Other Taxes				
4	Self-employment tax. Attach Schedule SE			4
5	Unreported social security and Medicare tax from Form: a <input type="checkbox"/> 4137 b <input type="checkbox"/> 8919			5
6	Additional tax on IRAs, other qualified retirement plans, and other tax-favored accounts. Attach Form 5329 if required			6
7a	Household employment taxes. Attach Schedule H			7a
b	Repayment of first-time homebuyer credit from Form 5405. Attach Form 5405 if required			7b
8	Taxes from: a <input type="checkbox"/> Form 8959 b <input type="checkbox"/> Form 8960 c <input type="checkbox"/> Instructions; enter code(s)			8
9	Section 965 net tax liability installment from Form 965-A			9
10	Add lines 4 through 8. These are your total other taxes. Enter here and on Form 1040 or 1040-SR, line 15			10
For Paperwork Reduction Act Notice, see your tax return instructions. Cat. No. 71478U Schedule 2 (Form 1040 or 1040-SR) 2019				

Schedule 3 Example

SCHEDULE 3 (Form 1040 or 1040-SR)		Additional Credits and Payments		OMB No. 1545-0074
Department of the Treasury Internal Revenue Service		▶ Attach to Form 1040 or 1040-SR. ▶ Go to www.irs.gov/Form1040 for instructions and the latest information.		2019 Attachment Sequence No. 03
Name(s) shown on Form 1040 or 1040-SR			Your social security number	
Part I Nonrefundable Credits				
1	Foreign tax credit. Attach Form 1116 if required			1
2	Credit for child and dependent care expenses. Attach Form 2441			2
3	Education credits from Form 8863, line 19			3
4	Retirement savings contributions credit. Attach Form 8880			4
5	Residential energy credits. Attach Form 5695			5
6	Other credits from Form: a <input type="checkbox"/> 8800 b <input type="checkbox"/> 8801 c <input type="checkbox"/>			6
7	Add lines 1 through 6. Enter here and include on Form 1040 or 1040-SR, line 13b			7
Part II Other Payments and Refundable Credits				
8	2019 estimated tax payments and amount applied from 2018 return			8
9	Net premium tax credit. Attach Form 8962			9
10	Amount paid with request for extension to file (see instructions)			10
11	Excess social security and tier 1 RRTA tax withheld			11
12	Credit for federal tax on fuels. Attach Form 4136			12
13	Credits from Form: a <input type="checkbox"/> 2439 b <input type="checkbox"/> Reserved c <input type="checkbox"/> 8885 d <input type="checkbox"/>			13
14	Add lines 8 through 13. Enter here and on Form 1040 or 1040-SR, line 18d			14
For Paperwork Reduction Act Notice, see your tax return instructions. Cat. No. 71489Q Schedule 3 (Form 1040 or 1040-SR) 2019				

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.