

## 2026-2027 Tax Information Request Instructions

### DID YOU, YOUR SPOUSE, OR PARENT(S) FILE A 2024 FEDERAL TAX RETURN?

#### TAX FILER

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Yes, I/we filed taxes for 2024. :

1. Go to [www.studentaid.gov](http://www.studentaid.gov).
2. Log in using FSA ID Username, Email or Phone.
3. Click "Log In"
4. Upon reaching the tax information section authorize Department of Education to use IRS data
5. Sign the FAFSA

**Option 2:** Request your 2024 Federal Tax Return Transcript (not a tax account transcript) from

the IRS **Online** Go to <https://www.irs.gov/individuals/get-transcript>

- Create an ID.me login
- Once logged in click on tax record
- Click Get Transcript
- Select Reason: Income Verification
- If you or your parents' filing status is married filing separately, you must provide Federal Tax Return Transcripts for both you and your spouse or your parents.

**Option 3:** Obtain a signed copy of your 2024 Federal Tax Return **including all schedules that were filed** and provide it to the Financial Aid Office.

- If you choose option 3, you must provide a signed copy of the return that was filed and include all schedules that were filed along with the return.
- If your parents' filing status is married filing separately, you must provide signed copies of the Federal Tax Returns for both of your parents.
- If student is married and filing status is married filing separately, you must provide signed copies of the Federal Tax Returns for student and spouse.

#### NON-TAX FILER

No, I/we did not file taxes for 2024. Please see federal income filing requirements

below. Dependent Student non-tax filer

- Please complete, sign and return a copy of the 2026-2027 Dependent Verification Worksheet and provide copies of all W-2s, for all sources of income earned in 2024. The Non-Tax Filer Statement form can be found at: <http://www.stevenson.edu/admissions-aid/financial-aid-scholarships/forms/>. If you do not have your W-2s, you may request a Wage and Income transcript from the IRS using the 4506-T IRS form.

Independent Student non-tax filer

- Please complete, sign and return a copy of the 2026-2027 Independent Verification Worksheet and provide copies of all W-2s, for all sources of income earned in 2024. The Non-Tax Filer Statement form can be found at: <http://www.stevenson.edu/admissions-aid/financial-aid-scholarships/forms/>. If you do not have your W-2s, you may request a Wage and Income transcript from the IRS using the 4506-T IRS form.

Parent non-tax filer

- Please complete, sign and return a copy of the 2026-2027 Dependent Verification Worksheet and provide copies of all W2s, for all sources of income earned in 2024. The Non-Tax Filer Statement form can be found at: <http://www.stevenson.edu/admissions-aid/financial-aid-scholarships/forms/>. If you do not have your W-2s, you may request a Wage and Income transcript from the IRS using the 4506-T IRS form.

**Federal regulations require documentation from the IRS dated on or after October, 1, 2024 that indicates a 2024 income tax return was not filed with the IRS.**