

# 2023-2024 Tax Information Request Instructions

## DID YOU, YOUR SPOUSE, OR PARENT(S) FILE A 2021 FEDERAL TAX RETURN?

### TAX FILER

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Yes, I/we filed taxes for 2021. Please complete one of the three options listed below:

**Option 1:** Log into [www.studentaid.gov](http://www.studentaid.gov) and choose FAFSA Form then "Reviewing and Correcting Your FAFSA Form" In the Financial Information section, use the IRS Data Retrieval Tool to transfer your 2021 IRS income information. Your IRS income information is available three weeks after filing electronically and eight weeks after filing a paper return.

- Option 1 is not available in all circumstances. Please refer to the information below for details on the IRS Data Retrieval Tool. If you are unable to use this option, you must use Option 2 or 3.

**The IRS Data Retrieval Tool** allows your **2021** tax information to be imported directly from the IRS into your FAFSA application. If possible, utilize this option. If you have any difficulty using this tool, call FAFSA for support at 800-433-3243.

The **IRS Data Retrieval Tool** will *not* be available under the following circumstances:

- You have recently electronically filed your taxes (LESS than three weeks ago).
- A joint tax return was filed for 2021 and the student or the student's parents have filed the FAFSA with a marital status of separated, divorced, or widowed.
- If the tax filer is married to someone other than the individual included on the 2021 joint tax return.
- If the parent or student was not married in 2021 but is married at the time the FAFSA is filed. The current spouse's income must be reported on the FAFSA.
- If the parents or the student is married but filed tax returns separately.
- If an amended tax return was filed.
- If there is conflicting information on the FAFSA (for example: incorrect tax filing status, tax return status not "Already Complete")

### FAFSA-IRS Data Retrieval Step by Step

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. Select "Make Corrections".
5. Create a save key.
6. Click on the section **Parent Financials**
7. Change your answer to the question "For 2021, have you completed your IRS income tax return or another tax return" from "Will File" to "Already Completed".
8. Click on **Proceed to the IRS**
9. Follow Prompts to navigate the IRS website.
10. Once the tax information is added to the FAFSA, you will get a confirmation that the transfer was successful.
11. Dependent students will need to follow the steps separately for their own section and for a section for parents.

**Option 2:** Request your 2021 Federal Tax Return Transcript (not a tax account transcript) from the IRS and provide it to the Financial Aid Office. To access and print an official IRS Tax Transcript go to [www.irs.gov](http://www.irs.gov) and under the "File" menu select "Get Your Tax Record". At this website you will have the option to view and print your 2021 Federal Tax Return Transcript or you may request a paper copy mailed to you within 5-10 business days. Please note that the website is set up with a high degree of security to maintain your private information. Please follow each step and provide accurate answers when requested. You may also call 800-908-9946 to make the request for your tax information.

- If you choose option 2, please submit a copy of the Federal Tax Return Transcript (s) to the Stevenson University Financial Aid Office.
- 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.
- If you filed or plan to file an amended tax form, you will need to submit:
  - 1) a signed copy of your 2021 tax form (1040) or the Federal Tax Return Transcript
  - 2) a signed amended form 1040X
  - 3) a completed and signed 4560T-EZ form

**Option 3:** Obtain a signed copy of your 2021 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**

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No, I/we did not file taxes for 2021. Please see federal income filing requirements below.

### Dependent Student non-tax filer

- Please complete, sign and return a copy of the 2023-2024 Dependent Student Non-Tax Filer Statement and provide copies of all W-2s, for all sources of income earned in 2021. 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 2023-2024 Independent Student Non-Tax Filer Statement and provide copies of all W-2s, for all sources of income earned in 2021. 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 2023-2024 Parent Non-Tax Filer Statement and provide copies of all W-2s, for all sources of income earned in 2021. 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, 2022 that indicates a 2021 income tax return was not filed with the IRS. See the reverse side of the 2023-2024 Independent Student or Parent Non-Tax Filer Statement form for instructions in obtaining this documentation.**