

## 2023-2024 Tax Document Guide

**IMPORTANT:** When submitting your IRS tax return or transcript(s) to the Office of Scholarships and Financial Aid make sure you place your student name and campus ID number on each page so we know that it is part of your financial aid record. Not doing so may cause a delay in processing.

Type of Tax Document:	How to Obtain:
<b>Signed IRS Tax Return:</b> <ul style="list-style-type: none"> <li>Submit a copy of your 2021 IRS Tax Return with your <b>signature</b> on page 1 or 2 of your Form 1040 and include any applicable Schedules: 1, 2, and 3.</li> <li>If you filed electronically, print a copy of your IRS Tax Return and sign page 1 or 2 of your Form 1040 before submitting.</li> <li>Do not send your City or State Tax Return.</li> <li>Make a copy of your 2021 IRS Tax Return. Do <i>not</i> send us your only copy.</li> <li>Do not send your Tax Summary Page – Send a copy of your 2021 IRS Tax Return Form 1040.</li> </ul>	<b>Request Copy From Your Tax Preparer:</b> Contact your Tax Preparer and request a copy of your 2021 IRS Tax Return. <b>Online System Request:</b> If you used an online system such as TurboTax or TaxAct then you should be able to log in to the system and pull up a copy of your 2021 IRS Tax Return and print off a copy. <b>Don't Have a Copy or Unable to Locate a Copy?:</b> Request a copy of your 2021 IRS Tax Return Transcript from the IRS (directions below).
<b>IRS Tax Return Transcript:</b> <ul style="list-style-type: none"> <li>Includes most of the line items of a tax return as filed with the IRS. A tax return transcript does not reflect changes made to the account after the return is processed.</li> <li>In some instances, may substitute for your 2021 IRS Tax Return.</li> <li>Make sure to submit a copy of each page of your transcript as many transcripts are double-sided documents and we will need a copy of each page.</li> </ul>	<b>Telephone Request:</b> Call 1-800-908-9946 and make sure to request the “ <b>IRS Tax Return Transcript</b> ” for tax year ending 12/31/2021. <b>Online Request:</b> Go to <a href="http://www.irs.gov">www.irs.gov</a> and click “Get Your Tax Record” from the IRS homepage. Make sure to request the “ <b>IRS Tax Return Transcript</b> ” for tax year ending 12/31/2021. <b>Paper Request:</b> Use <a href="#">IRS Form 4506-T</a> by entering your information at the top of the page on lines 1-5. Then enter your tax form number on line 6 and then check box 6a for “ <b>IRS Tax Return Transcript</b> ”. Then enter the year or period requested (12/31/2021) on line 9. Then you must check the box above the signature to attest that you have the authority to sign and sign, date and add your phone number. Once completed mail or fax to the appropriate IRS contact information on page 2.
<b>Signed Amended IRS Tax Return:</b> <ul style="list-style-type: none"> <li>Submit a <b>signed</b> copy of your 2021 Amended IRS Tax Return Form 1040X.</li> <li>If you filed electronically, print a copy of your IRS Tax Return and sign page 1 or 2 before submitting.</li> </ul>	<b>Request Copy From Your Tax Preparer:</b> Contact your Tax Preparer and request a copy of your 2021 IRS Tax Return. <b>Online System Request:</b> If you used an online system such as TurboTax or TaxAct then you should be able to log in to the system and pull up a copy of your 2021 Amended IRS Tax Return and print off a copy. <b>Don't Have a Copy or Unable to Locate a Copy?:</b> Request a copy of your 2021 IRS Record of Account Transcript from the IRS (directions below).
<b>IRS Record of Account Transcript:</b> <ul style="list-style-type: none"> <li>Includes most of the line items of a tax return as filed with the IRS. As well as reflect changes made to the account after the original return is processed.</li> <li>In some instances, may substitute for your 2021 Amended IRS Tax Return Form 1040X.</li> <li>Make sure to submit a copy of each page of your transcript as many transcripts are double-sided documents and we will need a copy of each page.</li> </ul>	<b>Telephone Request:</b> Call 1-800-908-9946 and make sure to request the “ <b>IRS Record of Account Transcript</b> ” for tax year ending 12/31/2021. <b>Online Request:</b> Go to <a href="http://www.irs.gov">www.irs.gov</a> and click “Get Your Tax Record” from the IRS homepage. Make sure to request the “ <b>IRS Record of Account Transcript</b> ” for tax year ending 12/31/2021. <b>Paper Request:</b> Use <a href="#">IRS Form 4506-T</a> by entering your information at the top of the page on lines 1-5. Then enter your tax form number on line 6 and then check box 6c for “ <b>IRS Record of Account Transcript</b> ”. Then enter the year or period requested (12/31/2021) on line 9. Then you must check the box above the signature to attest that you have the authority to sign and sign, date and add your phone number. Once completed mail or fax to the appropriate IRS contact information on page 2.
<b>IRS Wage and Income Tax Transcript:</b> <ul style="list-style-type: none"> <li>Includes the data from any W-2, 1099 series, 1098 series, or 5498 series forms.</li> <li>May substitute for any 2021 W-2 Form, 1099 Form, 1098 Form, or 5498 Form.</li> </ul>	<b>Online Request:</b> Go to <a href="http://www.irs.gov">www.irs.gov</a> and click “Get Your Tax Record” from the IRS homepage. Make sure to request the “ <b>IRS Wage and Income Tax Transcript</b> ” for tax year ending 12/31/2021. <b>Paper Request:</b> Use <a href="#">IRS Form 4506-T</a> by entering your information at the top of the page on lines 1-5. Then check box 8 for “ <b>Form W-2, Form 1099 series, Form 1098 series, or Form 5498 series transcript</b> ”. Then enter the year or period requested (12/31/2021) on line 9. Then you must check the box above the signature to attest that you have the authority to sign and sign, date and add your phone number. Once completed mail or fax to the appropriate IRS contact information on page 2.
<b>IRS Verification of Non-Filing Letter:</b> <ul style="list-style-type: none"> <li>Proof from the IRS that you did not file a return for the tax year requested. IRS Verification of Non-Filing Letters for tax year 2021 must be obtained on or after October 1, 2022.</li> </ul>	<b>Online Request:</b> Go to <a href="http://www.irs.gov">www.irs.gov</a> and click “Get Your Tax Record” from the IRS homepage. Make sure to request the “ <b>IRS Verification of Non-Filing Letter</b> ” for tax year ending 12/31/2021. <b>Paper Request:</b> Use <a href="#">IRS Form 4506-T</a> by entering your information at the top of the page on lines 1-5. Then check box 7 for “ <b>IRS Verification of Non-Filing</b> ”. Then enter the year or period requested (12/31/2021) on line 9. Then you must check the box above the signature to attest that you have the authority to sign and sign, date and add your phone number. Once completed mail or fax to the appropriate IRS contact information on page 2.