

**Student Information** 

## 2023-2024 Tax Filing Status Verification - Student

OFFICE OF SCHOLARSHIPS AND FINANCIAL AID WARRINER HALL 202, MOUNT PLEASANT, MI 48859 PHONE: (989) 774-3674; FAX: (989) 774-3634 HTTPS://FINANCIALAIDPORTAL.APPS.CMICH.EDU VFSS 24

<u>Why have you received this form</u>? The tax filing status provided on your Free Application for Federal Student Aid (FAFSA) does not match your selected IRS tax filing status.

<u>When should this form be submitted</u>? Failure to complete and submit this form with all required documentation to the Office of Scholarships and Financial Aid within 21 business days may result in the cancellation of your federal financial aid.

Student Name (please print)	Spouse's Name (ple	se print) Ca	mpus ID Number
What was your 2021	Tax Status as of December 31, 202	L?	
	t to your and your spouse's (if applice located on the IRS website at https://example.com/html/html/html/html/html/html/html/htm	-	<u> </u>
2021 Tax Filing Status	Required Documentation		
I was married, but I was separated from my spouse for the last six months of the 2021 tax year.	IRS regulations allow an individual filing status of "Head of Household his/her spouse for the last six mont keeping up the home for the 2021 thouse for more than half the year.  ATTACH documentation of separand back copies of both parent	" when the person did not hs of the 2021 tax year, pa ax year, and had a qualify arate residences for <u>both</u> y	t live in the same home as id more than half the cost of ing person living in the ou and your spouse (e.g. front
	legal separation/divorce paper	s).	
I was married and not separated from my spouse.	IRS regulations require the filing state for individuals who are married at the your 2021 tax return to match your COMPLETE and ATTACH a signer 1040X that shows your corrected.	tus "Married Filing Jointly" ne conclusion of the 2021 marital status. d copy of your 2021 Amend	tax year. You need to amend
separated from my spouse.  Certification and Signature	IRS regulations require the filing state for individuals who are married at the your 2021 tax return to match your COMPLETE and ATTACH a signer 1040X that shows your corrected ature	tus "Married Filing Jointly" ne conclusion of the 2021 marital status. d copy of your 2021 Amend ed tax filing status.	tax year. You need to amend  ded IRS Tax Return Form
separated from my spouse.  Certification and Signature Recomplete to the best of my spouse.	IRS regulations require the filing state for individuals who are married at the your 2021 tax return to match your COMPLETE and ATTACH a signer 1040X that shows your corrected.	tus "Married Filing Jointly" he conclusion of the 2021 marital status.  d copy of your 2021 Amend ed tax filing status.  I have provided on this form	tax year. You need to amend  ded IRS Tax Return Form  n and on all documents is true and

## 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:** Signed IRS Tax Return: Request Copy From Your Tax Preparer: Contact your Tax Preparer and request a copy of • Submit a copy of your 2021 IRS Tax Return with your 2021 IRS Tax Return. your **signature** on page 1 or 2 of your Form 1040 Online System Request: If you used an online system such as TurboTax or TaxAct then you and include any applicable Schedules: 1, 2, and 3. should be able to log in to the system and pull up a copy of your 2021 IRS Tax Return and • If you filed electronically, print a copy of your IRS print off a copy. Tax Return and sign page 1 or 2 of your Form 1040 Don't Have a Copy or Unable to Locate a Copy?: Request a copy of your 2021 IRS Tax before submitting. Return Transcript from the IRS (directions below). • Do not send your City or State Tax Return. • Make a copy of your 2021 IRS Tax Return. Do not send us your only copy. • Do not send your Tax Summary Page – Send a copy of your 2021 IRS Tax Return Form 1040. **IRS Tax Return Transcript:** Telephone Request: Call 1-800-908-9946 and make sure to request the "IRS Tax Return • Includes most of the line items of a tax return as Transcript" for tax year ending 12/31/2021. filed with the IRS. A tax return transcript does Online Request: Go to www.IRS.gov and click "Get Your Tax Record" from the IRS homepage. not reflect changes made to the account after Make sure to request the "IRS Tax Return Transcript" for tax year ending 12/31/2021. the return is processed. Paper Request: Use IRS Form 4506-T by entering your information at the top of the page on In some instances, may substitute for your 2021 lines 1-5. Then enter your tax form number on line 6 and then check box 6a for "IRS Tax Return IRS Tax Return. Transcript". Then enter the year or period requested (12/31/2021) on line 9. Then you must • Make sure to submit a copy of each page of your check the box above the signature to attest that you have the authority to sign and sign, date transcript as many transcripts are double-sided and add your phone number. Once completed mail or fax to the appropriate IRS contact documents and we will need a copy of each information on page 2. page. Signed Amended IRS Tax Return: Request Copy From Your Tax Preparer: Contact your Tax Preparer and request a copy of • Submit a **signed** copy of your 2021 Amended your 2021 IRS Tax Return. Online System Request: If you used an online system such as TurboTax or TaxAct then you IRS Tax Return Form 1040X. • If you filed electronically, print a copy of your should be able to log in to the system and pull up a copy of your 2021 Amended IRS Tax IRS Tax Return and sign page 1 or 2 before Return and print off a copy. submitting. Don't Have a Copy or Unable to Locate a Copy?: Request a copy of your 2021 IRS Record of Account Transcript from the IRS (directions below). Telephone Request: Call 1-800-908-9946 and make sure to request the "IRS Record of **IRS Record of Account Transcript:** Account Transcript" for tax year ending 12/31/2021. • Includes most of the line items of a tax return as Online Request: Go to www.IRS.gov and click "Get Your Tax Record" from the IRS homepage. filed with the IRS. As well as reflect changes made to the account after the original return is Make sure to request the "IRS Record of Account Transcript" for tax year ending 12/31/2021. processed. <u>Paper Request</u>: Use IRS Form 4506-T by entering your information at the top of the page on • In some instances, may substitute for your 2021 lines 1-5. Then enter your tax form number on line 6 and then check box 6c for "IRS Record of Amended IRS Tax Return Form 1040X. Account Transcript". 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, • Make sure to submit a copy of each page of your date and add your phone number. Once completed mail or fax to the appropriate IRS contact transcript as many transcripts are double-sided documents and we will need a copy of each page. information on page 2. **IRS Wage and Income Tax Transcript:** Online Request: Go to www.IRS.gov and click "Get Your Tax Record" from the IRS homepage. • Includes the data from any W-2, 1099 series, Make sure to request the "IRS Wage and Income Tax Transcript" for tax year ending 1098 series, or 5498 series forms. 12/31/2021. Paper Request: Use IRS Form 4506-T by entering your information at the top of the page on May substitute for any 2021 W-2 Form, 1099 lines 1-5. Then check box 8 for "Form W-2, Form 1099 series, Form 1098 series, or Form 5498 Form, 1098 Form, or 5498 Form. series transcript". 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. **IRS Verification of Non-Filing Letter:** Online Request: Go to www.IRS.gov and click "Get Your Tax Record" from the IRS homepage. Make sure to request the "IRS Verification of Non-Filing Letter" for tax year ending • 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 Paper Request: Use IRS Form 4506-T by entering your information at the top of the page on

obtained on or after October 1, 2022. lines 1-5. Then check box 7 for "IRS Verification of Non-Filing". 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.