

2018-2019 Tax Document Guide

****IMPORTANT:** When submitting your federal tax return or transcript(s) to the Office of Scholarships and Financial Aid make sure you place the student's name and campus ID number on each page so we know that it is part of their financial aid record. Not doing so may cause a delay in processing due to the Internal Revenue Service's (IRS) new transcript format that partially masks personally identifiable information to better protect your data. Please use the student's campus ID number as the Customer File Number when requesting your transcript. 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.

Type of Tax Document:	How to Obtain:
<p>Signed Federal Tax Return:</p> <p>Submit a <u>signed</u> copy of your 2016 Federal Tax Return including any applicable Schedules: B, C, D, E, F, and K-1.</p> <p>If you filed electronically, print a copy of your Federal Tax Return and sign page 1 or 2 before submitting.</p> <p>Do not send your City or State Tax Return.</p> <p>Do not send your Tax Summary Page – Send a complete copy of your entire Federal Tax Return.</p>	<p>Request Copy From Your Tax Preparer: Contact your Tax Preparer and request a copy of your 2016 Federal Tax Return.</p> <p>Online System Request: 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 2016 Federal Tax Return and print off a copy.</p> <p>Don't Have a Copy or Unable to Locate a Copy?: Request a copy of your 2016 IRS Tax Return Transcript from the IRS (directions below).</p>
<p>IRS Tax Return Transcript:</p> <p>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.</p> <p>Takes place of 2016 Federal Tax Return.</p>	<p>Telephone Request: Call 1-800-908-9946 and make sure to request the "IRS Tax Return Transcript" for tax year ending 12/31/2016.</p> <p>Paper Request: Use IRS Form 4506-T 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 "IRS Tax Return Transcript". Then enter the year or period requested (12/31/2016) 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.</p> <p>Paper Request: Use IRS Form 4506-T 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 "IRS Tax Return Transcript". Then enter the year or period requested (12/31/2016) 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.</p>
<p>IRS Wage and Income Tax Transcript:</p> <p>Includes the data from any W-2, 1099 series, 1098 series, or 5498 series forms.</p> <p>Takes place of any 2016 W-2 Form, 1099 Form, 1098 Form, or 5498 Form.</p>	<p>Online Request: Go to www.irs.gov and click "Get My Tax Record" from the IRS homepage. Make sure to request the "IRS Wage and Income Tax Transcript" for tax year ending 12/31/2016.</p> <p>Paper Request: Use IRS Form 4506-T by entering your information at the top of the page on lines 1-5. Then check box 8 for "Form W-2, Form 1099 series, Form 1098 series, or Form 5498 series transcript". Then enter the year or period requested (12/31/2016) 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.</p>
<p>IRS Verification of Non-Filing Letter:</p> <p>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 2016 must be obtained on or after October 1, 2017.</p>	<p>Online Request: Go to www.irs.gov and click "Get My Tax Record" from the IRS homepage. Make sure to request the "IRS Verification of Non-Filing Letter" for tax year ending 12/31/2016.</p> <p>Paper Request: Use IRS Form 4506-T by entering your information at the top of the page on lines 1-5. Then check box 7 for "IRS Verification of Nonfiling". Then enter the year or period requested (12/31/2016) 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.</p>