

## Filing Status Worksheet (Instructions)

### Instructions for Tax-Filers

*To obtain an IRS tax return transcript, you can go to [www.irs.gov](http://www.irs.gov) and click on "Get My Tax Record" and then click on "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript." Or you can call 1-800-908-9946.*

*You may also request to receive your transcript by mail by clicking "Get Transcript by Mail" or by submitting the IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.*

*Please note that if you are eligible to use the IRS Data Retrieval Tool to link your taxes to the FAFSA, that this option may limit any current and future request for verification and may result in a quicker resolution of your verification status.*

### Instructions for Non Tax-Filers

*To obtain confirmation of non-filing from the IRS, you can follow the same steps listed above. If the IRS has no record of any 2018 tax return being filed under your Social Security Number, then instead of a tax transcript, you will receive a letter confirming your non-filing.*

*Please note that if you are married, confirmation of filing will be needed for both you and your spouse. If one of you filed and the other did not, we will need a transcript for one and a confirmation of non-filing for the other. If both of you did not file, we will need a confirmation of non-filing for both.*

# 2020-2021 Dependent Filing Status Worksheet

PLEASE CHECK ONE FOR STUDENT & ONE FOR PARENT AND FOLLOW ALL INSTRUCTIONS

Student Last \_\_\_\_\_ Student First \_\_\_\_\_ Middle Initial \_\_\_\_\_ Student SSN \_\_\_\_\_

### 2018 Student Non-Filers

- I did not (and was not required to) file taxes in 2018 – I did not have any income earned from work in 2018.
- I did not (and was not required to) file taxes in 2018; however I was employed. Please complete information below and provide copies of all 2018 IRS W-2 forms issued. List all employers, even if the employer did not issue a 2018 W-2 form. If you do not have W-2's, submit a signed/dated statement explaining why the IRS Form W-2 is unavailable

Employer's Name	2018 Amount Earned		IRS W-2 Provided?
Suzy's Auto Body Shop (example)	\$2,000.00		Yes

### 2018 Student Federal Income Tax Filers

- I filed taxes in 2018 (**and**)
- I **have used** the IRS Data Retrieval Tool in FAFSA on the Web to transfer my 2018 IRS income information into my FAFSA (either on the initial FAFSA or a correction to the FAFSA)
  - I **am unable to use** the IRS Data Retrieval Tool, and I will submit copies of my 2018 Federal Tax return Transcript (not a copy of the tax return form) to my school.

### 2018 Parent Non-Filers

- My parents did not file 2018 Federal Taxes (nor were they required to do so) – Neither had any income from work in 2018 **(in addition to checking this box, your parents must submit confirmation of non-filing for the 2018 tax year from the IRS or a relevant tax authority)**
- My parents did not file 2018 Federal Taxes (nor were they required to do so); however, one (or both) was employed in 2018. Please complete information below and provide copies of all 2018 IRS W-2 forms issued. List all employers, even if the employer did not issue a 2018 IRS W-2 form. If you do not have W-2's, submit a signed/dated statement explaining why the IRS Form W-2 is unavailable **(in addition to checking this box, your parents must submit confirmation of non-filing for the 2018 tax year from the IRS or a relevant tax authority)**

Employer's Name	2018 Amount Earned	Employee's name (mother/father)	IRS W-2 Provided?
Suzy's Auto Body Shop (example)	\$2,000.00	Mother	Yes

### 2018 Parent Federal Income Tax Filers

- My parent(s) filed taxes in 2018 (**and**)
- My parent(s) **has used** the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2018 IRS income information into my FAFSA (either on the initial FAFSA or a correction to the FAFSA)
  - My parent(s) **is unable to use** the IRS Data Retrieval Tool, and I will submit copies of his or her 2018 Federal Tax return Transcript(s) (not a copy of the tax return form) to my school.
- My parents filed separately in 2018 and I will be providing 2018 Federal Tax Return Transcripts for each

### Special Circumstance:

- Check here if for the 2018 tax year, you- and/or your parents-were granted a filing extension, filed an amended tax form, were a victim of identity theft, or if you filed a non-IRS Income tax return. **(If you check this box, we must have a completed "Verification of Unusual Tax Circumstances" form)**

**WARNING: If you purposefully give false or misleading information you may be fined, be sentenced to jail, or both.**

### CERTIFICATION & SIGNATURE

Each person signing below certifies that all of the information reported is complete and correct

\_\_\_\_\_  
Student Signature (Required)

\_\_\_\_\_  
Date (Required MM/DD/YYYY)

\_\_\_\_\_  
Parent Signature (Required)

\_\_\_\_\_  
Date (Required MM/DD/YYYY)