

**2018 TAX FILING RESOLUTION – EXEMPTIONS**

**Student's Name:** \_\_\_\_\_ **Phone:** \_\_\_\_\_

**Reason for this form:** After reviewing your financial aid application, the Financial Aid Office has found that you claimed an exemption for yourself, and your parent(s) also claimed you as a dependent on their 2018 tax return. You cannot take an exemption for yourself if another taxpayer is entitled to and has claimed you as a dependent. For more information, refer to *IRS Publication 17 - 2018 Tax Guide for Individuals, Part One, Chapter 3* available online at [irs.gov/pub/irs-prior/p17--2018](https://irs.gov/pub/irs-prior/p17--2018).

**Action Required:**

1. Before we can process your financial aid, you (the dependent student) must **amend** your 2018 tax return.
2. Submit the following to our office:
  - a signed copy of **Form 1040X - Amended U.S. Individual Income Tax Return;**  
**AND**
  - a **2018 Tax Return Transcript** or signed copy of your **2018 tax return and applicable schedule(s)**.  
*(Check "Your Eligibility Requirements" in Banner. Submit if status for "IRS tax return data (student)" is anything other than "Submitted to FAO" or "Reviewed by FAO.")*  
**AND**
  - a signed copy of this form.

**Certification**

*I certify that all information provided in this document is true, complete and accurate. I understand that if I purposely give false or misleading information, I may be fined, sentenced to jail or both.*

**Student signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Parent signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_  
*(Parent signature required if student is dependent for federal student aid purposes.)*

**See page 2 for instructions to request a Tax Return Transcript**

# Instructions for Providing 2018 Tax Filing Information for Financial Aid at JCC



## Ways to Get Transcripts

To obtain tax transcripts, register to use **Get Transcript Online** at [irs.gov](https://www.irs.gov) to view, print or download all transcript types listed below. If you are unable to register or prefer not to use *Get Transcript Online*, you can order a tax return transcript using *Get Transcript by Mail* at [irs.gov](https://www.irs.gov) or by calling 800-908-9946. Allow 5 to 10 calendar days for delivery. You can also request any transcript type listed below by faxing/mailling Form 4506-T, Request for Transcript of Tax Return as instructed on the form. Form 4506-T is available at [irs.gov](https://www.irs.gov).

## Transcript Types

The IRS offers the following transcript types at no charge:

- **Tax Return Transcript:** This is the transcript **required by the financial aid office for tax filer verification**.
- **Verification of Non-Filing Letter** is required of **parents and independent students** (students who did not use parent information on the FAFSA) **who have reported they did not file a 2018 tax return**. This letter is available using *Get Transcript Online* or Form 4506-T.
- **Wage and Income Transcript** shows data from the W-2, 1099, 1098 and Form 5498, IRA Contribution Information. This transcript **can be submitted instead of W2s** and is available using *Get Transcript Online* or Form 4506-T.
- **Record of Account Transcript** combines tax return and tax account transcripts into one complete transcript. This transcript is available using *Get Transcript Online* or Form 4506-T and **is acceptable** for financial aid purposes.
- **Tax Account Transcript** is **not** the same as a Tax Return Transcript. It **does not** satisfy the financial aid requirement.

**Note:** When using *Get Transcript by Mail* or phone, the primary taxpayer on a joint tax return must make the request. The secondary spouse will use *Get Transcript Online* or Form 4506-T to request this transcript.

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## INSTRUCTIONS FOR SPECIAL SITUATIONS

### Amended Returns

If you filed an amended tax return, you must submit a 2018 IRS Tax Return Transcript or signed copy of your 2018 tax return with applicable schedule(s) **AND** a signed copy of your Form 1040-X, "Amended U.S. Individual Income Tax Return."

### Victim of IRS Identity Theft

A victim of IRS identity theft who is not able to obtain a 2018 IRS Tax Return Transcript must contact the IRS at 1-800-908-4490 to receive a printout of the tax return transcript by mail. Submit this printout along with a signed statement indicating that you were a victim of IRS tax-related Identity theft and that the IRS has been made aware of the tax-related identity theft to the financial aid office.

### Non-IRS Income Tax Returns

An individual who filed a 2018 income tax return with Guam, Northern Mariana Islands, Puerto Rico, or the U.S. Virgin Islands may provide a signed copy of the 2018 income tax return. An individual who filed a 2018 income tax return with American Samoa must provide a tax return transcript from the taxing authority. An individual who filed a 2018 income tax return with a foreign tax authority but provide a tax return transcript from the taxing authority unless the taxing authority charges a fee to obtain the transcript. In that case, provide documentation that there is a fee along with a signed copy of the 2018 income tax return.