

Enter your JCC ID: J00 _____
FA 2122 IRSSP



IRS INCOME-TAX VERIFICATION – SPOUSE

STUDENT'S SPOUSE TAX FILER – do not submit this form:

If student's spouse **did file, will file, or was required to file** a 2019 federal tax return, do **not** submit this form to the financial aid office. See **Tax Filer Instructions** on page 2.

STUDENT'S SPOUSE NON-TAX FILER:

Complete/submit this form if spouse **did not file** and was **not required to file** a 2019 income tax return.

Student's name: _____ Phone: _____

Spouse's name: _____ Last 4 digits of spouse's SSN: _____

Spouse's tax filing status:

Check here to certify spouse named above **did not file** and was **not required** to file a 2019 federal tax return.

Check **one** box below to indicate the status of spouse's Verification of Non-filing letter (VONF) from the IRS:

VONF for tax year 2019 is being submitted with this form.

VONF for tax year 2019 request has been sent to IRS, but not received, and will be submitted on receipt.

Spouse's Employment status: *Check only one box indicating status that applies to student non-tax filer.*

Spouse was not employed, and had no income earned from work in 2019.

Spouse **was employed** in 2019 but **was not required to file** a federal tax return, and has listed below the names of **all** employers, the amount earned from each employer in 2019, and whether an IRS W2 form or equivalent document is provided. List every employer even if the employer did not issue a W2 form. Provide copies of all 2019 W2 forms issued to you by your employer(s).

Name of wage earner	Name of Employer	W2 or equivalent document provided?	Annual Amount Earned in 2019
(Example) Mary Doe	ABC Auto body Shop	YES	\$4500.00

Check this box and attach separate page with student's name and JCC ID number at the top if more space is needed.

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

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

Student signature: _____ Date: _____

Spouse signature: _____ Date: _____

JCC Financial Aid Office | PO Box 20 | Jamestown, NY 14702-0020
Jamestown 716.338.1009 | 1.800.388.8557 ext. 1009 | Olean 716.376.7512 | 1.800.388.8557 ext. 7512 | FAX 716.338.1459

TAX FILER INSTRUCTIONS

If your spouse filed a 2019 federal tax return, **do not submit page 1** to the financial aid office. Instead, provide tax data by one of the following methods:

- Submit a copy of your spouse's 2019 Tax Return Transcript available from the IRS *or*,
- Submit a copy of your spouse's 2019 federal tax return with applicable schedule(s), signed by your spouse.

If you and your spouse did not file Married Filing Jointly in 2019 you are not able to use the IRS Data Retrieval Tool on the FAFSA and can only use one of the methods above. See instructions below for obtaining transcripts from the IRS.

INSTRUCTIONS FOR OBTAINING TAX TRANSCRIPTS FROM THE IRS

The IRS offers the following **transcript types** at no charge:

- **Verification of Non-Filing Letter** is required if your spouse did not file and was not required to file a 2019 federal tax return. This is available using Get Transcript Online or Form 4506-T.
- **Tax Return Transcript:** This is the tax transcript required by the financial aid office for tax filer verification. A tax **account** transcript is not the same as a tax **return** transcript and does not satisfy the financial aid requirement.
- **Wage and Income Transcript** shows data from the W2, 1099, 1098 and Form 5498, IRA Contribution Information. This transcript can be submitted in lieu of W2s and is available using Get Transcript Online or Form 4506-T.
- **Record of Account Transcript** is not to be confused with the tax account transcript, which is not acceptable for verification purposes. This transcript combines tax return and tax account transcripts into one complete transcript, and is available using Get Transcript Online or Form 4506-T. This transcript is acceptable for financial aid purposes.

Instructions: To obtain tax transcripts, register to use *Get Transcript Online* at **irs.gov** to view, print or download all transcript types listed below. If your spouse is unable to register or prefers not to use *Get Transcript Online*, you can order a tax return transcript using *Get Transcript by Mail* at **irs.gov** or by calling 800-908-9946. Allow 5 to 10 days for delivery. Your spouse can also request any transcript type listed below by faxing or mailing *Form 4506-T Request for Transcript of Tax Return* as instructed on the form. Form 4506-T is available online at **irs.gov**.

INSTRUCTIONS FOR SPECIAL SITUATIONS

Amended Returns: Tax filers who filed a 2019 amended tax return must submit a signed copy of Form 1040-X "Amended U.S. Individual Income Tax Return **AND** a signed copy of the 2019 federal tax return with applicable schedules or a Tax Return Transcript.

Marital Status has changed since Tax Year 2019:

- If your marital status has changed to married since the 2019 tax filing year, a signed copy of the 2019 federal tax return with applicable schedule(s) or a 2019 Tax Return Transcript **AND** copies of all 2019 W2s, must be submitted for both you and your spouse even though you were not married in 2019. A Verification of Non-Filing Letter, W2s (if employed), and page 1 of this form must be submitted for a spouse who did not file a 2019 federal return.
- If your marital status has changed to separated or divorced since the 2019 tax filing year and the 2019 return was filed as Married Filing Jointly, you must submit a 2019 tax return transcript or signed federal tax return with applicable schedules **AND** all W2 forms for both taxpayers on the return so income can be separated appropriately.

Victim of IRS Identity Theft: A victim of IRS identity theft who is not able to obtain a 2019 IRS Tax Return Transcript will need to 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 2019 non-IRS income tax return with a foreign tax authority must provide a signed copy of the 2019 tax return from the relevant tax authority.