

Providing 2018 Tax Information to JCC Financial Aid Office for Verification

Tax Filers (if you filed a 2018 federal tax return)

1. The preferred method of providing tax documentation for students and parents that filed 2018 federal income tax returns is the IRS Data Retrieval (IRS DRT), a tool built into the FAFSA that allows you to pull your federal tax information from the Internal Revenue Service's system directly into your FAFSA.
2. Tax filers that are unable or choose not to use the IRS Data Retrieval Tool may submit a 2018 tax return transcript (not a tax account transcript) or a signed copy of their 2018 federal 1040 tax return with applicable schedule(s).

Non Tax Filers (if you did NOT file a 2018 federal tax return)

1. Independent students (and spouse if married) and parents of dependent students who did not file a 2018 federal tax return must submit:
 - a. A **Verification of Non-Filing Letter (VONF)** from the IRS (see below under Transcript Types) **and**
 - b. The appropriate **IRS Income-Tax Verification** form from Your Eligibility Requirements in your Banner account, online at banner.sunyjcc.edu. JCC verification forms are also available online at sunyjcc.edu/financial-aid/forms.
2. Dependent students do not need to provide VONF from the IRS, but are required to complete and submit the **IRS Income-Tax Verification-Student** form.

Ways to Get Transcripts from the IRS

Register to use *Get Transcript Online* at 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 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 or mailing Form 4506-T, *Request for Transcript of Tax Return* as instructed on the form. Form 4506-T is available at irs.gov. **Note:** When using *Get Transcript by Mail* or ordering by 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.

Transcript Types

The IRS offers the following transcript types at no charge:

- **Verification of Non-Filing Letter:** This is required of independent students (students who did not use parent information on the FAFSA) and parents of dependent students who have reported they did not file a 2018 tax return. This letter is available using *Get Transcript Online* or Form 4506-T (available from the IRS).
- **Tax Return Transcript:** This is the transcript **used by the financial aid office** for verification purposes.
- **Tax Account Transcript** is not the same as a Tax Return Transcript. It **does not** satisfy the financial aid requirement.
- **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.
- **Wage and Income Transcript** shows data from the W-2, 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.

INSTRUCTIONS FOR SPECIAL SITUATIONS

Amended Returns – Tax filers who filed an amended tax return must submit a 2018 IRS Tax Return Transcript or signed copy of the 2018 IRS Tax Return **AND** a signed copy of Form 1040-X, "Amended U.S. Individual Income Tax Return."

Marital Status has changed since Tax Year 2018 –

- If student or parent marital status has **changed to married** since the 2018 tax filing year, a signed copy of the 2018 tax return or a Tax Return Transcript and copies of all 2018 W2s must be submitted for each tax filer. If a parent (or spouse, if married) did not file a 2018 return, a Verification of Non-filing Letter and W2's (if parent/spouse worked) must be submitted along with the JCC **IRSP (or IRSP2) Income-Tax Verification** for the parent/stepparent who did not file taxes.
- If parent marital status has changed to **separated or divorced** since the 2018 tax filing year and the 2018 tax return was filed as Married Filing Jointly, all W2 forms for both taxpayers on the 2018 joint tax return with applicable schedule(s) must be provided to the financial aid office so that the income can be separated appropriately.

Victim of IRS Identity Theft: A victim of IRS identity theft who is not able to obtain a 2018 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 2018 non-IRS income tax return with a foreign tax authority must provide a signed copy of the 2018 tax return from the relevant tax authority.