



Return to: Office of Financial Aid
P.O. Box 6804 GH-146 Fullerton,
CA 92834-6804

Enter Student's
CWID Here:

STUDENT (AND SPOUSE) 2020 TAX FILING STATEMENT (2022-2023)

To verify student (and student's spouse, if married) 2020 income and wages information, you must provide the information below.

Instructions for completing this form:

Complete section A whether or not you, the student (and your spouse), have already completed your **2020** U.S. Federal Tax Return

Do NOT email any IRS Tax Return Transcripts or other IRS documents to our office to protect your privacy.

Incomplete documents will not be returned. They will be disposed of in a secure manner, per university policy. This will delay processing.

Section A: Student Income Information

Did you, the student, file a 2020 income tax return with the IRS? **(if married, include spouse)**

Yes (select one option from the column below)

No (select one from the column below)

Student Tax Filers

I am unable to or choose not to use the IRS DRT

- Submit your 2020 Tax Return Transcript or a signed copy of the 2020 1040 Tax Returns along with **schedules 1,2,3 if applicable**
- Obtain your transcript from the IRS website <http://www.irs.gov> and click on "Get Transcript of Your Tax Records" OR by calling (800)908-9946 to request an IRS Tax Return Transcript for the 2020 year

My filing status was Married Filing Jointly; however, I have since separated. Date of separation: _____

- Submit a SIGNED copy of the 2020 Tax Return Transcript or 2020 1040 Tax Returns along with **schedules 1,2,3 if applicable**
- AND copies of all W2s, as they are required to determine your portion of the income

I/we have filed a Tax Extension

- If tax extension is beyond the 6 month **October 15, 2020 deadline:**
 - Submit form 4868, unexpired IRS approval of extensions beyond the automatic 6-month extension
 - All W2s, a signed statement with estimated 2020 income and/or business related income amount(s) (if applicable), a signed copy of your 2019 federal tax return form (1040, 1040A or 1040EZ), and provide confirmation of non-filing from the IRS through form 4506-T (box 7) dated on or after October 1, 2020

I/we have filed a 2020 Foreign Tax Return

- Submit a signed and translated copy of your foreign tax return, which shows the 2020 Adjusted Gross Income (AGI) and taxes paid.

Student Nontax Filers

I was not employed and had no income earned from work in 2020.

- Independent students as defined on the FAFSA **MUST** provide confirmation of non-filing from the IRS through form 4506-T (box 7), or online through IRS dated on or after October 1, 2020, or written statement of non-filing
- Dependent students as defined on the FAFSA are **NOT** required to provide confirmation of non-filing.

I was employed in 2020 but not required to file.

- Submit a copy of all your 2020 Form W-2(s) from your employer or your 2020 IRS Wage and Income tax Transcript. OR 1099s.
- Independent students as defined on the FAFSA **MUST** provide confirmation of non-filing from the IRS through form 4506-T (box 7), or online through IRS dated on or after October 1, 2020, or written statement of non-filing
- List the names of all your 2020 employer(s) and the amount earned from each employer in 2020

Employer's Name	2020 Amount Earned
Example: Suzy's Auto Body Shop	Example: \$2,000.00

CERTIFICATION:

By signing this form, I certify that all of the information reported on this form and any attachments hereto is true, complete and accurate. I agree to provide additional proof of the information reported, if requested to do so. I also certify that I have read the terms and conditions section of the CSU Fullerton, Financial Aid website (<http://www.fullerton.edu/financialaid/info/Terms.php>) *Signature is required.

*Student Signature: _____

Date _____

Print Student's Name: _____

CWID _____

* **Warning:** If you give false or misleading information on documents submitted to the Office of Financial Aid, you may be fined, be sentenced to jail or both.

USING THE IRS DATA RETRIEVAL TOOL (DRT)

The IRS Data Retrieval Tool can be used when completing the FAFSA to directly pull parental tax information from the IRS into the FAFSA. This will expedite the application process. In most cases, no further documentation is needed by our office to verify income if the transfer of data using the IRS DRT is successful. Below are steps on how to utilize IRS DRT.

1. Log in to your current FAFSA or start a new FAFSA at www.fafsa.gov using your **FSA ID**.
2. Skip to the "Financial Information" section and, if applicable, update the following:
 - a. Whether or not you have filed an IRS income tax return and,
 - b. Your tax filing status.
3. After updating the above information, you will be asked additional questions to screen your DRT eligibility.
4. You will see the "Link to IRS" button if you are eligible to use the IRS DRT, if so, click on the button and log in with the IRS to retrieve your tax return information.
5. Review your tax return information, and see the tax data that will be transferred into your FAFSA.
6. Check the "Transfer My Tax Information into the FAFSA" box, and click the "Transfer Now" button.
7. Review your federal tax return information that has been transferred into the data fields on your FAFSA and submit your correction.

If you successfully transferred your tax information and submitted your correction, you will no longer have to submit tax return transcripts. Please allow **two business weeks** for our office to download these corrections. Shortly after we will remove the Student Tax Filing Statement and/or Parent Tax Filing Statement from your To-Do List.

Please note: Not everyone can use the IRS DRT function. Please visit <https://fafsa.ed.gov/help/irshlp10.htm> to determine if you can use DRT. If you cannot use the IRS DRT you may have to request **tax return transcripts**. Please visit www.irs.gov/transcript to view transcript ordering options or call 1-800-908-9946 to request return transcripts via phone.

HOW TO REQUEST AN IRS TAX TRANSCRIPT (INCLUDING VERIFICATION OF NON-FILING)

The IRS has now made downloading an electronic copy of your tax transcript an option for those individuals with a valid Social Security Number (SSN). You can begin this process by navigating to <http://www.irs.gov/transcript>. The website will require authentication of the primary tax filer's identity. You will be asked to provide the following information that should correspond with what the IRS has on file for the primary tax filer: SSN, date of birth, street address, and zip code. Once the authentication is complete, take the following steps:

- Choose the "Get Transcript ONLINE" option. You must sign in or sign up to create an account.
- Select the reason you are requesting a transcript as "Higher Education/Student Aid".
- In the "Return Transcript" Box, choose the transcript for the appropriate tax year. Your IRS Tax Return Transcript should then open on-screen as a pdf document.
- Print the transcript and write the student's name and Cal State Fullerton CWID at the top of page, attach all printed pages of the Tax return Transcript to the Tax Filing Statement form, and return them to the Office of Financial Aid (GH 146).
- If you are requesting "Verification of Non-filing Letter", choose that option and appropriate tax year.

If you are a taxpayer but unable to access your Tax Return Transcript online, you will have to order a paper tax transcript to be sent to you via regular post. You can do so by:

- Navigating to the IRS website <http://www.irs.gov> and clicking on "Get Transcript of Your Tax Records", OR
- Calling 1-800-908-9946 to request an IRS Tax Return Transcript for the appropriate year.

PLEASE NOTE: The above options can also be utilized by taxpayers with a valid SSN if, for whatever reason, the downloadable tax transcript cannot be obtained. Turnaround time for the above options can take up to 10 business days depending on IRS peak processing times. Additionally, tax transcripts requested online or by telephone **CANNOT** be sent directly to a third party by the IRS.

WHO IS REQUIRED TO FILE A U.S. FEDERAL INCOME TAX RETURN?

You must file a U.S. Federal Income Tax Return, AND follow the instructions in Section A of the previous page, if your gross income was at least:

- \$12,400 if parents claimed you as a dependent
- \$12,400 if single
- \$18,650 if head of household
- \$24,800 if married, filing jointly
- \$5.00 if married, filing separately
- Or, you had net earnings from self-employment of at least \$400.00

If an individual did not file an IRS income tax return, regardless if he/she earned any income from work, MUST provide confirmation of non-filing dated on or after October 1, 2020 from the IRS or other relevant taxing authority and submit it with this form to the Office of Financial Aid. Ways to request letter from the IRS include:

- Completing the 4506-T form (box 7) on this link <https://www.irs.gov/pub/irs-pdf/f4506t.pdf> and submit to the IRS
- Requesting "Verification of Non-Filing" form online through IRS website <http://www.irs.gov/transcript> (see "How to Request an IRS Tax Transcript" section above).