



CALIFORNIA STATE UNIVERSITY

**FULLERTON**

Return to: Office of Financial Aid

P.O. Box 6804 GH-146

Fullerton, CA 92834-6804

**Enter Student's  
CWID Here:**

**CA Dream Act Application**

**STUDENT (AND SPOUSE) 2021 TAX FILING STATEMENT (2023-2024)**

To verify student's (and spouse's if married) 2021 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 **2021** 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 2021 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 have filed a 2021 Tax Return**

- Submit your 2021 IRS Tax Return Transcript or 2021 1040 Tax Returns along with **all schedules if applicable**
- 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 2021 year.

**My filing status was Married Filing Jointly; however I have since separated.** Date of Separation \_\_\_\_\_

- Submit a SIGNED copy of the 2021 IRS Tax Return Transcript or 2021 1040 Tax Returns along with **all schedules if applicable**
- AND copies of all W2s, as they are required to determine your portion of earned income.

**I/we have filed a Tax Extension.**

- If tax extension is beyond the 6 month **October 15, 2021 deadline:**

- Submit form 4868, unexpired IRS approval of extensions beyond the automatic 6-month extension
- All 2021 W2s, a signed statement with estimated 2021 income and/or business income amount(s) (if applicable), a signed copy of 2020 federal tax return form (1040, 1040A, or 1040EZ), and provide confirmation of non-filing from the IRS through form 4506-T (box 7), or other relevant taxing authority dated on or after October 1, 2021.

**I/we have filed a 2021 Foreign Tax Return.**

- Submit a signed and translated copy of your foreign tax return, which shows the 2021 Adjusted Gross Income (AGI) and Taxes Paid.

**Student Nontax Filers**

**I was not employed and had no income earned from work in 2021 .**

- Independent students as defined on the CDAA **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, 2021, or written statement of non-filing
- Dependent students as defined on the CDAA are **NOT** required to provide confirmation of non-filing- *However, please **INCLUDE** a signed statement that you did not earn income in 2021 and did not file taxes.*

**I was employed in 2021 but not required to file.**

- Submit a copy of all your 2021 Form W-2(s) from your employer or your 2021 IRS Wage and Income tax Transcript. OR 1099s
- Independent students as defined on the CDAA **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, 2021, or written statement of non-filing
- List the names of all your 2021 employer(s) and the amount earned from each employer in 2021

Employer's Name	2021 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.

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## HOW TO REQUEST AN IRS TAX TRANSCRIPT

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 (UH 146).

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.

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## 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 earnings from self-employment of any amount 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 from the IRS through form 4506-T (box 7) or other relevant taxing authority dated on or after October 1, 2021:

- Complete the 4506-T form (box 7) on this link <https://www.irs.gov/pub/irs-pdf/f4506t.pdf> and submit to the IRS
- Submit the non-filing letter from IRS along with this form to the school
- OR confirmation from other relevant taxing authority