

## Filing Status Worksheet (Instructions)

### Instructions for Tax-Filers

*To obtain an IRS tax return transcript, you can go to [www.irs.gov](http://www.irs.gov) and click on "Get My Tax Record" and then click on "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript." Or you can call 1-800-908-9946.*

*You may also request to receive your transcript by mail by clicking "Get Transcript by Mail" or by submitting the IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.*

*Please note that if you are eligible to use the IRS Data Retrieval Tool to link your taxes to the FAFSA, that this option may limit any current and future request for verification and may result in a quicker resolution of your verification status.*

### Instructions for Non Tax-Filers

*To obtain confirmation of non-filing from the IRS, you can follow the same steps listed above. If the IRS has no record of any 2017 tax return being filed under your Social Security Number, then instead of a tax transcript, you will receive a letter confirming your non-filing.*

*Please note that if you are married, confirmation of filing will be needed for both you and your spouse. If one of you filed and the other did not, we will need a transcript for one and a confirmation of non-filing for the other. If both of you did not file, we will need a confirmation of non-filing for both.*

# 2019-2020 Dependent Filing Status Worksheet

PLEASE CHECK ONE FOR STUDENT & ONE FOR PARENT AND FOLLOW ALL INSTRUCTIONS

Student Last                                  Student First                                  Middle Initial                                  Student SSN

### 2017 Student Non-Filers

- I did not (and was not required to) file taxes in 2017 – I did not have any income earned from work in 2017.
- I did not (and was not required to) file taxes in 2017; however I was employed. Please complete information below and provide copies of all 2017 IRS W-2 forms issued. List all employers, even if the employer did not issue a 2017 W-2 form. If you do not have W-2's, submit a signed/dated statement explaining why the IRS Form W-2 is unavailable

Employer's Name	2017 Amount Earned		IRS W-2 Provided?
Suzy's Auto Body Shop (example)	\$2,000.00		Yes

### 2017 Student Federal Income Tax Filers

- I filed taxes in 2017 (**and**)
- I **have used** the IRS Data Retrieval Tool in FAFSA on the Web to transfer my 2017 IRS income information into my FAFSA (either on the initial FAFSA or a correction to the FAFSA)
  - I **am unable to use** the IRS Data Retrieval Tool, and I will submit copies of my 2017 Federal Tax return Transcript (*not a copy of the tax return form*) to my school.

### 2017 Parent Non-Filers

- My parents did not file 2017 Federal Taxes (nor were they required to do so) – Neither had any income from work in 2017 (**in addition to checking this box, your parents must submit confirmation of non-filing for the 2017 tax year from the IRS or a relevant tax authority**)
- My parents did not file 2017 Federal Taxes (nor were they required to do so); however, one (or both) was employed in 2017. Please complete information below and provide copies of all 2017 IRS W-2 forms issued. List all employers, even if the employer did not issue a 2017 IRS W-2 form. If you do not have W-2's, submit a signed/dated statement explaining why the IRS Form W-2 is unavailable (**in addition to checking this box, your parents must submit confirmation of non-filing for the 2017 tax year from the IRS or a relevant tax authority**)

Employer's Name	2017 Amount Earned	Employee's name (mother/father)	IRS W-2 Provided?
Suzy's Auto Body Shop (example)	\$2,000.00	Mother	Yes

### 2017 Parent Federal Income Tax Filers

- My parent(s) filed taxes in 2017 (**and**)
- My parent(s) **has used** the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2017 IRS income information into my FAFSA (either on the initial FAFSA or a correction to the FAFSA)
  - My parent(s) **is unable to use** the IRS Data Retrieval Tool, and I will submit copies of his or her 2017 Federal Tax return Transcript(s) (*not a copy of the tax return form*) to my school.
- My parents filed separately in 2017 and I will be providing 2017 Federal Tax Return Transcripts for each

### Special Circumstance:

- Check here if for the 2017 tax year, you- and/or your parents-were granted a filing extension, filed an amended tax form, were a victim of identity theft, or if you filed a non-IRS Income tax return. (**If you check this box, we must have a completed "Verification of Unusual Tax Circumstances" form**)

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

### CERTIFICATION & SIGNATURE

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

\_\_\_\_\_  
Student Signature (Required)

\_\_\_\_\_  
Date (Required MM/DD/YYYY)

\_\_\_\_\_  
Parent Signature (Required)

\_\_\_\_\_  
Date (Required MM/DD/YYYY)