



Office of Student Aid
314 Shields Building
University Park, PA 16802

Phone: (814) 865-6301
Fax: (814) 863-0322
Studentaid.psu.edu

Parent(s) 2017 Federal Tax information

Student Name: _____ PSU ID: _____

Please submit the correct form(s) as indicated below.

As of the date you submitted the 2019–20 FAFSA, if:

- Your parent is single, divorced, separated, or widowed and filed an individual federal tax return, submit the tax information for your one parent.
- Your parents were married and filed a joint federal tax return, submit the tax information for both of your parents.
- You parents were married and filed separate federal tax returns, submit tax information for BOTH your parent and their current spouse.
- Your legal parents (biological, adoptive, or as determined by the state [ex. if parent is listed on your birth certificate] were unmarried and living together, submit federal tax information for BOTH of them.
- Your parent was separated, divorced, or widowed and filed a joint federal tax return, write each parent's portion of income on every line of the Tax Return Transcript and submit copies of your parent's 2017 federal W-2s. If your parents had no W-2 earnings in 2017, complete the [Parent Earnings from Work form](#).

Acceptable Methods to Provide your Tax Information

1. **IRS Data Retrieval Tool** (Recommended Method) - Go to [FAFSA](#), and log in under “Returning User” Once in the FAFSA, select the “Correct info” link, then the “Financial Information” tab. Continue until you click “Submit.”

2. **IRS Tax Return Transcript:**

To get a 2017 Tax Return Transcript go to irs.gov/Individuals/Get-Transcript or call 1-800-908-9946. Please do not have your tax transcript sent directly to the school. When you receive the tax transcript from the IRS please put the student's 9 digit ID number on the top of every page and submit it to our office.

3. **Signed Tax Return(s)**

Provide a legible, signed copy of page one and two of their 2017 IRS Form 1040 and the applicable schedules that were filed with the IRS.

4. **Income for Non-IRS Tax Filers**

To verify income information, tax filers who filed a tax return with one of the following must submit a copy of their tax return or tax transcript if a transcript is available at no charge from a taxing authority:

- In a U.S. territory (Guam, American Samoa, the U.S. Virgin Islands)
- In a U.S. commonwealth (Puerto Rico, the Northern Mariana Islands)

Amended Return(s):

If you filed an amended return and you already submitted the DRT on your 2019-20 FAFSA, please provide a SIGNED copy pages one and two of the IRS 2017 Form 1040X.

If you filed an amended return and you did NOT submit the DRT on your 2019-20 FAFSA, complete one of the following options:

- Make a correction to your 2019-20 FAFSA and submit the DRT (both the student and parent must sign the FAFSA with the electronic signatures) AND you must submit a SIGNED copy pages one and two of the IRS 2017 Form 1040X.
- Submit a Federal Tax Return Transcript (see instructions above) AND a SIGNED copy pages one and two of the IRS 2017 Form 1040X.

If you have Rollover Income: If all or part of the untaxed portion of a 2017 IRA or pension distribution was rolled over into another account, submit either a copy of IRS Form 1099-R with code G or H or a "Rollover Statement" from the bank or organization that completed the rollover AND a signed statement from the student and parent stating what the rollover amount is.