



Student/Spouse 2016 Federal Tax information for Tax-Filers

Student Name: _____ **PSU ID:** _____

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

As of the date you submitted the 2018–2019 FAFSA, if:

- **You were single, divorced, separated, or widowed and filed an individual federal tax return, submit the tax information for just yourself.**
- **You were married and filed a joint federal tax return,** submit the tax information for both you and your spouse.
- **You were married and filed separate federal tax returns,** submit tax information for BOTH you and your current spouse.
- **You were separated, divorced, or widowed and filed a joint federal tax return,** write your portion of income on every line of the Tax Return Transcript and submit copies of your 2016 federal W-2s. If you had no W-2 earnings, in 2016 complete the [Student Earnings from Work form](#).

ACCEPTABLE METHODS TO PROVIDE YOUR TAX INFORMATION

IRS Data Retrieval Tool (Recommended Method) - Go to [FAFSA](#), select the “Make FAFSA Correction” link, then the “Financial Information” tab. Continue until you click “Submit.”

IRS Tax Return Transcript:

To get a 2016 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.

Signed Tax Return(s)

Provide a legible, signed copy of page one and two of their 2016 IRS Form 1040 and the applicable schedules that were filed with the IRS.

Income Information 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 Tax Return(s)

If you filed an amended federal tax return and you already submitted the DRT on your 2018-19 FAFSA, please provide a **SIGNED** copy of pages one and two of the IRS 2016 Form 1040X.

If you filed an amended federal tax return and you **did** NOT submit the DRT on your 2018-19 FAFSA, complete **one** of the following options:

- Make a correction to your 2018-19 FAFSA and submit the DRT being sure both the student and parent (if you are a dependent student) sign the FAFSA with the electronic signatures **AND** you must submit a **SIGNED** copy of the IRS 2016 Form 1040X pages one and two.
- Submit a Federal Tax Return Transcript (see instructions above) **AND** you must submit a **SIGNED** copy of pages one and two the IRS 2016 Form 1040X.

If you have Rollover Income: If all or part of the untaxed portion of a 2016 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 (**If you are a dependent student, both you and your parent must sign this document**) stating the rollover amount.