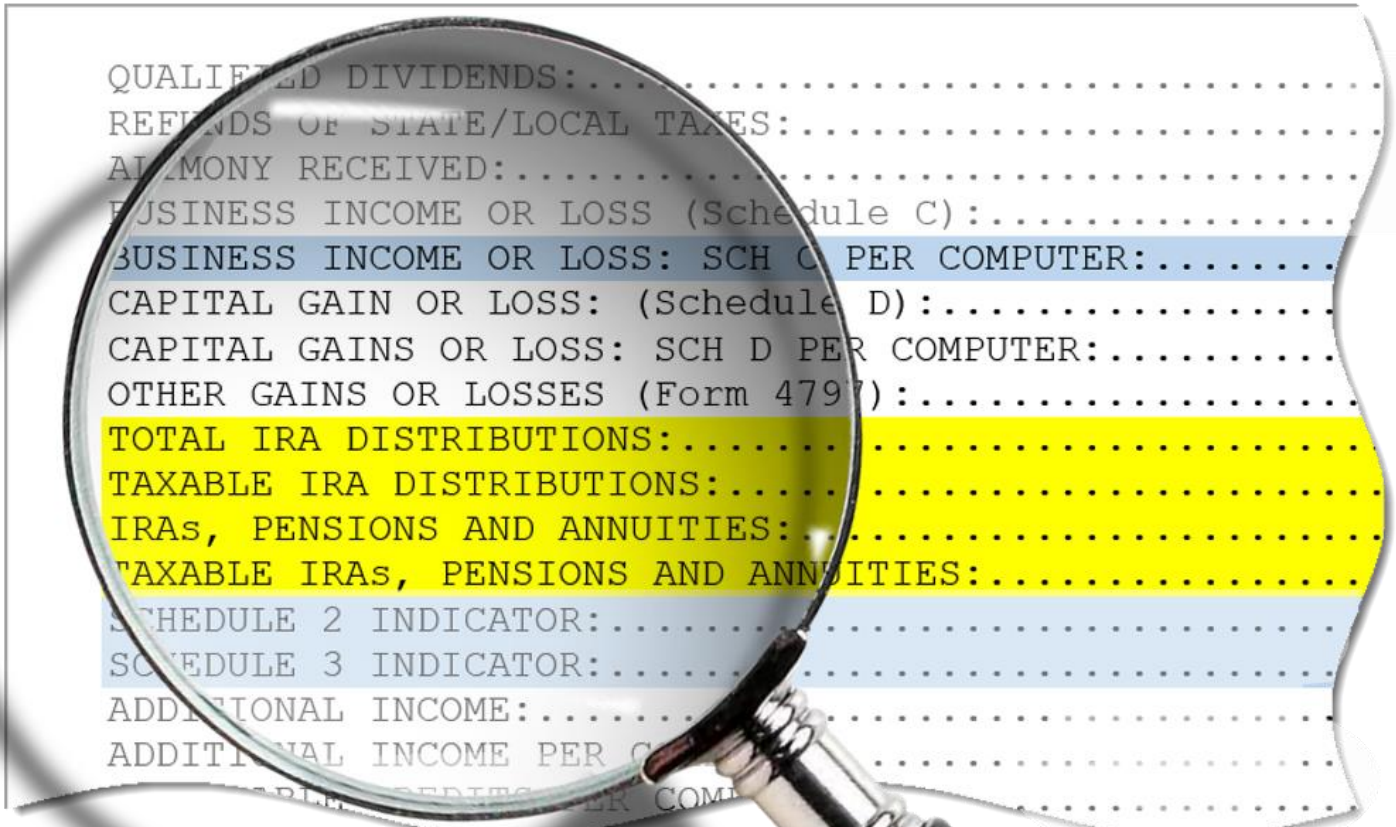


Tax Transcript Decoder[®]

COMPARISON OF 2018 TAX RETURN AND TAX TRANSCRIPT DATA
2020-21 Award Year (Version 1.0)



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October 2019

Comparison of 2018 Tax Return and Tax Transcript Data

FAFSA instructions direct applicants to obtain information from certain lines on IRS income tax returns and schedules. For the most part, the instructions identify the relevant lines on the tax form by line number. These line item numbers do not appear on IRS tax transcripts. Instead, each item is identified by name. When verifying FAFSA data using tax transcripts, it is important to identify the correct answer.

The following pages contain a sample tax return and corresponding tax return transcript. Relevant line items have been highlighted as follows:

Red: information to help cross-reference tax return line items with corresponding data on the tax return transcript.

Yellow: tax return line items that are required verification data elements for the 2020-21 award year.

Blue: tax return line items listed in the FAFSA instructions, which should be reviewed for potential conflicting information.

2018 Tax Return Line Items for 2020-21 Verification

	1040 and Schedules	2020-21 FAFSA Question
AGI	1040 Line 7	36 (S) and 84 (P)
Income tax paid*	1040 Line 13 <i>minus</i> 1040 Schedule 2, Line 46	37 (S) and 85 (P)
Education credits	1040 Schedule 3, Line 50	43a (S) and 91a (P)
IRA deductions and payments	1040 Schedule 1, Line 28 + Line 32	44b (S) and 92b (P)
Tax-exempt interest income	1040 Line 2a	44d (S) and 92d (P)
Untaxed portions of IRA, pension, and annuity distributions (withdrawals)*	1040 Line 4a minus 4b (exclude rollovers)	44e (S) and 92e (P)

2018 Tax Return Transcript Line Items for 2021-21 Verification

	Tax Transcript	2020-21 FAFSA Question
AGI	"ADJUSTED GROSS INCOME PER COMPUTER"	36 (S) and 84 (P)
Income tax paid*	"INCOME TAX AFTER CREDITS PER COMPUTER" <i>minus</i> "EXCESS ADVANCE PREMIUM TAX CREDIT REPAYMENT AMOUNT"	37 (S) and 85 (P)
Education credits	"EDUCATION CREDIT PER COMPUTER"	43a (S) and 91a (P)
IRA deductions and payments	"KEOGH/SEP CONTRIBUTION DEDUCTION" <i>plus</i> "IRA DEDUCTION PER COMPUTER"	44b (S) and 92b (P)
Tax-exempt interest income	"TAX-EXEMPT INTEREST"	44d (S) and 92d (P)
Untaxed portions of IRA, pension, and annuity distributions (withdrawals)*	"IRAs, PENSIONS AND ANNUITIES" <i>minus</i> "TAXABLE IRAs, PENSIONS AND ANNUITIES"*** (exclude rollovers)	44e (S) and 92e (P)

*If negative, enter zero.

***The U.S. Department of Education (ED) is still awaiting IRS confirmation of the Tax Return Transcript line items for "TAXABLE IRAs, PENSIONS AND ANNUITIES."

Sample IRS Form 1040, Page 1: Lucy and John Matterocci

Form **1040** Department of the Treasury—Internal Revenue Service (99) **2018** U.S. Individual Income Tax Return OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

Filing status: Single Married filing jointly Married filing separately Head of household Qualifying widow(er)

Your first name and initial: **Lucy J** Last name: **Matterocci** Your social security number: **XXX XX 1614**

Your standard deduction: Someone can claim you as a dependent You were born before January 2, 1954 You are blind

If joint return, spouse's first name and initial: **John L** Last name: **Matterocci** Spouse's social security number: **XXX XX 7145**

Spouse standard deduction: Someone can claim your spouse as a dependent Spouse was born before January 2, 1954 Full-year health care coverage or exempt (see inst.)
 Spouse is blind Spouse itemizes on a separate return or you were dual-status alien

Home address (number and street). If you have a P.O. box, see instructions. **1234 W Shady Lane** Apt. no. **Presidential Election Campaign (see inst.)** You Spouse

City, town or post office, state, and ZIP code. If you have a foreign address, attach Schedule 6. **Springfield, OR 99999** If more than four dependents, see inst. and ✓ here

Dependents (see instructions):		(2) Social security number	(3) Relationship to you	(4) ✓ if qualifies for (see inst.):	
(1) First name	Last name			Child tax credit	Credit for other dependents
Joey P	Matterocci	XXX XX 5630	Son	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sergio D	Matterocci	XXX XX 7982	Son	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lucia T	DeLuca	XXX XX 5309	Parent	<input type="checkbox"/>	<input checked="" type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>

Sign Here Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Joint return? See instructions. Keep a copy for your records.	Your signature <i>Lucy J. Matterocci</i>	Date 04/15/19	Your occupation Systems Analyst	If the IRS sent you an Identity Protection PIN, enter it here (see inst.)
	Spouse's signature. If a joint return, both must sign. <i>John L Matterocci</i>	Date 04/15/19	Spouse's occupation Nuclear Contracts Manager	If the IRS sent you an Identity Protection PIN, enter it here (see inst.)

Preparer's name	Preparer's signature	PTIN	Firm's EIN	Check if: <input type="checkbox"/> 3rd Party Designee <input type="checkbox"/> Self-employed
Firm's name ▶		Phone no.		
Firm's address ▶				

For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see separate instructions. Cat. No. 11320B Form **1040** (2018)

Sample IRS Form 1040, Page 2: Lucy and John Matterocci

Form 1040 (2018)		Page 2	
1	Wages, salaries, tips, etc. Attach Form(s) W-2	1	122,179 00
2a	Tax-exempt interest	2a	
2b	Taxable interest	2b	2,208 00
3a	Qualified dividends	3a	
3b	Ordinary dividends	3b	
4a	IRAs, pensions, and annuities	4a	
4b	Taxable amount	4b	
5a	Social security benefits	5a	
5b	Taxable amount	5b	
6	Total income. Add lines 1 through 5. Add any amount from Schedule 1, line 22 <u>8,110</u>	6	132,497 00
7	Adjusted gross income. If you have no adjustments to income, enter the amount from line 6; otherwise, subtract Schedule 1, line 36, from line 6	7	132,497 00
8	Standard deduction or itemized deductions (from Schedule A)	8	24,000 00
9	Qualified business income deduction (see instructions)	9	
10	Taxable income. Subtract lines 8 and 9 from line 7. If zero or less, enter -0-	10	108,497 00
11	a Tax (see inst.) <u>15,748</u> (check if any from: 1 <input type="checkbox"/> Form(s) 8814 2 <input type="checkbox"/> Form 4972 3 <input type="checkbox"/>)	11	15,748 00
11	b Add any amount from Schedule 2 and check here <input type="checkbox"/>	11	
12	a Child tax credit/credit for other dependents <u>4,500</u>	12	4,500 00
12	b Add any amount from Schedule 3 and check here <input type="checkbox"/>	12	
13	Subtract line 12 from line 11. If zero or less, enter -0-	13	11,248 00
14	Other taxes. Attach Schedule 4	14	
15	Total tax. Add lines 13 and 14	15	11,248 00
16	Federal income tax withheld from Forms W-2 and 1099	16	11,272 00
17	Refundable credits: a EIC (see inst.) b Sch. 8812	17	
17	Add any amount from Schedule 5	17	
18	Add lines 16 and 17. These are your total payments	18	11,272 00
19	If line 18 is more than line 15, subtract line 15 from line 18. This is the amount you overpaid	19	24 00
20a	Amount of line 19 you want refunded to you. If Form 8888 is attached, check here <input type="checkbox"/>	20a	24 00
20b	Routing number c Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings		
20d	Account number		
21	Amount of line 19 you want applied to your 2019 estimated tax	21	
22	Amount you owe. Subtract line 18 from line 15. For details on how to pay, see instructions	22	
23	Estimated tax penalty (see instructions)	23	

INCOME TAX PAID
1040 Line 13
minus
Schedule 2, Line 46
(if negative amount, enter zero)

Standard Deduction for—
• Single or married filing separately, \$12,000
• Married filing jointly or Qualifying widow(er), \$24,000
• Head of household, \$18,000
• If you checked any box under Standard deduction, see instructions.

Refund
Direct deposit? See instructions.

Go to www.irs.gov/Form1040 for instructions and the latest information.

Form **1040** (2018)

Sample IRS Form 1040 Schedule 1: Lucy and John Matterocci

SCHEDULE 1 (Form 1040) Department of the Treasury Internal Revenue Service	Additional Income and Adjustments to Income ▶ Attach to Form 1040. ▶ Go to www.irs.gov/Form1040 for instructions and the latest information.	OMB No. 1545-0074 2018 Attachment Sequence No. 01
Name(s) shown on Form 1040		Your social security number
Additional Income	1-9b Reserved 10 Taxable refunds, credits, or offsets of state and local income taxes 11 Alimony received 12 Business income or (loss). Attach Schedule C or C-EZ 13 Capital gain or (loss). Attach Schedule D if required. If not required, check here <input type="checkbox"/> 14 Other gains or (losses). Attach Form 4797 15a Reserved 16a Reserved 17 Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E 18 Farm income or (loss). Attach Schedule F 19 Unemployment compensation 20a Reserved 21 Other income. List type and amount 22 Combine the amounts in the far right column. If you don't have any adjustments to income, enter here and include on Form 1040, line 6. Otherwise, go to line 23	1-9b 10 814 00 11 12 13 14 15b 16b 17 18 19 7,296 00 20b 21 22 8,110 00
Adjustments to Income	23 Educator expenses 24 Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106 25 Health savings account deduction. Attach Form 8889 26 Moving expenses for members of the Armed Forces. Attach Form 3903 27 Deductible part of self-employment tax. Attach Schedule SE 28 Self-employed SEP, SIMPLE, and qualified plans 29 Self-employed health insurance deduction 30 Penalty on early withdrawal of savings 31a Alimony paid b Recipient's SSN 32 IRA deduction 33 Student loan interest deduction 34 Reserved 35 Reserved 36 Add lines 23 through 35	23 24 25 26 27 28 29 30 31a 32 33 34 35 36

For Paperwork Reduction Act Notice, see your tax return instructions.

Cat. No. 71479F

Schedule 1 (Form 1040) 2018

*Income earned from work: IRS Form 1040--Line 1, Schedule 1--Lines 12 and 18, Schedule K-1 (IRS Form 1065)--Box 14 (Code A). If any individual earning item is negative, do not include that item in your calculation.

Sample IRS Form 1040 Schedule 2 (not filed by Lucy and John)

SCHEDULE 2
(Form 1040)

Tax

OMB No. 1545-0074

2018
Attachment
Sequence No. **02**

Department of the Treasury
Internal Revenue Service

▶ Attach to Form 1040.

▶ Go to www.irs.gov/Form1040 for instructions and the latest information.

Name(s) shown on Form 1040

Your social security number

Tax	38-44	Reserved		38-44	
	45	Alternative minimum tax. Attach Form 6251		45	
	46	Excess advance premium tax credit repayment. Attach Form 8882		46	
	47	Add the amounts in the far right column. Enter here and include on Form 1040, line 11		47	

INCOME TAX PAID
1040 Line 13
minus
Schedule 2, Line 46
(if negative amount, enter zero)

For Paperwork Reduction Act Notice, see your tax return instructions.

Cat. No. 71478U

Schedule 2 (Form 1040) 2018

Sample IRS Form 1040 Schedule 3 (not filed by Lucy and John)

**SCHEDULE 3
(Form 1040)**

Department of the Treasury
Internal Revenue Service

Nonrefundable Credits

▶ Attach to Form 1040.
▶ Go to www.irs.gov/Form1040 for instructions and the latest information.

OMB No. 1545-0074

2018
Attachment
Sequence No. **03**

Name(s) shown on Form 1040

Your social security number

Nonrefundable Credits	48	Foreign tax credit. Attach Form 1116 if required	48		
	49	Credit for child and dependent care expenses. Attach Form 2441	49		
	50	Education credits from Form 8863, line 19	50		
	51	Retirement savings contributions credit. Attach Form 8880	51		
	52	Reserved	52		
	53	Residential energy credit. Attach Form 5695	53		
	54	Other credits from Form a <input type="checkbox"/> 3800 b <input type="checkbox"/> 8801 c <input type="checkbox"/> _____	54		
	55	Add the amounts in the far right column. Enter here and include on Form 1040, line 12	55		

For Paperwork Reduction Act Notice, see your tax return instructions.

Cat. No. 71480G

Schedule 3 (Form 1040) 2018

Sample Tax Transcript 1040: Lucy and John Matterocci



Internal Revenue Service

United States Department of the Treasury

This Product Contains Sensitive Taxpayer Data

Request Date: 08-30-2019
 Response Date: 08-30-2019
 Tracking Number: XXXXXXXXXXXXX

Tax Return Transcript

SSN Provided: XXX-XX-1614
 Tax Period Ending: Dec. 31, 2018

The following items reflect the amount as shown on the return (PR), and the amount as adjusted (PC), if applicable. They do not show subsequent activity on the account.

SSN: XXX-XX-1614
 SPOUSE SSN: XXX-XX-7145

NAME(S) SHOWN ON RETURN: LUCY JOHN MATT

ADDRESS: 1234 W

1040: p.1 FILING STATUS: Married Filed Joint
 FORM NUMBER: 1040
 CYCLE POSTED: 20191205
 RECEIVED DATE: Apr.15, 2019
 REMITTANCE: \$0.00
 EXEMPTION NUMBER: 05
 OTHER DEPENDENT CREDIT TOTAL ELIGIBLE PER COMPUTER: 01
 OTHER DEPENDENT CREDIT TOTAL ELIGIBLE VERIFIED: 00
 EXEMPTION NUMBER: 05
 DEPENDENT 1 NAME CTRL: DELU
 DEPENDENT 1 SSN: XXX-XX-5630
 1040: p.1 DEPENDENT 2 NAME CTRL: MATT
 DEPENDENT 2 SSN: XXX-XX-7982
 DEPENDENT 3 NAME CTRL: MATT
 DEPENDENT 3 SSN: XXX-XX-5309
 DEPENDENT 4 NAME CTRL:
 DEPENDENT 4 SSN:
 PTIN:
 PREPARER EIN:

Income

1040: 1 * WAGES, SALARIES, TIPS, ETC:.....\$122,179.00
 TAXABLE INTEREST INCOME: SCH B:.....\$2,208.00
 1040: 2a TAX-EXEMPT INTEREST:.....\$0.00
 ORDINARY DIVIDEND INCOME: SCH B:.....\$0.00
 QUALIFIED DIVIDENDS:.....\$0.00
 REFUNDS OF STATE/LOCAL TAXES:.....\$814.00
 ALIMONY RECEIVED:.....\$0.00
 BUSINESS INCOME OR LOSS (Schedule C):.....\$0.00
 Sch 1: 12 BUSINESS INCOME OR LOSS: SCH C PER COMPUTER:.....\$0.00
 CAPITAL GAIN OR LOSS: (Schedule D):.....\$0.00
 CAPITAL GAINS OR LOSS: SCH D PER COMPUTER:.....\$0.00
 OTHER GAINS OR LOSSES (Form 4797):.....\$0.00
 TOTAL IRA DISTRIBUTIONS:.....\$0.00
 TAXABLE IRA DISTRIBUTIONS:.....\$0.00
 1040: 4a IRAs, PENSIONS AND ANNUITIES:.....\$0.00
 1040: 4b TAXABLE IRAs, PENSIONS AND ANNUITIES:.....\$0.00
 ** SCHEDULE 2 INDICATOR:.....0
 SCHEDULE 3 INDICATOR:.....0

*Income earned from work: IRS Form 1040--Line 1, Schedule 1--Lines 12 and 18, Schedule K-1 (IRS Form 1065)--Box 14 (Code A). If any individual earning item is negative, do not include that item in your calculation.

**Value of '0' denotes schedule was not filed.

ADDITIONAL INCOME:.....	\$8,110.00
ADDITIONAL INCOME PER COMPUTER:.....	\$8,110.00
REFUNDABLE CREDITS PER COMPUTER:.....	\$0.00
REFUNDABLE EDUCATION CREDIT PER COMPUTER:.....	\$0.00
QUALIFIED BUSINESS INCOME DEDUCTION:.....	\$0.00
RENT/ROYALTY/PARTNERSHIP/ESTATE (Schedule E):.....	\$0.00
RENT/ROYALTY/PARTNERSHIP/ESTATE (Schedule E) PER COMPUTER:.....	\$0.00
RENT/ROYALTY INCOME/LOSS PER COMPUTER:.....	\$0.00
ESTATE/TRUST INCOME/LOSS PER COMPUTER:.....	\$0.00
PARTNERSHIP/S-CORP INCOME/LOSS PER COMPUTER PER COMPUTER:.....	\$0.00
FARM INCOME OR LOSS (Schedule F):.....	\$0.00
Sch 1: 18 * FARM INCOME OR LOSS (Schedule F) PER COMPUTER:.....	\$0.00
UNEMPLOYMENT COMPENSATION:.....	\$7,296.00
TOTAL SOCIAL SECURITY BENEFITS:.....	\$0.00
TAXABLE SOCIAL SECURITY BENEFITS:.....	\$0.00
TAXABLE SOCIAL SECURITY BENEFITS PER COMPUTER:.....	\$0.00
OTHER INCOME:.....	\$0.00
SCHEDULE EIC SE INCOME PER COMPUTER:.....	\$0.00
SCHEDULE EIC EARNED INCOME PER COMPUTER:.....	\$0.00
SCH EIC DISQUALIFIED INC COMPUTER:.....	\$0.00
TOTAL INCOME:.....	\$132,497.00
TOTAL INCOME PER COMPUTER:.....	\$132,497.00

Adjustments to Income

EDUCATOR EXPENSES:.....	\$0.00
EDUCATOR EXPENSES PER COMPUTER:.....	\$0.00
RESERVIST AND OTHER BUSINESS EXPENSE:.....	\$0.00
HEALTH SAVINGS ACCT DEDUCTION:.....	\$0.00
Sch 1: 25 HEALTH SAVINGS ACCT DEDUCTION PER COMPTR:.....	\$0.00
MOVING EXPENSES: F3903:.....	\$0.00
SELF EMPLOYMENT TAX DEDUCTION:.....	\$0.00
SELF EMPLOYMENT TAX DEDUCTION PER COMPUTER:.....	\$0.00
SELF EMPLOYMENT TAX DEDUCTION VERIFIED:.....	\$0.00
Sch 1: 28 KEOGH/SEP CONTRIBUTION DEDUCTION:.....	\$0.00
SELF-EMP HEALTH INS DEDUCTION:.....	\$0.00
EARLY WITHDRAWAL OF SAVINGS PENALTY:.....	\$0.00
ALIMONY PAID SSN:.....	\$0.00
ALIMONY PAID:.....	\$0.00
IRA DEDUCTION:.....	\$0.00
Sch 1: 32 IRA DEDUCTION PER COMPUTER:.....	\$0.00
STUDENT LOAN INTEREST DEDUCTION:.....	\$0.00
STUDENT LOAN INTEREST DEDUCTION PER COMPUTER:.....	\$0.00
STUDENT LOAN INTEREST DEDUCTION VERIFIED:.....	\$0.00
TUITION AND FEES DEDUCTION:.....	\$0.00
TUITION AND FEES DEDUCTION PER COMPUTER:.....	\$0.00
DOMESTIC PRODUCTION ACTIVITIES DEDUCTION:.....	\$0.00
DOMESTIC PRODUCTION ACTIVITIES DEDUCTION PER COMPUTER:.....	\$0.00
OTHER ADJUSTMENTS:.....	\$0.00
ARCHER MSA DEDUCTION:.....	\$0.00
ARCHER MSA DEDUCTION PER COMPUTER:.....	\$0.00
TOTAL ADJUSTMENTS:.....	\$0.00
TOTAL ADJUSTMENTS PER COMPUTER:.....	\$0.00
ADJUSTED GROSS INCOME:.....	\$132,497.00
1040: 7 ADJUSTED GROSS INCOME PER COMPUTER:.....	\$132,497.00

Tax and Credits

65-OR-OVER:.....	NO
BLIND:.....	NO
SPOUSE 65-OR-OVER:.....	NO
SPOUSE BLIND:.....	NO
STANDARD DEDUCTION PER COMPUTER:.....	\$24,000.00
ADDITIONAL STANDARD DEDUCTION PER COMPUTER:.....	\$0.00
TAX TABLE INCOME PER COMPUTER:.....	\$108,497.00
EXEMPTION AMOUNT PER COMPUTER:.....	\$0.00
TAXABLE INCOME:.....	\$108,497.00
TAXABLE INCOME PER COMPUTER:.....	\$108,497.00

**Income earned from work: IRS Form 1040 Line 1 Schedule 1 Lines 12 and 18 Schedule K-1 (IRS Form 1065) Box 14 (Code A) . If any individual earning item is negative, do not include that item in your calculation.*

	TOTAL POSITIVE INCOME PER COMPUTER:.....	\$132,497.00
	TENTATIVE TAX:.....	\$15,748.00
	TENTATIVE TAX PER COMPUTER:.....	\$15,748.00
	FORM 8814 ADDITIONAL TAX AMOUNT:.....	\$0.00
	TAX ON INCOME LESS SOC SEC INCOME PER COMPUTER:.....	\$0.00
	FORM 6251 ALTERNATIVE MINIMUM TAX:.....	\$0.00
	FORM 6251 ALTERNATIVE MINIMUM TAX PER COMPUTER:.....	\$0.00
	FOREIGN TAX CREDIT:.....	\$0.00
	FOREIGN TAX CREDIT PER COMPUTER:.....	\$0.00
	FOREIGN INCOME EXCLUSION PER COMPUTER:.....	\$0.00
	FOREIGN INCOME EXCLUSION TAX PER COMPUTER:.....	\$0.00
Sch 2: 46 *	EXCESS ADVANCE PREMIUM TAX CREDIT REPAYMENT AMOUNT:.....	\$0.00
	EXCESS ADVANCE PREMIUM TAX CREDIT REPAYMENT VERIFIED AMOUNT:.....	\$0.00
	CHILD & DEPENDENT CARE CREDIT:.....	\$0.00
	CHILD & DEPENDENT CARE CREDIT PER COMPUTER:.....	\$0.00
	CREDIT FOR ELDERLY AND DISABLED:.....	\$0.00
	CREDIT FOR ELDERLY AND DISABLED PER COMPUTER:.....	\$0.00
	EDUCATION CREDIT:.....	\$0.00
Sch 3: 50	EDUCATION CREDIT PER COMPUTER:.....	\$0.00
	GROSS EDUCATION CREDIT PER COMPUTER:.....	\$0.00
	RETIREMENT SAVINGS CNTRB CREDIT:.....	\$0.00
	RETIREMENT SAVINGS CNTRB CREDIT PER COMPUTER:.....	\$0.00
	PRIM RET SAV CNTRB: F8880 LN6A:.....	\$0.00
	SEC RET SAV CNTRB: F8880 LN6B:.....	\$0.00
	TOTAL RETIREMENT SAVINGS CONTRIBUTION: F8880 CMPTR:.....	\$0.00
	RESIDENTIAL ENERGY CREDIT:.....	\$0.00
	RESIDENTIAL ENERGY CREDIT PER COMPUTER:.....	\$0.00
	CHILD AND OTHER DEPENDENT CREDIT:.....	\$4,500.00
	CHILD AND OTHER DEPENDENT CREDIT PER COMPUTER:.....	\$4,500.00
	ADOPTION CREDIT: F8839:.....	\$0.00
	ADOPTION CREDIT PER COMPUTER:.....	\$0.00
	FORM 8396 MORTGAGE CERTIFICATE CREDIT:.....	\$0.00
	FORM 8396 MORTGAGE CERTIFICATE CREDIT PER COMPUTER:.....	\$0.00
	F3800, F8801 AND OTHER CREDIT AMOUNT:.....	\$0.00
	FORM 3800 GENERAL BUSINESS CREDITS:.....	\$0.00
	FORM 3800 GENERAL BUSINESS CREDITS PER COMPUTER:.....	\$0.00
	PRIOR YR MIN TAX CREDIT: F8801:.....	\$0.00
	PRIOR YR MIN TAX CREDIT: F8801 PER COMPUTER:.....	\$0.00
	F8936 ELECTRIC MOTOR VEHICLE CREDIT AMOUNT:.....	\$0.00
	F8936 ELECTRIC MOTOR VEHICLE CREDIT PER COMPUTER:.....	\$0.00
	F8910 ALTERNATIVE MOTOR VEHICLE CREDIT AMOUNT:.....	\$0.00
	F8910 ALTERNATIVE MOTOR VEHICLE CREDIT PER COMPUTER:.....	\$0.00
	OTHER CREDITS:.....	\$0.00
	TOTAL CREDITS:.....	\$4,500.00
	TOTAL CREDITS PER COMPUTER:.....	\$4,500.00
**	INCOME TAX AFTER CREDITS PER COMPUTER:.....	\$11,248.00
1040: 13	** "Income Tax After Credits Per Computer"	\$11,248.00
Sch 2: 46	- * "Excess Advance Premium Tax Credit Repayment Amount"	- \$0.00
	= *** Income Tax Paid	= \$11,248.00

Other Taxes

	SE TAX:.....	\$0.00
	SE TAX PER COMPUTER:.....	\$0.00
	SOCIAL SECURITY AND MEDICARE TAX ON UNREPORTED TIPS:.....	\$0.00
	SOCIAL SECURITY AND MEDICARE TAX ON UNREPORTED TIPS PER COMPUTER:.....	\$0.00
	TAX ON QUALIFIED PLANS F5329 (PR):.....	\$0.00
	TAX ON QUALIFIED PLANS F5329 PER COMPUTER:.....	\$0.00
	IRAF TAX PER COMPUTER:.....	\$0.00
	TP TAX FIGURES (REDUCED BY IRAF) PER COMPUTER:.....	\$11,248.00
	IMF TOTAL TAX (REDUCED BY IRAF) PER COMPUTER:.....	\$11,248.00
	TOTAL OTHER TAXES PER COMPUTER:.....	\$0.00
	UNPAID FICA ON REPORTED TIPS:.....	\$0.00
	F8959-8960 OTHER TAXES:.....	\$0.00

***If Income Tax Paid is negative, use zero

TOTAL OTHER TAXES:.....	\$0.00
RECAPTURE TAX: F8611:.....	\$0.00
HOUSEHOLD EMPLOYMENT TAXES:.....	\$0.00
HOUSEHOLD EMPLOYMENT TAXES PER COMPUTER:.....	\$0.00
HEALTH CARE RESPONSIBILITY PENALTY:.....	\$0.00
HEALTH CARE RESPONSIBILITY PENALTY VERIFIED:.....	\$0.00
HEALTH COVERAGE RECAPTURE: F8885:.....	\$0.00
RECAPTURE TAXES:.....	\$0.00
TOTAL ASSESSMENT PER COMPUTER:.....	\$11,248.00
TOTAL TAX LIABILITY TP FIGURES:.....	\$11,248.00
TOTAL TAX LIABILITY TP FIGURES PER COMPUTER:.....	\$11,248.00

Payments

FEDERAL INCOME TAX WITHHELD:.....	\$11,272.00
HEALTH CARE: INDIVIDUAL RESPONSIBILTY:.....	\$0.00
HEALTH CARE FULL-YEAR COVERAGE INDICATOR:.....	1
ESTIMATED TAX PAYMENTS:.....	\$0.00
OTHER PAYMENT CREDIT:.....	\$0.00
REFUNDABLE EDUCATION CREDIT:.....	\$0.00
REFUNDABLE EDUCATION CREDIT PER COMPUTER:.....	\$0.00
REFUNDABLE EDUCATION CREDIT VERIFIED:.....	\$0.00
REFUNDABLE CREDITS:.....	\$0.00
EARNED INCOME CREDIT:.....	\$0.00
EARNED INCOME CREDIT PER COMPUTER:.....	\$0.00
EARNED INCOME CREDIT NONTAXABLE COMBAT PAY:.....	\$0.00
SCHEDULE 8812 NONTAXABLE COMBAT PAY:.....	\$0.00
EXCESS SOCIAL SECURITY & RRTA TAX WITHHELD:.....	\$0.00
SCHEDULE 8812 TOT SS/MEDICARE WITHHELD:.....	\$0.00
SCHEDULE 8812 ADDITIONAL CHILD TAX CREDIT:.....	\$0.00
SCHEDULE 8812 ADDITIONAL CHILD TAX CREDIT PER COMPUTER:.....	\$0.00
SCHEDULE 8812 ADDITIONAL CHILD TAX CREDIT VERIFIED:.....	\$0.00
AMOUNT PAID WITH FORM 4868:.....	\$0.00
FORM 2439 REGULATED INVESTMENT COMPANY CREDIT:.....	\$0.00
FORM 4136 CREDIT FOR FEDERAL TAX ON FUELS:.....	\$0.00
FORM 4136 CREDIT FOR FEDERAL TAX ON FUELS PER COMPUTER:.....	\$0.00
HEALTH COVERAGE TX CR: F8885:.....	\$0.00
SEC 965 TAX INSTALLMENT:.....	\$0.00
SEC 965 TAX LIABILITY:.....	\$0.00
PREMIUM TAX CREDIT AMOUNT:.....	\$0.00
PREMIUM TAX CREDIT VERIFIED AMOUNT:.....	\$0.00
PRIMARY NAP FIRST TIME HOME BUYER INSTALLMENT AMT:.....	\$0.00
SECONDARY NAP FIRST TIME HOME BUYER INSTALLMENT AMT:.....	\$0.00
FIRST TIME HOMEBUYER CREDIT REPAYMENT AMOUNT:.....	\$0.00
FORM 5405 TOTAL HOMEBUYERS CREDIT REPAYMENT PER COMPUTER:.....	\$0.00
SMALL EMPLOYER HEALTH INSURANCE PER COMPUTER:.....	\$0.00
SMALL EMPLOYER HEALTH INSURANCE PER COMPUTER (2):.....	\$0.00
FORM 2439 AND OTHER CREDITS:.....	\$0.00
TOTAL PAYMENTS:.....	\$11,272.00
TOTAL PAYMENTS PER COMPUTER:.....	\$11,272.00

Refund or Amount Owed

REFUND AMOUNT:.....	\$-24.00
APPLIED TO NEXT YEAR'S ESTIMATED TAX:.....	\$0.00
ESTIMATED TAX PENALTY:.....	\$0.00
TAX ON INCOME LESS STATE REFUND PER COMPUTER:.....	\$0.00
BAL DUE/OVER PYMT USING TP FIG PER COMPUTER:.....	\$-24.00
BAL DUE/OVER PYMT USING COMPUTER FIGURES:.....	\$-24.00
FORM 8888 TOTAL REFUND PER COMPUTER:.....	\$0.00

Third Party Designee

THIRD PARTY DESIGNEE ID NUMBER:.....	
AUTHORIZATION INDICATOR:.....	0
THIRD PARTY DESIGNEE NAME:.....	

Interest and Dividends

GROSS SCHEDULE B INTEREST:.....\$2,208.00
TAXABLE INTEREST INCOME:.....\$2,208.00
EXCLUDABLE SAVINGS FROM BOND INT:.....\$0.00
GROSS SCHEDULE B DIVIDENDS:.....\$0.00
DIVIDEND INCOME:.....\$0.00
FOREIGN ACCOUNTS IND:.....NONE
REQUIRED TO FILE FINCEN FORM 114:.....NONE

Form 8863 - Education Credits (Hope and Lifetime Learning Credits)

PART III - ALLOWABLE EDUCATION CREDITS

GROSS EDUCATION CR PER COMPUTER:.....\$0.00
TOTAL EDUCATION CREDIT AMOUNT:.....\$0.00
TOTAL EDUCATION CREDIT AMOUNT PER COMPUTER:.....\$0.00

This Product Contains Sensitive Taxpayer Data

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Appendices

Appendix A

Sample 2018 W-2 Form, Reference Guide for Box 12 Codes, and Sample Form W-2 Wage and Tax Statement

Appendix B

Criteria for 2020-21 Simplified Needs Formulas and Automatic Zero EFC Calculation

Appendix C

2018 IRS Form 1040: Indicators That Schedule 1, 2 or 3 was Required

Appendix D

Current Year Transcript Availability

Appendix E

References, Resources and Websites – Tax Returns and Transcripts

Appendix A

Sample 2018 W-2 Form

In addition to wages earned, the W-2 form may reveal sources of untaxed income, such as payments to tax-deferred pension and savings plan amounts reported in boxes 12a through 12 d, code D, E, F, G, H and S.

Schools are not required to review income listed in box 14, however if you are aware that a box 14 item should be reported (i.e. clergy parsonage allowances) then you would count that amount as untaxed income.

a Employee's social security number		OMB No. 1545-0008				
b Employer identification number (EIN)		1 Wages, tips, other compensation 47,355.52	2 Federal income tax withheld 4,072.11			
c Employer's name, address, and ZIP code		3 Social security wages 54,206.10	4 Social security tax withheld 3,360.82			
		5 Medicare wages and tips 54,206.10	6 Medicare tax withheld 786.01			
		7 Social security tips	8 Allocated tips			
d Control number		9 Verification code		10 Dependent care benefits		
e Employee's first name and initial Last name Suff.		11 Nonqualified plans		12a E 3,491.28		
		13 Statutory employee Retirement plan Third-party sick pay <input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>		12b J 2,116.89		
		14 Other		12c DD 8,850.12		
				12d		
f Employee's address and ZIP code						
15 State	Employer's state ID number	16 State wages, tips, etc. 47,355.52	17 State income tax 924.15	18 Local wages, tips, etc.	19 Local income tax	20 Locality name

Form **W-2** Wage and Tax Statement **2018** Department of the Treasury—Internal Revenue Service

Form W-2 Reference Guide for Box 12 Codes

A	Uncollected social security or RRTA tax on tips	K	20% excise tax on excess golden parachute payments	V	Income from exercise of nonstatutory stock option(s)
B	Uncollected Medicare tax on tips	L	Substantiated employee business expense reimbursements	W	Employer contributions (including amounts employee elected to contribute using a cafeteria plan) to employee's health savings account
C	Taxable cost of group-term life insurance over \$50,000	M	Uncollected social security or RRTA tax on taxable cost of group-term life insurance over \$50,000 (former employees only)	Y	Deferrals under a section 409A nonqualified deferred compensation plan
D	Elective deferrals to a section 401(k) cash or deferred arrangement (including deferrals under a SIMPLE 401(k) arrangement)	N	Uncollected Medicare tax on taxable cost of group-term life insurance over \$50,000 (former employees only)	Z	Income under a nonqualified deferred compensation plan that fails to satisfy section 409A
E	Elective deferrals under a section 403(b) salary reduction agreement	P	Excludable moving expense reimbursements paid directly to a member of the U.S. Armed Forces	AA	Designated Roth contributions under a section 401(k) plan
F	Elective deferrals under a section 408(k)(6) salary reduction SEP	Q	Nontaxable combat pay	BB	Designated Roth contributions under a section 403(b) plan
G	Elective deferrals and employer contributions (including nonelective deferrals) to a section 457(b) deferred compensation plan	R	Employer contributions to an Archer MSA	DD	Cost of employer-sponsored health coverage
H	Elective deferrals to a section 501(c)(18)(D) tax-exempt organization plan	S	Employee salary reduction contributions under a section 408(p) SIMPLE plan	EE	Designated Roth contributions under a governmental section 457(b) plan
J	Nontaxable sick pay	T	Adoption benefits	FF	Permitted benefits under a qualified small employer health reimbursement arrangement

(For additional codes and complete descriptions, visit https://www.irs.gov/pub/irs-pdf/fw2_18.pdf)

Sample 2018 W-2 Wage and Tax Statement



Internal Revenue Service

United States Department of the Treasury

This Product Contains Sensitive Taxpayer Data

Request Date: 08-30-2019 *
Response Date: 08-30-2019
Tracking Number: XXXXXXXXXXXXX

Wage and Income Transcript

SSN Provided: XXX-XX-1614
Tax Period Ending: December 2018

Form W-2 Wage and Tax Statement

Employer:
Employer Identification Number (EIN):

Employee:
Employee's Social Security Number: XXX-XX-1614
LUCY JANI MATT
1234 W

Submission Type:.....	Original document	
Wages, Tips and Other Compensation:.....	\$47,355.00	- - - - -> Box 1
Federal Income Tax Withheld:.....	\$4,072.00	- -> Box 2
Social Security Wages:.....	\$54,206.00	- - - - -> Box 3
Social Security Tax Withheld:.....	\$3,360.00	- -> Box 4
Medicare Wages and Tips:.....	\$54,206.00	- - - - -> Box 5
Medicare Tax Withheld:.....	\$786.00	- -> Box 6
Social Security Tips:.....	\$0.00	- - - - -> Box 7
Allocated Tips:.....	\$0.00	- -> Box 8
Dependent Care Benefits:.....	\$0.00	- - - - -> Box 10
Deferred Compensation:.....	\$3,491.00	- -> Box 12a-d (D, E, F, G, H)
Code "Q" Nontaxable Combat Pay:.....	\$0.00	
Code "W" Employer Contributions to a Health Savings Account:.....	\$0.00	
Code "Y" Deferrals under a section 409A nonqualified Deferred Compensation plan:.....	\$0.00	
Code "Z" Income under section 409A on a nonqualified Deferred Compensation plan:.....	\$0.00	
Code "R" Employer's Contribution to MSA:.....	\$0.00	
Code "S" Employer's Contribution to Simple Account:.....	\$0.00	- - - - -> Box 12a-d (S)
Code "T" Expenses Incurred for Qualified Adoptions:.....	\$0.00	
Code "V" Income from exercise of non-statutory stock options:.....	\$0.00	
Code "AA" Designated Roth Contributions under a Section 401(k) Plan:.....	\$0.00	
Code "BB" Designated Roth Contributions under a Section 403(b) Plan:.....	\$0.00	
Code "DD" Cost of Employer-Sponsored Health Coverage:.....	\$8,850.00	
Code "EE" Designated ROTH Contributions Under a Governmental Section 457(b) Plan:.....	\$0.00	
Code "FF" Permitted benefits under a qualified small employer health reimbursement arrangement:.....	\$0.00	

* Current tax year information may not be available until July.

Note: Payments to tax-deferred pension and retirement savings plans under "Deferred Compensation" and "Code 'S' Employer's Contribution to Simple Account" are not required to be verified unless there is conflicting information. "Deferred Compensation" is assumed to include W-2 Box 12a to 12d, Codes D, E, F, G, and H. If the total for this line plus the line for Code 'S' do not match the amount reported on the FAFSA, the school will need to collect additional documentation from the student or parent, as applicable. Schools may obtain a signed statement indicating the correct amounts or some other documentation the school deems appropriate to resolve the conflict.

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Appendix B

Criteria for 2020-21 Simplified Needs Formulas and Automatic Zero EFC Calculation

The following criteria is used to determine if students qualify to have their EFCs calculated using a simplified formula.

	Simplified (assets not considered)	Automatic Zero EFC
Formula A Dependent student	<ul style="list-style-type: none"> ▪ Parents had a 2018 AGI of \$49,999 or less (for tax filers), or if non-filers, income earned from work in 2018 is \$49,999 or less; and ▪ Either <ul style="list-style-type: none"> - Parents filed a 2018 IRS Form 1040, but did not file a Schedule 1*, filed a tax form from a Trust Territory**, or were not required to file any income tax return or - Anyone in the parents' household size (as defined on the FAFSA) received any designated means-tested federal benefits*** during 2018 or 2019, or - Parent is a dislocated worker. 	<ul style="list-style-type: none"> ▪ Parents had a 2018 AGI of \$26,000 or less (for tax filers), or if non-filers, income earned from work in 2018 is \$26,000 or less; and ▪ Either <ul style="list-style-type: none"> - Parents filed a 2018 IRS Form 1040, but did not file a Schedule 1*, filed a tax form from a Trust Territory**, or were not required to file any income tax return or - Anyone in the parents' household size (as defined on the FAFSA) received any designated means-tested federal benefits*** during 2018 or 2019, or - Parent is a dislocated worker.
Formula B Independent student without dependents (other than a spouse)	<ul style="list-style-type: none"> ▪ Student (and spouse, if any) had a 2018 AGI of \$49,999 or less (for tax filers), or if non-filers, income earned from work in 2018 is \$49,999 or less; and ▪ Either <ul style="list-style-type: none"> - Student (and spouse, if any) filed a 2018 IRS Form 1040, but did not file a Schedule 1*, filed a tax form from a Trust Territory**, or were not required to file any income tax return or - Anyone in the student's household size (as defined on the FAFSA) received any designated means-tested federal benefits*** during 2018 or 2019, or - Student (or spouse, if any) is a dislocated worker. 	Not applicable.
Formula C Independent student with dependents (other than a spouse)	<ul style="list-style-type: none"> ▪ Student (and spouse, if any) had a 2018 AGI of \$49,999 or less (for tax filers), or if non-filers, income earned from work in 2018 is \$49,999 or less; and ▪ Either <ul style="list-style-type: none"> - Student (and spouse, if any) filed a 2018 IRS Form 1040, but did not file a Schedule 1*, filed a tax form from a Trust Territory**, or were not required to file any income tax return or - Anyone in the student's household size (as defined on the FAFSA) received any designated means-tested federal benefits*** during 2018 or 2019, or - Student (or spouse, if any) is a dislocated worker. 	<ul style="list-style-type: none"> ▪ Student (and spouse, if any) had a 2018 AGI of \$26,000 or less (for tax filers), or if non-filers, income earned from work in 2018 is \$26,000 or less; and ▪ Either <ul style="list-style-type: none"> - Student (and spouse, if any) filed a 2018 IRS Form 1040, but did not file a Schedule 1*, filed a tax form from a Trust Territory**, or were not required to file any income tax return or - Anyone in the student's household size (as defined on the FAFSA) received any designated means-tested federal benefits*** during 2018 or 2019, or - Student (or spouse, if any) is a dislocated worker.

*May also qualify if Schedule 1 was filed to report **only** a capital gain (line 13 – may not be a negative value), unemployment compensation (line 19), other income to report an Alaska Permanent Fund dividend (line 21 – may not be a negative value), educator expenses (line 23), IRA deduction (line 32), and/or student loan interest deduction (line 33).

**Trust Territory: Commonwealth of Puerto Rico, Guam, American Samoa, the U.S. Virgin Islands, the Republic of the Marshall Islands, the Federated States of Micronesia, or Palau.

***Benefits include Medicaid, Supplemental Security Income (SSI), Supplemental Nutrition Assistance (SNAP), Free or Reduced Price School Lunch, Temporary Assistance for Needy Families (TANF), and Special Supplemental Nutrition Program for Women, Infants and Children (WIC).

Appendix C

2018 IRS Form 1040 – Indicators That Schedule 1, 2 or 3 was Required

Many taxpayers will only need to file Form 1040 and no schedules. Those with more complicated tax returns will need to complete one or more of the 2018 Form 1040 Schedules along with their Form 1040. These taxpayers include people claiming certain deductions or credits or owing additional taxes. Below is a general guide indicating whether Schedules 1, 2, or 3 need to be filed based on specific circumstances. Under these conditions, the school should receive a copy of that schedule to complete verification.

IF YOU...	THEN USE...
<p>Have additional income, such as capital gains, unemployment compensation, prize or award money, or gambling winnings.</p> <p>Have any deductions to claim, such as student loan interest deduction, self-employment tax, or educator expenses.</p> <ul style="list-style-type: none"> ▪ 1040 Line 6: Schedule 1 is completed if there is an amount on the <i>inner line</i> of 1040 Line 6 (representing an amount from Schedule 1, Line 22). ▪ 1040 Line 7: Schedule 1 is completed if the amount on 1040 Line 7 is not equal to the amount on Line 6 (representing an amount from Schedule 1, Line 36). <p>-----</p> <p>NEW: 2020-21 FAFSA questions #35 (S) and #82 (P) ask if Schedule 1 was (or will be) filed with a 2018 tax return. A note on p. 9 of the FAFSA reads:</p> <p><i>Answer “No” if you (and if married, your spouse) did not file a Schedule 1.</i></p> <p><i>Answer “No” if you (and if married, your spouse) did or will file a Schedule 1 to report only one or more of the following items:</i></p> <ol style="list-style-type: none"> 1. Capital gain (line 13 – may not be a negative value) 2. Unemployment compensation (line 19) 3. Other income to report an Alaska Permanent Fund dividend (line 21 – may not be a negative value) 4. Educator expenses (line 23) 5. IRA deduction (line 32) 6. Student loan interest deduction (line 33) <p><i>Answer “Yes” if you (or if married, your spouse) filed or will file a Schedule 1 and reported additional income or adjustments to income on any lines other than or in addition to the six exceptions listed above.</i></p>	<p>Schedule 1</p>
<p>Owe alternative minimum tax or need to make an excess advance premium tax credit repayment.</p> <ul style="list-style-type: none"> ▪ 1040 Line 11: Schedule 2 is completed if the box for 1040 Line 11b is checked. 	<p>Schedule 2</p>
<p>Can claim a nonrefundable credit other than the child tax credit or the credit for other dependents, such as the foreign tax credit, education credits, or general business credit.</p> <ul style="list-style-type: none"> ▪ 1040 Line 12: Schedule 3 is completed if the box for 1040 Line 12b is checked. 	<p>Schedule 3</p>
<p>Note: Besides Schedules 1, 2, and 3, the school does not need to collect copies of IRS schedules of forms that are attached to the tax return, unless there is conflicting information in the student’s file that needs to be resolved.</p>	

Adapted from: <https://www.irs.gov/pub/irs-pdf/i1040gi.pdf>

Sample 2018 IRS Form 1040 – Page 2

Form 1040 (2018)		Page 2	
1	Wages, salaries, tips, etc. Attach Form(s) W-2. Also attach Form(s) W-2G and 1099-R if tax was withheld.	1	122,179 00
2a	Tax-exempt interest	2b	2,208 00
3a	Qualified dividends	3b	
4a	IRAs, pensions, and annuities	4b	
5a	Social security benefits	5b	
6	Total income. Add lines 1 through 5. Add any amount from Schedule 1, line 22	6	132,497 00
7	Adjusted gross income. If you have no adjustments to income, enter the amount from line 6; otherwise, subtract Schedule 1, line 36, from line 6	7	132,497 00
8	Standard deduction or itemized deductions (from Schedule A)	8	24,000 00
9	Qualified business income deduction (see instructions)	9	
10	Taxable income. Subtract lines 8 and 9 from line 7. If zero or less, enter -0-	10	108,497 00
11	a Tax (see inst.) 15,748 (check if any from: 1 <input type="checkbox"/> Form(s) 8814 2 <input type="checkbox"/> Form 4972 3 <input type="checkbox"/>)	11	15,748 00
12	a Child tax credit/credit for other dependents 4,500	12	4,500 00
13	Subtract line 12 from line 11. If zero or less, enter -0-	13	11,248 00
14	Other taxes. Attach Schedule 4	14	
15	Total tax. Add lines 13 and 14	15	11,248 00
16	Federal income tax withheld from Forms W-2 and 1099	16	11,272 00
17	Refundable credits: a EIC (see inst.) b Sch. 8812 c Form 8863	17	
18	Add lines 16 and 17. These are your total payments	18	11,272 00
19	If line 18 is more than line 15, subtract line 15 from line 18. This is the amount you overpaid	19	24 00
20a	Amount of line 19 you want refunded to you. If Form 8888 is attached, check here	20a	24 00
21	Amount of line 19 you want applied to your 2019 estimated tax	21	
22	Amount you owe. Subtract line 18 from line 15. For details on how to pay, see instructions	22	
23	Estimated tax penalty (see instructions)	23	

Schedule 1 was completed if there is an amount here (additional income)

Schedule 1 was completed if amount on line 7 is not equal to line 6 (adjustments to income)

Standard Deduction for –

- Single or married filing separately, \$12,000
- Married filing jointly or Qualifying widow(er), \$24,000
- Head of household, \$18,000
- If you checked any box under Standard deduction, see instructions.

Refund

Direct deposit? See instructions.

► b Routing number _____ ► c Type: Checking Savings

► d Account number _____

Appendix D

Current Year Transcript Availability

Use the table below to determine the general timeframe when you can request a transcript for a current year Form 1040 return filed on or before the April due date. Availability varies based on the method you used to file your return and whether you have a refund or balance due.

Note: If you made estimated tax payments and/or applied your overpayment from a prior year tax return to your current year tax return, you can request a [tax account transcript](#) to confirm these payments or credits a few weeks after the beginning of the calendar year prior to filing your current year return.

When your original return shows a ...	and you filed <i>electronically</i> , then	and you filed on <i>paper</i> , then
refund amount or no balance due,	allow 2-3 weeks after return submission before you request a transcript.	allow 6-8 weeks after you mailed your return before you request a transcript.
balance due and you paid in full with your return,	allow 2-3 weeks after return submission before you request a transcript.	we process your return in June and you can request a transcript in mid to late June. Note: we process all payments upon receipt.
balance due and you paid in full after submitting the return,	allow 3-4 weeks after full payment before you request a transcript.	
balance due and you didn't pay in full,	we process your return in mid-May and you can request a transcript by late May.	

<https://www.irs.gov/individuals/transcript-availability>

Appendix E

References, Resources and Websites – Tax Returns and Transcripts

U.S. Department of Education

Federal Registers

- Subject: FAFSA Information to be Verified for the 2020-21 Award Year
<https://ifap.ed.gov/fregisters/FR052419.html>

Electronic Announcements

- Subject: 2020-21 Verification Suggested Text Package
<https://ifap.ed.gov/eannouncements/073119VerificationSuggestedTextPackage20202021.html>
- Subject: IRS Announces End to Faxing and Third-Party Mailings of Tax Transcripts
<https://ifap.ed.gov/eannouncements/061219IRSAnnEndFaxThirdPartyMailTaxTranscripts.html>

Student Aid Eligibility Worksheets

- Subject: 2020-21 Free Application for Federal Student Aid (FAFSA®), FAFSA on the Web Worksheet, and the Student Aid Eligibility Worksheet for Question 23
<https://ifap.ed.gov/drugworksheets/2021StudentAidEligibilityWorksheetQ23.html>

2019-20 Federal Student Aid Handbook

- Application and Verification Guide
 - Chapter 2: Filling Out the FAFSA
 - Chapter 4: Verification, Updates, and Corrections<https://ifap.ed.gov/fsahandbook/1920FSAHbkAVG.html>

Program Integrity Questions and Answers - Verification

<https://www2.ed.gov/policy/highered/reg/hearulemaking/2009/verification.html>

Federal Student Aid Glossary and Acronyms

<https://ifap.ed.gov/fsahandbook/attachments/1819FSAHbkAppendixA.pdf>

Internal Revenue Service

- Current Year Transcript Availability
<https://www.irs.gov/individuals/transcript-availability>
- Secure Access: How to Register for Certain Online Self-Help Tools
<https://www.irs.gov/individuals/secure-access-how-to-register-for-certain-online-self-help-tools>
- Transcript Types and Ways to Order Them
<https://www.irs.gov/individuals/tax-return-transcript-types-and-ways-to-order-them>
- Get Transcript FAQs
<https://www.irs.gov/individuals/get-transcript-faqs>
- 4506T-EZ: Short Form Request for Individual Tax Return Transcript
<https://www.irs.gov/pub/irs-pdf/f4506tez.pdf>
- 4506-T: Request for Transcript of Tax Return (transcript and other return information)
<https://www.irs.gov/pub/irs-pdf/f4506t.pdf>
- Here Are Five Facts About the New Form 1040
<https://www.irs.gov/newsroom/here-are-five-facts-about-the-new-form-1040>
- 2018 IRS Publication 17, p. 3: Form 1040 Redesign – Helpful Hints
<https://www.irs.gov/pub/irs-pdf/i1040gi.pdf>