



2024-2025 Acceptable Tax Documents

Student Financial Assistance
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Beginning with the 2024-2025, the Free Application for Federal Student Aid (FAFSA) you and your contributors must provide consent and approval to have the IRS transfer your federal tax information into the FAFSA form using the IRS Direct Data Exchange (DDX). Your contributors must provide consent and approval even if they don't have a Social Security number (SSN), didn't file a tax return, or filed a tax return outside the U.S. If you or your contributors don't provide consent and approval, you won't be eligible for federal student aid.

Even with the implementation of the DDX, there will be situations where the DDX will be unsuccessful in transferring your federal tax information. There will be other situations where it was successful, but the Department of Education (ED) is requiring the institution to verify information that we can only get by collecting certain tax documents.

Special situations that require alternative or additional documentation:

- Student/Parent marital status has changed after filing the 2021 Federal Tax Return:
 - If separated or divorced, submit a **signed** copy of the 2022 Federal Tax Return (**Federal Form 1040 AND applicable schedules**) AND copies of ALL 2022 W-2(s), 1099(s) for parent and ex-spouse (if dependent) or student and ex-spouse (if independent). (Note: If either tax-filer had business income submit Schedule C and/or Schedule K-1 or if either tax-filer had farm income submit Schedule F.)
- Student/Spouse/Parent who did not and will not file a 2022 Federal Tax Return:
 - Complete, sign and submit the 2024-2025 Non-Filing Statement.
 - Submit copies of 2022 W-2s, 1099s and documentation of other year-to-date income and/or benefits.
- Student/Spouse/Parent who amended their 2022 Federal Tax Return:
 - Submit a **signed** copy of the 2022 1040X.
 - Depending on whether or not the DDX was successful, you may also need to submit a **signed** copy of the original 2022 Federal Tax Return (**Federal Form 1040 AND applicable schedules**) along with a **signed** copy of the 2022 1040X.
- Student/Spouse/Parent who filed a 2022 foreign tax return:
 - Submit a **signed** copy of the 2022 foreign tax return.
 - We must also have a translated version converted into USD.
- Student/Spouse/Parent who was a victim of tax administration identity theft:
 - Contact Student Financial Assistance for further guidance.
- Student/Spouse/Parent who was granted a filing extension (beyond the October 15 automatic extension) by the IRS:
 - Contact Student Financial Assistance for further guidance.
- Student/Spouse/Parent who is a non-filer who would file a tax return with a tax authority other than the Internal Revenue Service:
(For example, the student/parent earned income in another country, but was not required to file a tax return in that country or the student/parent resides in another country and either did or did not earn income and was not required to file a tax return in that country.)
 - Submit Verification of Non-Filing from the relevant tax authority on or after October 1, 2023 that verifies that the individual did not file a tax return. This might involve obtaining something directly from the taxing authority, or providing information that may be available on the taxing authority's website.
 - If such a document does not exist, or you are unable to obtain the documentation, contact Student Financial Assistance for further guidance.

IRS Verification of Non-Filing

In some circumstances it may be necessary for you to submit a 2022 Verification of Non-Filing Letter. To request Verification of Non-Filing visit <https://www.irs.gov/individuals/get-transcript>.

IRS Tax Return Transcript

In some circumstances it may be necessary for you to submit a 2022 IRS Tax Return Transcript. To request the IRS Tax Return Transcript, visit <https://www.irs.gov/individuals/get-transcript>.

Wage and Income Transcript

In some circumstances it may be necessary for you to submit a 2022 Wage and Income Transcript. The Wage and Income Transcript, visit <https://www.irs.gov/individuals/get-transcript>.

Write the student's name and USI student ID number on the top of all tax documents submitted to Student Financial Assistance.