



Resolve Tax Filing Conflicts

On September 8, 2004 the Department of Education held a workshop detailing changes in processing regulations. The financial aid office has always been obligated to verify those facts contained in the student's FAFSA application and other documents which seem to conflict. However, in effect since then are specific instructions referring to the financial aid applicant's tax filing status. Examples of this may be: both parents in the same household filing as head of household or students reporting income levels usually taxable who claim to be legal non-filers.

Any apparent conflict must be officially resolved before financial aid funds can be awarded.

Please refer to correct section below to determine what is required for you.

A. If you have not yet filed a 2012 Federal Income Tax Return:

a. Your income levels exceed the limit of legal non-filers.

- i. You must submit a copy of a valid **Federal Tax Return Transcript for 2012**. (We cannot accept a copy of the 1040 form.) You can request a free Transcript online by selecting the link below or copying and pasting it into your browser: <http://www.irs.gov/individuals/article/0,,id=232168,00.html> or by calling (800) 908-9946.

B. If you have filed a 2012 Federal Income Tax Return:

a. There is a conflict in your filing status (ex: you/spouse are married, but filed as single or head of household; parents in same household filing as head of household)

- i. Provide a statement from the IRS (Internal Revenue Service) stating either that you were not required to file for 2012, or that the returns submitted by the student and/or family members are correct.
OR
- ii. Provide a statement by the tax preparer or a tax expert citing the code and explaining in plain language how the code proves the student is not required to file or has filed correctly.
OR
- iii. Amend your/your spouse's 2012 1040 by filing a 1040X with the correct filing status and submit directly to the IRS.