

**2020-2021  
Marital Status/Tax Filing Worksheet for Students  
Instruction Sheet**

**Priority Deadline:**  
Return by **June 1, 2020** for  
maximum aid consideration.

The information you provide will be compared to the Free Application for Federal Student Aid (FAFSA). If there are differences, our office will submit corrections to your FAFSA electronically. This instruction sheet is for you to keep for your records.

In the first section of this form, you, the student, will confirm your marital status and the date this status became effective.

In the next section of the form, you, the student, will clarify your tax filing status. You must submit your 2018 **federal tax return transcript** or a **signed** copy of your 2018 federal tax return (1040), including all schedules, that you filed with the IRS. The remainder of the form collects and clarifies federal tax return information.

Below are a couple of options for requesting a transcript. It may take up to two weeks for IRS income information to be available for electronic IRS tax return filers and six to eight weeks for paper IRS tax return filers.

**IRS Online Tax Return Transcript Request:** <http://www.irs.gov/Individuals/Get-Transcript>

**IRS Automated Phone Transcript Service:** **1-800-908-9946**

**If you and or your spouse (if applicable) are not required by law to file a federal tax return you will need to provide the following:**

1. A copy of IRS Form W-2 for each source of 2018 employment income received or an equivalent document such as the Wage and Income Transcript. Wage and Income Transcripts can be obtained at [www.irs.gov/individuals/get-transcript](http://www.irs.gov/individuals/get-transcript); **and**
2. IRS Verification of 2018 Non-filing Letter dated on or after October 1, 2019.

An IRS Verification of Non-filing Letter can be obtained online using the **IRS Get Transcript service**. If the individual cannot obtain one online, it must be requested by mail. Check box 7 on the **IRS Form 4506-T, Request for Transcript of Tax Return**, and mail it to the IRS. If appropriate, a similar confirmation from another taxation authority (e.g., a U.S. territory or a foreign government) is also acceptable.

For the security of your personal information, the Virginia Tech Office of University Scholarships and Financial Aid does not accept completed forms sent via email. Please return completed forms to us via the document uploader, <https://finaid.vt.edu/documentuploader.html>, or by fax, 540-231-9139.

## 2020-2021 Marital Status/Tax Filing Worksheet for Students

**Priority Deadline:**  
Return by **June 1, 2020** for  
maximum aid consideration.

Student ID Number: \_\_\_\_\_ Email: \_\_\_\_\_

Student's Full  
Legal Name: \_\_\_\_\_  
(Please print clearly)

Last	First	Middle

Your current marital status: ☐ Married/Remarried ☐ Separated ☐ Divorced ☐ Widowed

Effective date of status change \_\_\_\_\_ / \_\_\_\_\_  
month year

Please check the statement below that applies to you.

- ☐ I, the student, filed my 2018 taxes with a status ***other than married filing joint***. Please skip the remaining questions below, **sign** the 2<sup>nd</sup> page of this form, and return it along with a copy of your 2018 IRS Tax Return Transcript.

☐ I, the student, filed my 2018 taxes with a filing status of ***married filing joint***. Please complete, sign, and return this entire form along with a copy of your 2018 IRS Tax Return Transcript and all 2018 W2s.

☐ I, the student **have not and will not file a tax return** for 2018. Note: Those who will not and are not required to file federal income tax returns are required to provide a Letter of Non-filing from the IRS. This can be requested at <https://www.irs.gov/individuals/get-transcript>

Please complete this section **only** if your marital status is something other than **married** and you filed a **married filing joint** federal tax return for 2018.

Tax Return Item Income Section	1040 Line Number	Amount Attributed to the Student
Wages, Salaries, Tips (found on W2 form)	1 + Sch. 1 line 12 + Sch. 1 line 18 + Sch. K-1 Box 14 (code A)	\$
Interest Income	2a	\$
Dividends	3a	\$
Taxable Refunds, Credits, or Offsets	Sch. 1 Line 10	\$
Alimony Received	Sch. 1 Line 11	\$
Business Income/Loss	Sch. 1 Line 12	\$
Capital Gain/Loss	Sch. 1 Line 13	\$
Other Gains	Sch. 1 Line 14	\$
IRA Distributions, Pensions, and Annuities	Line 4a minus Line 4b	\$
Rents, Royalties, Partnerships	Sch. 1 Line 17	\$
Farm Income/Loss	Sch. 1 Line 18	\$
Unemployment Compensation	Sch. 1 Line 19	\$
Social Security Benefits	5a	\$
Other Income	Sch. 1 Line 21	\$



Student ID Number

Student Last Name

Tax Return Item Adjusted Gross Income Section	1040 Line Number	Amount Attributed to the Student
Educator Expense	Sch. 1 Line 23	\$
Business Expenses	Sch. 1 Line 24	\$
Health Savings Account Deduction	Sch. 1 Line 25	\$
Moving Expenses	Sch. 1 Line 26	\$
Deductible part of Self Employment Tax	Sch. 1 Line 27	\$
Self-Employed SEP, SIMPLE plans	Sch. 1 Line 28	\$
Self-Employed Health Insurance Plans	Sch. 1 Line 29	\$
Penalty on Early Withdrawal of Savings	Sch. 1 Line 30	\$
Alimony Paid	Sch. 1 Line 31a	\$
IRA Deduction	Sch. 1 Line 32	\$
Student Loan Interest Deduction	Sch. 1 Line 33	\$

Tax, Credits, and Payments	1040 Line Number	Amount Attributed to the Student
Education Credits from Form 8863, line 19	Sch. 3 Line 50	\$

Asset Information (as of the date you filed the FAFSA)	Student Amount (whole dollars only)	Spouse (if applicable) (whole dollars only)
Balance of Cash, Savings, and Checking	\$	\$
Net worth of Investments ( <i>Value minus debt = current net worth</i> )	\$	\$
Net worth of Business and/or Farm ( <i>Value minus debt = current net worth</i> )	\$	\$

**Additional Comments (optional):** (please use this space to provide any explanation of the figures provided above)

If I purposely give false or misleading information on this worksheet, I may receive a fine, a prison sentence, or both. By signing this information request, I am certifying that all information is complete and correct.

**Student Signature**

**Date**

Electronic signature is not allowed

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