

## 2025-2026 Tax Information Request Instructions

### DID YOU, YOUR SPOUSE, OR PARENT(S) FILE A 2019 FEDERAL TAX RETURN?

#### TAX FILER

Yes, I/we filed taxes for 2023. Please complete one of the two options listed below:

**Option 1:** Log into [www.studentaid.gov](http://www.studentaid.gov) and choose "Make FAFSA Corrections." In the Financial Information section, use the IRS Data Retrieval Tool to transfer your 2021 IRS income information. Your IRS income information is available three weeks after filing electronically and eight weeks after filing a paper return.

- ♦ Option 1 is not available in all circumstances. Please refer to the information below for details on the IRS Data Retrieval Tool. If you are unable to use this option, you should use Option 2.

The **IRS Data Retrieval Tool** allows your **2023** tax information to be imported directly from the IRS into your FAFSA application. If possible, utilize this option. If you have any difficulty using this tool, call FAFSA for support at 800-433-3243.

The **IRS Data Retrieval Tool** will not be available under the following circumstances:

- You have recently electronically filed your taxes (LESS than three weeks ago).
- A joint tax return was filed for 2023 and the student or the student's parents have filed the FAFSA with a marital status of separated, divorced or widowed.
- If the tax filer is married to someone other than the individual included on the 2023 joint tax return.
- If the parent or student was not married in 2023 but is married at the time the FAFSA is filed. The current spouse's income must be reported on the FAFSA.
- If the parents or the student is married but filed tax returns separately.
- If an amended tax return was filed.
- If there is conflicting information on the FAFSA (incorrect tax filing status, tax return status not "Already complete" ...)

#### FAFSA-IRS Data Retrieval Step by Step

1. Go to [www.studentaid.gov](http://www.studentaid.gov).
2. Log in using student's first and last names, social security number and a date of birth.
3. Click "Next"
4. Select "Make FAFSA Corrections".
5. Create a password
6. Enter your FAFSA PIN
7. Click on a tab labeled "Financial Information".
8. Change your answer to a question "For 2023, have you completed your IRS income tax return or another tax return" from "Will File" to "Already Completed" and follow the steps below.
9. Dependent students will need to follow the steps separately for their own section and for a section for parents.

**Option 2:** Request your 2023 Federal Tax Return Transcript (not a tax account transcript) from the IRS and provide it to the Office of Financial Aid. To access and print an official IRS Tax Transcript go to [www.irs.gov](http://www.irs.gov) and under the "Tools" menu select "Get Transcript for My Tax Returns". At this website you will have the option to view and print your 2021 Federal Tax Return Transcript or you may request a paper copy mailed to you within 5-10 business days. Please note that the website is set up with a high degree of security to maintain your private information. Please follow each step and provide accurate answers when requested. You may also call 800-908-9946 to make the request for your tax information.

- ♦ If you choose option 2, please submit a copy of the Federal Tax Return Transcript (s) to the Office of Financial Aid.
- ♦ If you/your parents filing status is married filing separately, you must provide Federal Tax Return Transcripts for both you/your spouse/your parents.

- ♦ If you filed or plan to file an amended tax form, you will need to submit:
  - 1) a signed copy of your 2023 tax form (1040) or the Federal Tax Return Transcript
  - and
  - 2) a signed amended form 1040X or the Federal Tax Account Transcript

#### NON-TAX FILER

No, I/we did not file taxes for 2023. Please see federal income filing requirements below.

Please complete, sign and return a copy of the Student and/or Parent 2025-2026 Non-Tax Filer Statement and provide copies of all W-2s, per non-tax filer, for all sources of income earned in 2023. The Non-Tax Filer Statement form can be found at: <https://www.hood.edu/admission-aid/financial-aid/forms-resources>. If you do not have your W-2s, you may request a Wage and Income transcript from the IRS.

**Federal regulations require documentation from the IRS dated on or after October 1, 2022 that indicates a 2023 income tax return was not filed with the IRS. See the reverse side of the 2025-2026 Independent Student or Parent Non-Tax Filer Statement form for instructions in obtaining this documentation.**

2023 FEDERAL INCOME TAX FILING REQUIREMENTS				
<b>This information is from the 2021 IRS 1040 Instruction Booklets (see <a href="http://www.irs.gov">www.irs.gov</a>)</b> <b>Amounts listed are for people under the age of 65; if you are over 65, please refer to the IRS instruction booklets.</b>	<b>For most people, a tax return must be filed with the Internal Revenue Service (IRS) if their 2021 income was at least:</b>			
	Single dependent student	\$12,550 (earned income)	Married, filing separately	\$5 (gross income)
	Single, if claiming self	\$12,550 (gross income)	Head of household	\$18,800 (gross income)
	Married, filing joint return	\$25,100 (gross income)	Qualifying widow(er)	\$25,100 (gross income)