



Office of Financial Aid & Scholarships

2023-2024 STUDENT TAX INFORMATION

Your 2023-2024 application for federal student aid has been selected for verification of 2021 tax information. Please submit all required documentation listed below for yourself and/or your spouse. Failure to submit all required documents will result in a delay in the processing of your aid. If you were married on the date the FAFSA was filed, tax documents for both you and your spouse are needed. **The student's name and LSU ID should be listed on all documents submitted.**

SUBMIT 2021 TAX RETURN OR TAX RETURN TRANSCRIPT

- ◆ Tax Transcript
 - May be requested online at irs.gov and selecting “Get Your Tax Record” or by calling 1-800-908-9946. Make sure to request the “Tax Return Transcript” and **NOT** the “Account Transcript”.
 - To use the Get Transcript Online tool you will need to create an ID.me account with the IRS. You can use either a self-service process that requires a photo of a government ID and selfie, or a live call with an ID.me video chat agent that doesn't require biometric data.
- ◆ Tax Return
 - Submit a signed (with physical signature) copy of the 1040 filed with the IRS
- ◆ If an amended tax return was filed, submit a **signed** copy of the 1040X “Amended U.S. Individual Income Tax Return” **and** a 2021 IRS Tax Return/Transcript.
- ◆ If an individual filed or will file a 2021 income tax return with Puerto Rico, another U.S. territory, or with a foreign country, must provide:
 - A signed copy of the 2021 income tax return(s); **or**
 - A transcript obtained from a government of a U.S. territory or commonwealth; or a foreign central government that includes all of the tax filer's income and tax information required to be verified for tax year 2021.

SUBMIT ALL 2021 W2s

- ◆ Amount(s) reported in Box 1 of W-2 forms should total ‘Wages, Salaries, Tips, Etc.’ reported on the Tax Return/Transcript. If amount(s) from forms other than a W-2 are included on this line, please submit those additional documents as well.

SUBMIT 2021 TAX SCHEDULES

- **Schedule K-1 Form 1065, if applicable**
 - This form is only required for tax filers who have Partnership Income reported on Schedule E of the 1040 filed
- ◆ **If submitting a 1040, the following schedules must be submitted, if filed**
 - Schedule 1
 - Schedule 2
 - Schedule 3
 - Schedule C
 - Schedule F