



## Lander University Financial Aid Office

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20PTTR

### Parent(s) 2020 Federal Tax Returns (Signed) or IRS Transcript Instructions

The instructions below apply to each parent/step-parent included in the household on the Free Application for Federal Student Aid (FAFSA). What documents you need to submit depends upon the parent(s) 2020 federal tax filing status listed below.

- If the parent(s)/step-parent filed Single, Head of Household, Widowed, Married Filing Joint Return**
  - Use IRS Retrieval option on the FAFSA at [www.fafsa.gov](http://www.fafsa.gov) to import tax information. (Copies of tax transcripts will not be needed if the transfer is successful.)
  - **If parents filed or are required to file but was unable to use the IRS Data Retrieval via the FAFSA, submit a signed copy of the 2020 Federal Tax Return and all Schedules.**
- If the parent(s)/step-parent filed Married Filing Separate Returns**
  - A **signed** copy of the 2020 Federal Tax Return or IRS Tax Transcripts for each filer. **List the student's name and Lander ID on each page.** (See **How to request a 2020 IRS Tax Return Transcript** instructions below.)
- If the parent(s)/step-parent filed an amended return (20PTAA)**
  - Complete and submit the **Parent(s) 2020 Federal Amended Returns Form** available at [https://www.lander.edu/sites/default/files/Documents/Financial\\_Aid/2022-23%20Parent%20Federal%20Amended%20Return.pdf](https://www.lander.edu/sites/default/files/Documents/Financial_Aid/2022-23%20Parent%20Federal%20Amended%20Return.pdf)
- If the parent(s)/step-parent did not file and was not required to file (20PTNF)**
  - Complete and submit the **Parent(s) 2020 Federal Non-Filer Confirmation Form** available at [https://www.lander.edu/sites/default/files/Documents/Financial\\_Aid/2022-23%20Federal%20Non-Filer%20Confirm.pdf](https://www.lander.edu/sites/default/files/Documents/Financial_Aid/2022-23%20Federal%20Non-Filer%20Confirm.pdf)
  - Verification of Non-filing from the IRS (confirmation that the tax return has not yet been filed) from the IRS dated on or after October 1, 2021. **You can request a copy on-line at: <https://www.irs.gov/individuals/tax-return-transcript-types-and-ways-to-order-them> using the 4506-T form. **List the student's name and Lander ID on each page.****
- If the parent(s) was/were victim(s) of IRS tax-related identity theft (20IDTP)**
  - Complete and submit the **Parent(s) 2020 Federal IRS Identity Theft Form** available at [https://www.lander.edu/sites/default/files/Documents/Financial\\_Aid/2022-23%20Parent%20Federal%20IRS%20ID%20Theft.pdf](https://www.lander.edu/sites/default/files/Documents/Financial_Aid/2022-23%20Parent%20Federal%20IRS%20ID%20Theft.pdf)

(These and other forms can be found on our webpage at [www.lander.edu/finaid/forms](http://www.lander.edu/finaid/forms) .)

#### How to request a 2020 IRS Tax Return Transcript:

- Use the IRS Retrieval option on the FAFSA at. (The simplest and fastest method for most people.)
- **Get Transcript ONLINE** – Go to [www.irs.gov](http://www.irs.gov), click “Get Your Tax Record”. Click “Get Transcript ONLINE.” Make sure to request the “IRS Tax Return Transcript” and **NOT** the “IRS Tax Account Transcript.”
- **Get Transcript by MAIL** – Go to [www.irs.gov](http://www.irs.gov), click “Get Your Tax Record”. Click “Get Transcript by MAIL.” Make sure to request the “IRS Tax Return Transcript” and **NOT** the “IRS Tax Account Transcript.”
- **Automated Telephone Request** – 1-800-908-9946
- **Paper Request Form** – IRS Form 4506T-EZ or IRS Form 4506-T at <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>