



Office of Enrollment Management

SPOUSE 2020 FEDERAL TAX RETURN/TRANSCRIPT REQUEST

Your 2022-2023 application for federal student aid has been selected for verification of 2020 tax information. Please submit all required documentation listed below for your spouse. Failure to submit all required documents will result in a delay in the processing of your aid. **The student's name and LSU ID should be listed on all documents submitted.**

SUBMIT 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, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- ♦ 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 2020 IRS Tax Return/Transcript.
- ♦ If an individual filed or will file a 2020 income tax return with Puerto Rico, another U.S. territory, or with a foreign country, must provide:
 - A signed copy of the 2020 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 2020

SUBMIT ALL 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 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