

2020-2021 Income Statement – Student/Spouse



Student Financial Aid Office
11400 Robinwood Drive
Hagerstown, MD 21742

Phone: 240-500-2473
finaid@hagerstowncc.edu
FAX: 301-791-9165

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Student Name _____ HCC ID# _____
Last First MI

Section One: Select if you are a dependent or independent student:

Dependent –Go to **Section Two**.

Independent –Go to **Section Three**.

Section Two: Dependent Student

Select **ONE** option below that describes your 2018 income as stated on the 2020-2021 FAFSA:

1. You did **not** work/did **not** receive unemployment and did not/will not file taxes in 2018. **Go to Section Four once this option is checked.**
2. You worked or received unemployment in 2018, **BUT** did not receive income over the IRS filing limits AND DID NOT/WILL NOT FILE. List all earned income in the boxes below. Submit all W2s/1099's for 2018 WITH THIS FORM. **Go to Section Four once this section is completed.**

Did you receive income **NOT** reported on a W2? Yes No

If yes, list that income below with the sources and amounts of income earned. Use separate sheet if needed.

Source of income or Employer Name on W2	Earned Income
	\$
	\$

3. You imported tax information directly into the FAFSA by using the IRS Data Retrieval Tool. If you did not use this option and would like to, please follow the directions below:

DIRECTIONS: To use the IRS Data Retrieval Tool at Studentaid.gov

- Under Apply for Aid near the top, click "Complete the FAFSA Form"
- Log In using the Student's User Name and Password, make updates to the 2020-2021 FAFSA only
- Under Student Financials, use the "Link to IRS" to transfer tax information into the FAFSA
- Sign and Submit the FAFSA

Sign and date Section Four and submit this form to HCC Student Financial Aid Office after waiting one week. This will allow time for the update to be received.

4. You are submitting IRS Tax Return Transcripts **OR** Signed IRS Tax Returns **and all applicable schedules (Schedules 1, 2, 3)** for the 2018 tax year. **Go to Section Four after completed.**

DIRECTIONS: To order a 2018 tax return transcript

Get Transcript ONLINE – Go to 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." **Online may be the only option. Check irs.gov.**

Get Transcript by MAIL – Go to www.irs.gov, "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."

Section Three: Independent Student

Select **ONE** option below that describes your 2018 income as stated on the 2020-2021 FAFSA:

1. You (and/or your spouse) did not work and did not receive unemployment in 2018. If you check this option, a **Verification of Non-filing letter or a Tax Return Transcript (it will say you did not file) from the IRS is required.** Please follow the Directions below. **Go to Section Four once this option is completed.**

DIRECTIONS: To order a Non-filing Letter or Tax Return Transcript (it will say that you did not file)

Get Transcript ONLINE – Go to www.irs.gov, click "Get Your Tax Record", click "Get Transcript Online" or "Get Transcript by Mail." **Online may be the only option. Check irs.gov.**

Get Transcript by MAIL – Can be obtained from the IRS using Form 4506-T and checking Box 7. Be sure to list Year or period requested as 12/31/2018. This takes 5 to 10 days.

If you attempted to obtain a Verification of Non-Filing Letter from the IRS but you were unable to obtain the required documentation, check here

2. You (and/or your spouse) worked or received unemployment in 2018, BUT did not receive income over the IRS filing limits AND DID NOT/WILL NOT FILE. List all earned income in the boxes below. Submit all W2s/1099's for 2018 WITH THIS FORM. If you check this option, a **Verification of Non-Filing letter from the IRS is required.** Please follow the Directions below. **Go to Section Four once this option is completed.**

DIRECTIONS: To order a Non-filing Letter or Tax Return Transcript (it will say that you did not file)

Get Transcript ONLINE – Go to www.irs.gov, click "Get Your Tax Record", click "Get Transcript Online" or "Get Transcript by Mail." **Online may be only option. Check irs.gov.**

Get Transcript by MAIL – Can be obtained from the IRS using Form 4506-T and checking Box 7. Be sure to list Year or period requested as 12/31/2018. This takes 5 to 10 days.

If you attempted to obtain a Verification of Non-Filing Letter from the IRS but you were unable to obtain the required documentation, check here

Did you receive income **NOT** reported on a W2? Yes No

If yes, list that income with the sources and amounts of income earned. Use separate sheet if needed.

Source of income or Employer Name on W2	Earned Income
	\$

3. You (and/or your spouse) imported tax information directly into the FAFSA by using the IRS Data Retrieval Tool. If you did not use this option and would like to, please follow the directions below:

DIRECTIONS: To use the IRS Data Retrieval Tool at Studentaid.gov

1. Under Apply for Aid near the top, use "Complete the FAFSA Form"
2. Log In and make updates to the 2020-2021 FAFSA only
3. Under Student Financials, use the "Link to IRS" to transfer tax information into the FAFSA
4. Sign and Submit the FAFSA

4. You (and/or your spouse) are submitting IRS Tax Return Transcripts **OR** Signed IRS Tax Returns **and all applicable schedules (Schedules 1, 2, 3)** for the 2018 tax year. **Go to Section Four after completed.**

DIRECTIONS: To order a 2018 tax return transcript

Get Transcript ONLINE – Go to www.irs.gov, click "Get Your Tax Record", then "Get Transcript ONLINE." Request the return - do **NOT** request the "Tax Account Transcript." **Online may be the only option.**

Get Transcript by MAIL – Go to www.irs.gov, "Get Your Tax Record," then "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."

Section Four: Sign

By Signing this form you are certifying that all the information reported on it is complete and correct.

Student Signature

Date

Office Use Only: IRS DRT CODE _____	Initials _____	Income listed? Yes No ___
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