



# Submitting 2023 Federal Tax Information

## How do I submit documents?

- If necessary, submit all documentation either in person to the ETSU Office of Financial Aid and Scholarships located at Burgin Dossett Room 105, by mail to P.O. Box 70722, Johnson City, TN 37614, or by fax to (423) 439-5855.

To prevent processing delays, all

- requested forms must be fully completed. Sign all areas where a signature is requested.

IRS Tax Return Transcripts are two-

- sided pages. Send all pages of the document and have the student's name and ID number on all documents.



## What are my options for submitting tax information?

Guidance for those who filed a 2023 IRS Tax Return

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### Option 1

Use the IRS Direct Data Transfer

- Electronically transfer federal tax return information by logging in at StudentAid.gov to provide consent for data to be automatically pulled into the FAFSA.

### Option 2

Submit a signed copy of your 2023 Federal Tax Return

- Submit copies of 2023 Form 1040 pages 1 & 2 (with real signatures) along with Schedules 1, 2, 3, C, and F, if applicable. Typed signatures are not acceptable.

### Option 3

Obtain and submit a Free Tax Return Transcript

- If unable to use options 1 & 2, see the next page to learn how to obtain a Free Tax Return Transcript.



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## Obtaining a Free Tax Return Transcript

- **Request at the IRS website [www.irs.gov](http://www.irs.gov) by selecting "Get Your Tax Record" which brings you to the page where you can select one of these options:**
  - **Get Transcript ONLINE** - Sign in or create a new account. Request a "Tax Return Transcript" (NOT Account Transcript) for Tax Year "2023."
  - **Get Transcript by MAIL** - Joint filers must provide information for the first person (primary taxpayer) listed on the tax return; enter SSN, date of birth, and address (shown on your latest tax return); click "continue"; for Type of Transcript select "Tax Return Transcript" (NOT Account Transcript) for Tax Year "2023."
- **Request by calling the IRS Transcript Order Line at 1-800-908-9946**
  - Joint filers must provide information for the first person (primary taxpayer) listed on the tax return. You will be given an online option but continue to hold. You will be prompted to enter tax filer's SSN, address; select "Option 2" to request an IRS Tax Return Transcript (NOT Account Transcript) and then enter "2023."
- **Paper Request Form—Download IRS Form 4506T-EZ (Not 4506-T) at [irs.gov/pub/irs-pdf/f4506tez.pdf](http://irs.gov/pub/irs-pdf/f4506tez.pdf)**
  - A joint tax filer listed second (secondary taxpayer) on the return is unable to obtain a "Tax Return Transcript" by mail or phone. Use Get Transcript Online or Form 4506-T. Instructions can be found online.
  - Note: The IRS cannot send the Tax Return Transcript to the university. It will be mailed to you.

## More Tax Information Tips:

- **IRS Matching Address Problem:**
  - The address must be an exact match to the 2023 Federal Income Tax Return. In some cases, an IRS Form 8822 Change of Address is required.
- **IRS Tax-Related Identity Theft Issue:**
  - A special transcript is available to tax filers who have been a victim of IRS identity theft. Contact the Identity Protection Specialized Unit (IPSU) at 1-800-908-4490 or by visiting [www.irs.gov/identity-theft-central](http://www.irs.gov/identity-theft-central) to request a mailed copy of a 2023 Tax Return DataBase View Transcript (TRDBV). The tax filer must also submit a signed and dated statement indicating that he or she was a victim of IRS tax-related identity theft, and that the IRS is aware of the incident.
- **Required Documentation for Submitting Income Information for Residents of Foreign Countries:**
  - Tax filers must submit a copy of the W-2, Wage and Tax Statement, or equivalent document from each employer for the 2023 tax year.
  - Additionally, a transcript (only if it can be obtained at no cost) from the relevant taxing authority listing 2023 tax account information is required. This document must include an English translation and monetary conversion rate as of the date of FAFSA filing.
    - If a free transcript is not available, documentation that the tax authority charges a fee to obtain that information is required. Also, a signed copy of the original tax return including an English translation and the monetary conversion rate as of the date of FAFSA filing is required along with a copy of the W-2, Wage and Tax Statement, or equivalent document from each employer for the 2023 tax year.
- **Additional Information:**
  - For verification that IRS or pension distribution was rolled over, submit 2023 IRS 1099-R Form(s).
  - Married tax filers who file separate returns must submit a Tax Return Transcript for each filer or a signed copy of the 2023 Form 1040 (pages 1 and 2) along with schedules 1, 2, 3, C, and F, if applicable, for each filer.