



CALIFORNIA STATE UNIVERSITY  
**FULLERTON**

Return to: Office of Financial Aid  
P.O. Box 6804 UH-146  
Fullerton, CA 92834-6804

Enter Student's  
CWID Here:

**PARENT 2014 TAX FILING STATEMENT (2015-2016)**

The following parental information is required to complete your student's financial aid application. Please refer to the second page and review the definition of "Parent" for the purpose of completing this form. In order for us to verify your (and your spouse's) 2014 income and wages information, you must provide the information below. **We strongly encourage you to utilize the IRS Data Retrieval functionality on the FAFSA –either in the initial filing, or by submitting a correction at [www.fafsa.gov](http://www.fafsa.gov), as this could greatly expedite the review of your student's financial aid eligibility.** For more information about how to utilize the IRS Data Retrieval Tool or how to request a 2014 IRS Tax Transcript, please see the second page of this document.

**Instructions for completing this form:** Based on whether or not you (and your spouse) have already completed your 2014 U.S. Federal Tax Return, complete *either* Section A *OR* Section B. **\*All individuals must complete Section C.**

*Incomplete documents will not be returned. They will be disposed of in a secure manner, per university policy. This will delay processing.*

**Section A: I (and my spouse) have already completed the 2014 U.S. Federal Tax Return. Check one box below.**

- I/we have filed a 2014 U.S. Federal Income Tax Return (1040, 1040A, 1040EZ).** Submit a Tax Return Transcript or utilize the IRS Data Retrieval functionality on the FAFSA at [www.fafsa.gov](http://www.fafsa.gov). **Please note:** if your IRS filing status was "married filing separately" OR your FAFSA marital status is "unmarried and both parents living together", a 2014 IRS Tax Return Transcripts for BOTH parents must be submitted to our office along with this form.
- My filing status was Married Filing Jointly; however I have since separated.** Submit your 2014 IRS Tax Return Transcript AND copies of all W2s, as they are required to determine your portion of earned income.

**Section B: I (nor my spouse) have not completed the 2014 U.S. Federal Tax Return. Check one box below.**

- I/we did not have any income earned from work in 2014.** Must provide information about the source of support for your household in Section C.
- I/we certify that federal law does not require me (or my spouse) to file a 2014 U.S. Federal Income Tax Return.** Copies of W2s or 1099s for both you (and your spouse) OR Documentation of other resources received in 2014 that were utilized to support your household must be provided. For more information about the federal laws surrounding who **MUST** file, please see the section on the second page titled "Who is Required to File a U.S. Federal Income Tax Return?"
- I/we have filed a Tax Extension.** Submit form 4868, all 2014 W2s, a signed statement with estimated 2014 income and/or business income amount(s) (if applicable), and a signed copy of 2013 federal tax return form (1040, 1040A, or 1040EZ).
- I/we have filed a 2014 Foreign Tax Return.** Submit a signed and translated copy of your foreign tax return, which shows the 2014 Adjusted Gross Income (AGI) and Taxes Paid.

**\*Section C (All individuals must complete this section): Income & Other Support**

**Instructions:** Complete ALL items listed below. **ENTER ZEROS** if you did not receive funding from the agency or source listed. **Report the full amount received in the calendar year 2014, January 1-December 31, 2014. Do not report monthly amounts.**

- Child support received for any of your children. Don't include foster care or adoption payments. \$ \_\_\_\_\_
- Housing, food and other living allowances paid to military, clergy and others (including cash payments and cash value of benefits). Don't include the value of on-base military housing or the value of a basic military allowance for housing. \$ \_\_\_\_\_
- Veterans noneducation benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances \$ \_\_\_\_\_
- Other untaxed income not reported, such as workers' compensation, disability, etc. Don't include student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce investment Act education benefits, on-base military housing or a military housing allowance, combat pay (if your parents are not tax filers), benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels. Source: \_\_\_\_\_

**CERTIFICATION:**

By signing this form, I certify that all of the information reported on this form and any attachments hereto is true, complete and accurate. I agree to provide additional proof of the information reported, if requested to do so. **\*Only one parent signature is required. Signing parent must be a parent that provided information on the FAFSA.**

\*Parent Signature: \_\_\_\_\_

Date \_\_\_\_\_

Print Student's Name: \_\_\_\_\_

CWID \_\_\_\_\_

**\* Warning:** If you give false or misleading information on documents submitted to the Office of Financial Aid, you may be fined, be sentenced to jail or both.

## DEFINITION OF “PARENT” FOR THE PURPOSE OF COMPLETING THIS FORM:

For the FAFSA, “parent” refers to your biological and/ or adoptive parents (including your step-parent if that person is currently married to your “parent”).

The following are **NOT considered to be a “legal parent” for the FAFSA:**

- Grandparents, foster parents, legal guardians, aunts and uncles are NOT considered parents unless they have legally adopted you.
- Any person who is not married to your parent and who is not a legal or biological parent.

*If your parent’s FAFSA marital status is “married,” or “unmarried and both parents living together,” then both their information must be provided.*

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## USING IRS DATA THE RETRIEVAL TOOL (DRT)

The IRS Data Retrieval Tool can be used when completing the FAFSA to directly pull parental tax information from the IRS into the FAFSA. This will expedite the application process. In most cases, no further documentation is needed by our office to verify income if the transfer of data using the IRS DRT is successful. Below is a list of circumstances that would prevent a family from being able to utilize the IRS DRT when completing the FAFSA:

- It was not indicated on the FAFSA that the tax return was completed.
- A marriage date listed on the FAFSA was January 2014 or later.
- The first three digits of the SSN are 666.
- The tax return was amended.
- A Puerto Rican or foreign tax return was filed.
- A married person filed the tax return either as ‘head of household’ or ‘married but filing a separate return’.
- Neither married parent entered a valid SSN.
- A non-married parent or both married parents entered all zeroes for the SSN.
- Taxes are owed to the government.

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## HOW TO REQUEST AN IRS TAX TRANSCRIPT

The IRS has now made downloading an electronic copy of your tax transcript an option for those individuals with a valid Social Security Number (SSN) or Individual Taxpayer ID Number (ITIN). You can begin this process by navigating to <http://www.irs.gov/transcript>. The website will require authentication of the primary tax filer’s identity. You will be asked to provide the following information that should correspond with what the IRS has on file for the primary tax filer: SSN, ITIN, date of birth, street address, and zip code. Once the authentication is complete, take the following steps:

- Choose the “Get Transcript ONLINE” option. You must sign in or sign up to create an account.
- Select the reason you are requesting a transcript as “Higher Education/Student Aid”.
- In the “Return Transcript” Box, choose the transcript for the appropriate tax year. Your IRS Tax Return Transcript should then open on-screen as a pdf document.
- Print the transcript and write the student’s name and Cal State Fullerton CWID at the top of page, attach all printed pages of the Tax return Transcript to the Tax Filing Statement form, and return them to the Office of Financial Aid (UH 146).

If you are a taxpayer but are unable to access your Tax Return Transcript online, you will have to order a paper tax transcript to be sent to you via regular post. You can do so by:

- Navigating to the IRS website <http://www.irs.gov> and clicking on “Get Transcript of Your Tax Records”, OR
- Calling 1-800-908-9946 to request an IRS Tax Return Transcript for the appropriate year.

**PLEASE NOTE:** Turnaround time for the above options can take up to 10 business days depending on IRS peak processing times. Additionally, tax transcripts requested online or by telephone **CANNOT** be sent directly to a third party by the IRS.

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## WHO IS REQUIRED TO FILE A U.S. FEDERAL INCOME TAX RETURN?

You must file a U.S. Federal Income Tax Return, AND follow the instructions in Section A of the previous page, if your gross income was at least:

- \$10,150 if single
- \$13,050 if head of household
- \$20,300 if married, filing jointly
- \$3,950 if married, filing separately
- Or, you had earnings from self-employment of any amount