

2023-2024 Form U

Spouse Tax Transcript for 2021

Your spouse's 2023-2024 FAFSA was selected for review in a process called "Verification." In this process, the financial aid office will compare the information reported on your FAFSA with the information on this form and any other required documentation. The law states that we have the right to ask for confirmation of this information before awarding federal student aid. If there are differences between the information reported on your FAFSA and the documents submitted to our office, we will make the necessary corrections. We retain the right to request additional information as needed to complete your file. If you have any questions about the verification process, contact the Financial Aid Office as soon as possible to avoid a delay in processing your request for financial aid.

****Your spouse's eligibility for financial aid cannot be determined until the verification process is complete.****

The income tax documents that we accept are based on policy put forth by the U.S. Department of Education. We can only accept a **2021 IRS Tax Return Transcript** or a copy of your **2021 Tax Return with the corresponding schedule** signed by you or with the necessary tax preparer information as documentation of tax information. There are **three ways to meet this requirement**. Your spouse should do one of the following.

1. Log into the FAFSA and use the Data Retrieval Tool (DRT) or

2. Submit a Tax Return Transcript or

Retrieve Online: Go to www.irs.gov/transcript and request the transcript online by selecting "Get Transcript Online" or by mail by selecting "Get Transcript by Mail. Follow the on-screen instructions. **To register and use this service you need:** *your personal account number from credit card, mortgage, home equity loan, home equity line of credit or car loan and a mobile phone linked to your name (for faster registration) or ability to receive an activation code by mail.*

Retrieve By Phone: Call the IRS Transcript Order Line at **1-800-908-9946**. Follow voice prompts to order 'Tax Return Transcript' for year '2021.'

Retrieve In Person: Set up an appointment with your nearest IRS facility by calling **844-545-5640**

3. Submit a Tax Return (1040 and corresponding Schedules 1, 2, and/or 3)

If you submit a copy of your 2021 Tax Return, it **MUST** contain **either your signature or the necessary tax preparer information (SSN, EIN, or PTIN)**. It must be signed, stamped, typed, or printed with the name and address of the preparer of the return.

Individuals Who Filed an Amended IRS Tax Return

If an individual filed an amended IRS income tax return for tax year 2021, provide both of the following:

- A signed copy of the original 2021 IRS income tax return that was filed with the IRS or a **2021 IRS Tax Return Transcript** (signature not required) for the 2021 tax year; **AND**
- A signed copy of the 2021 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

Individuals Who Were Victims of IRS Identity Theft

- A victim of IRS identity theft who has been unable to obtain a **2021 IRS Tax Return Transcript** or use the IRS DRT. Must provide a signed copy of the 2021 paper IRS income tax return that was filed with the IRS and a signed copy of IRS Form 14039 "Identity Theft Affidavit" that was submitted to the IRS.

Individuals Who Filed Non-IRS Income Return

- If an individual filed or will file a 2021 income tax return with Puerto Rico, another U.S. territory (e.g., Guam, American Samoa, the U.S. Virgin Islands, the Northern Marianas Islands), or with a foreign country, provide a signed copy of that 2021 income tax return(s).

MAIL OR FAX THE COMPLETED FORM AND SUPPORTING DOCUMENTATION TO:

Lenoir Community College • Office of Financial Aid
P.O. Box 188 • Kinston, NC 28502
Fax: 252-233-6896 • Email: finaid@lenoircc.edu