

2023-2024



Tax Transcript Cover Sheet – Student

Student's Name (PRINT): _____ Phone: (____) _____
HCC ID: _____ Date of Birth: ____/____/____ Home Campus: _____
(9-digit number required) (Primary location of attendance)

Your financial aid application has been selected for verification. HCC must verify the data you reported on your Free Application for Federal Student Aid (FAFSA). Verification of data must be completed prior to HCC awarding or disbursing financial aid funds. Please provide copies of the student's and, if applicable, spouse's IRS Tax Return or Transcript(s) for tax year 2021. If there are differences between taxes and the FAFSA reported data, HCC will make the corrections electronically.

Check the appropriate tax information being provided:

__ TAX TRANSCRIPT(s): Please note that we can accept tax returns or tax transcripts for 2021. To expedite your application process, you can: (1) Login to your FAFSA application and you can utilize the IRS Data Retrieval Tool. If this tool is used and the data that is retrieved from the IRS remains unchanged, you will be waived from having to submit the IRS Tax Transcript OR (2) You can download their IRS Tax Transcript by logging onto <http://www.irs.gov/Individuals/Get-Transcript> OR (3) Request tax transcript via automated phone request by calling 1-800-908-9946.

__ IDENTITY THEFT VICTIM: Provide a signed statement and form TRDBV. A student/spouse who is unable to request an IRS Tax Transcript because of identity theft must call the IRS's Identity Protection Specialized Unit (IPSU) at 1-800-908-4490. Once the IPSU authenticates the individual's identity, the student/spouse can request the IRS provide a paper copy of an alternative document unique to identity theft issues (Tax return Data Base View - TRDBV). If the TRDBV form is submitted in place of the IRS Tax Transcript/Return, the student/spouse must also provide a dated signed statement indicating that they were victims of tax-related identity theft and that the IRS has been made aware of it.

__ TAX EXTENSION FORM AND W-2 FORMS: For students granted a tax filing extension beyond the automatic 6-month extension, submit a copy of IRS approval of extension. The student/spouse must also provide a copy of all their W-2 forms or, if they are self-employed, a signed statement with the amount of their AGI and their U.S. income taxes paid.

__ AMENDED TAX RETURN: Students who file an amended return (IRS Form 1040X) cannot use the IRS DRT. Instead, must provide the following documents to complete verification:

- A signed copy of the 1040X form that was filed.
- The Original IRS Tax Return Transcript (that will only include information from the original tax return).
- An IRS Account Transcript that reflects the correct tax filing status and adjusted gross income on the 1040X.

Submit the requested IRS tax transcripts and/or income documentation by attaching ALL pages to this form. The tax transcript is usually submitted printed on both sides of the paper – be sure to attach both sides.

DOWNLOAD BOX

2023-2024



Certification

By signing below, I/we acknowledge and confirm that the above and attached information is complete and correct. Purposely giving false or misleading information may result in federal fines, jail sentence, or both.

Student Signature: _____

Date: _____