



Guide to Understanding Tax Documents

The Barnard College Financial Aid Office requests tax documents to complete each student’s financial aid application. The tax documents requested depend on each family’s tax filing status. Our office will add all required documents to the Financial Aid Checklist based on the family’s tax filing information reported on the CSS Profile and FAFSA.

The following documents may be requested from families who filed a U.S. Tax Return:	
Parent or Student Tax Return	This document refers to the student or parent Federal U.S. Individual Income Tax Return (IRS form 1040). When we request this form we are requesting a full copy of the tax return, which includes all tax schedules and federal tax statements. Copies of state tax returns are generally not required unless you live in New York (see below).
Parent or Student Amended Tax Return	This document refers to a student or parent’s corrected tax return, known as the 1040X Amended U.S. Individual Income Tax Return. This tax return corrects errors to the original tax return that the taxpayer filed with the IRS. This document may be requested if the FAFSA indicates that an Amended Tax Return has been filed or if there is an indication on the original tax return that corrections were or need to be made to the tax return.
Parent or Student U.S. Territories Tax Return	This tax return is requested from individuals who filed a tax return in the U.S. Territories of Guam, the Commonwealth of the Northern Mariana Islands (CNMI), American Samoa, the U.S. Virgin Islands or Puerto Rico.
Parent New York State Tax Return (For New York State residents only)	A New York State Resident Income Tax Return (Form IT-201) is requested from parents who reside full-time in New York State.
Documentation of Foreign Income may be requested if a family earned foreign income or resides outside of the U.S. Examples include:	
The country's tax return	Please include a full copy of the foreign tax return along with an English translation using \$USD.
A signed statement from your parents' employer(s)	This letter must be on the company's letterhead and should indicate annual wages, bonuses, and benefits. The statement should also indicate if the income is gross income (before taxes, in which case we need to know the taxes paid) or net of taxes.
The following document(s) may be requested if a student or parent did not file a tax return:	
Parent or Student Tax Non-Filer Form	This form certifies that a student or parent did not file and was not required to file a tax return in the requested tax year. This form is added to the Financial Aid Checklist if the FAFSA or CSS Profile report that no tax return was filed.
W-2 Forms	
W-2 Forms	W-2 forms are collected from all students and parents who received W-2 forms from their employers. Our office requires copies of all original W-2 forms as issued by the employer. We do not accept W-2 summaries from the federal or state tax returns. If a student or parent reports earned income and doesn’t receive a W-2 form, additional documentation may be requested.