



Lander University Financial Aid Office

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VERIFICATION: IRS DATA RETRIEVAL INSTRUCTIONS

If you were selected for verification you must verify your tax information supplied on the FAFSA. You can have your IRS Tax information verified through the "IRS Data Retrieval."

Log in to your FAFSA form

1. Go to <https://studentaid.gov/h/apply-for-aid/fafsa> and select "LOG IN."
2. Select "I am the student" on the left side of the page.
3. Enter your FSA ID username and password and select "NEXT."
4. On the "Disclaimer" page, click "ACCEPT."
5. Create a save key. (You'll use this if you need to return to this correction later.)

Use the IRS Data Retrieval Tool (DRT)

1. Navigate to the "Financial Information" section.
2. If you are eligible to link to the IRS, you will be able to select the "Link to IRS" button to be transferred to the IRS site. (If you are not eligible to use the IRS DRT, you will not see this button.)
3. Provide the information requested from the IRS in order to confirm your identity. If the IRS site says it can't find your data, make sure the information you entered matches your tax return exactly, including items such as abbreviations in your mailing address.
4. After confirming your identity on the IRS site, choose the option to "Transfer Now." Note: For your protection, your tax return information will not display on the IRS site or on the FAFSA form, but we will inform you that the transfer was successful.
5. Once you've transferred your tax return information into your FAFSA form, navigate to the "Sign & Submit" page.
6. On the "Sign & Submit" page, read the certification statement and check the box indicating that you agree with the statement. Then select "Submit My FAFSA" at the bottom of the page.
7. You will get a confirmation page. Print or Save this for your records.
 - Select "Exit" at the bottom of the page.
 - Select "Logout" at the top of the page.
8. Your updated information will be sent to the Financial Aid Office for each college/university you listed on the FAFSA.
9. Complete all requested documents listed on your Requirements screen in MyLander/Bearcat Web. The forms can be found on-line at: <https://www.lander.edu/admissions/tuition-financial-aid/forms> .

MATCH UNSUCCESSFUL?

- If you receive notification that there was no match in the IRS database you should double check your filing status and address you provided to make sure they match your taxes.
- If that doesn't resolve the problem you may need to order an IRS Tax Transcript from <https://www.irs.gov/> . Just click on "[Get Your Tax Record](#)". Then click on "[Get Transcript Online](#)". Be sure to order a "Tax Return Transcript".
- If that is unsuccessful you can request a Tax Return Transcript from an IRS Office; which can be located using this site: <https://www.irs.gov/help/contact-your-local-irs-office> .
- If that is unsuccessful you can call IRS at 1-800-908-9946. Follow the prompts for tax filer's Social Security Number and number in the address on file. Be sure to select Option 2 to request an **IRS Tax Return Transcript and 2019 for the Tax Year.**
- You may want to re-attempt this process a week later, as it may be a timing issue.