

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."

1. **POINT** your web browser to <http://www.fafsa.gov>
2. **CLICK** on "Returning User Login"
 - o You must enter your first name, last name, SSN, and your date of birth.
 - o Click "Next"
3. **Select** the "2020-2021" tab
4. **Scroll** down and select "Make FAFSA Corrections"
 - o **You must enter your FAFSA FSA ID** (To apply for an FSA ID, if you do not already have one, or for customer service regarding a previously assigned FSA ID, visit <https://fsaid.ed.gov/npas/index.htm>).
 - o You must **create a temporary Password**. This password will be deleted when you hit "submit".
 - o **Click "Next"**
5. **Select "Financial Information" from the bar across the top.**
 - o The "IRS Data Retrieval" screen appears
 - o Select "Already Completed" from the drop down menu
 - o Five Yes/No questions will be asked. If you answer "Yes" to any of these then you will need to request an IRS Tax Transcript. The instructions are below.
 - o If Dependent, select your parent and enter his or her FAFSA FSA ID.
 - o If Independent, enter your FAFSA FSA ID.
 - o Click on "Link to IRS".
6. **A page will come up warning that you are about to leave the FAFSA website. Continue to the next page.**
7. **Follow the on-screen instructions.**
8. **If you are told that your IRS Tax information is not available, you will have to order a Tax Transcript.**
9. **If your data is available you will be asked to verify some information.**
 - o Confirm your name, Select your TAX Filing status, Enter the address you used on your taxes
 - o Click "Submit"
 - o A screen should appear telling you what information will transfer into your FAFSA, review this.
 - o Select the check box for "Transfer my Tax Information into my FAFSA".
 - o Click on "Transfer Now"
10. **For your privacy, the tax information you transfer from the IRS into your FAFSA form will not be visible to you. Instead, you will see "Transferred from the IRS" in the appropriate fields on Fafsa.gov, the IRS DRT web page, and on the Student Aid Report. The information will update the FAFSA and you will be returned to the FAFSA website.**
 - o Select "Next" when ready.
 - o If you are a "Dependent" student you will need to complete steps 5-9 for both the student and a parent.
11. **You will be at the "Sign and Submit" section.**
 - o Enter your FSA ID and select "Agree", click on "Sign"
 - o Repeat this step for each person whose information you are updating: Mother, Father, etc...
 - o **Select "Submit my FAFSA now"**
12. **You will get a confirmation page. Print or Save this for your records.**
 - o Select "Exit" at the bottom of the page.
 - o Select "Logout" at the top of the page.
13. **Your updated information will be sent to the financial aid office.**
14. **Complete the Number in Household Worksheet, found online on your Bearcat Web Financial Aid Requirements page or at <https://www.lander.edu/admissions/tuition-financial-aid/forms> .**

Parent Tax Information

Application was successfully saved.

For 2012, have your parents completed their IRS income tax return or another tax return?
Already completed

You, the parents, may be able to use the IRS Data Retrieval Tool to view and transfer your tax information from the IRS.

Did either or both parents file as Married Filing Separately?
 Yes No

Did either or both parents file as Head of Household?
 Yes No

Did you, the parents, file an amended tax return?
 Yes No

Did you, the parents, file a Puerto Rican or foreign tax return?
 Yes No

Did you, the parents, file taxes electronically in the last 3 weeks (or by mail in the last 8 weeks)?
 Yes No

Based on your response, we recommend that you, the parents, transfer your information from the IRS into this FAFSA.

Enter your PIN and click **Link To IRS**.

Which parent are you?
Select

What is your PIN?

[Apply For A PIN](#)
[Forgot/Don't Know My PIN](#)

LINK TO IRS

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 <http://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 2018 for the Tax Year.**
- You may want to re-attempt this process a week later, as it may be a timing issue.