

May, 2017

**RE: The 2017-18 Academic Year Federal Verification Process  
and Use of the IRS Data Retrieval Tool**

In the past few months there have been a number of news reports surrounding the Department of Education's IRS Data Retrieval Tool, which is available on the FAFSA financial aid application form. Due to security risks, as of March, the Data Retrieval Tool is no longer available for use. It is not expected to be available until October 2017 (for use on the 2018-19 FAFSA). More information on these announcements is available here: <https://studentaid.ed.gov/sa/about/announcements/irs-drt-unavailable>.

Though any FAFSA filer could consider use of the tool, it is especially important for those students and families whose FAFSA record is selected for a process called Federal Verification. Those selected for verification are notified via their Student Aid Report upon submission of the FAFSA. Additionally, the Lehigh Office of Financial Aid notifies students of the additional steps required through application requirements on their financial aid record.

On May 12, 2017, families selected for verification for the 2017-18 academic year, with pending verification requirements, were sent the communication below with more detailed information on what is required to satisfy this process.

If you have any questions about this information or your financial aid record, please contact our office: <http://www1.lehigh.edu/financialaid/contact>.

Sincerely,  
Lehigh Office of Financial Aid

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**May 12, 2017 Letter to Families:**

Dear Student:

Your 2017-2018 FAFSA was selected for verification by the U.S. Department of Education and requirements related to this process were added to the financial aid checklist. If these requirements are already completed, thank you.

**The Federal government has changed the materials needed to satisfy these requirements for the 2017-2018 award year several times in the past few months so we are writing to provide some additional clarity on the process.** Fortunately, the latest updates from the Department of Education will make it much easier to complete the federal verification requirements. In addition to the IRS Tax Transcript, the following are acceptable documents that can be used in lieu of the Data Retrieval Tool:

- Tax filers may submit a signed copy of their 2015 federal tax return.
- Non-filers may submit a signed statement of non-filing (a signed Lehigh University Financial Aid Application can be used to satisfy this requirement) in addition to submitting copies of W-2 forms, if applicable.

Based on this recent update, previously pending federal verification requirements for many students and families have been satisfied using the above items. Since many families have been actively trying to obtain an IRS Tax Return Transcript or IRS Non-filer Verification, **we encourage you to check the status of your federal verification Lehigh requirements as they may now be satisfied**. If the verification requirements are still pending, please note the above alternatives to satisfy the requirement (as these may be easier to obtain/provide than the IRS documents).

Attached are our current instructions on the Federal Verification process. Please be aware that for some families, additional requirements beyond those indicated above may be required to complete the federal verification process.

These pending verification requirements will not prevent us from completing a financial aid review or determining eligibility (as long as all other required materials have been submitted). However, the federal verification process must be completed in order for your financial aid resources to disburse to your Bursar account.

Thank you for your attention to this matter, and we hope this additional information helps with any questions or confusion you may have. As always, please contact our office at [financialaid@lehigh.edu](mailto:financialaid@lehigh.edu) or 610-758-3181 with any questions.

Sincerely,  
Jennifer Mertz  
Director of Financial Aid