LEHIGH UNIVERSITY.

2019-2020 Federal Income Verification Instructions

If you completed a 2019-2020 FAFSA and were selected by the U.S. Department of Education for verification there are additional steps required so that we may verify 2017 federal income tax information, or a status as a non-filer.

- 2017 <u>non-filers</u> must request a Verification of Non-filing form, instructions are below.
    - o Dependent Students are not required to obtain a Verification of Non-filing form
- 2017 <u>tax filers</u> must complete one of the following:
    - o Revise the FAFSA application with use of the IRS Data Retrieval Tool (see instructions below)
    - o Submit a signed copy of the 2017 tax returns

Students required to complete these verification requirements will see unsatisfied financial aid requirements for federal verification of parent (*if a Dependent student*) and/or student income on their Lehigh self-service banner.

Instructions for using the IRS Data Retrieval Tool (for tax filers)

1. Visit www.fafsa.ed.gov and log in with your student information and FSA ID.
2. Select the "Make FAFSA Corrections" option to make a correction to your 2019-2020 FASFA.
3. Select "Financial Information" on the application toolbar.
4. Answer the questions about you and your parent(s)' tax filing statuses.
5. If you were required to file a 2017 federal tax return, make sure that your filing status reads "Already Completed". If you were not required to file a tax return select "Will Not File" as your filing status.
6. If your parents were required to file a 2017 federal tax return, make sure that their filing status reads "Already Completed". If your parents were not required to file a tax return select "Will Not File" as their filing status.
7. Click "View Option to Link to IRS".
8. Enter the requested information on the IRS website.
9. Once your identification has been validated, your IRS tax information will display. Check "Transfer My Tax Information into the FAFSA" and then click the "Transfer Now" button.
10. Make sure this process is completed for both the student and parent's tax information and that you did not change any of the imported data.
11. Re-sign the new corrected FAFSA with your student and parent FSA IDs.
12. Submit your updated FAFSA.

If you have any questions regarding the IRS Data Retrieval Process, you may contact the Federal Student Aid Information Center at 1-800-4-FED-AID to speak with a qualified customer service representative.

Please be aware that not every applicant is eligible to use the IRS Data Retrieval Tool. Students who find one of the following conditions to be true will not be able to complete this process and must submit the necessary tax transcripts from the IRS.

- A married, independent applicant and spouse who filed separate tax returns
- If both custodial parents (of the dependent student) filed separate tax returns
- An applicant or applicant's parent who has had a change in marital status after the end of the tax year on December 31, 2017.
- The applicant, or parent or spouse, as applicable, who has filed an amended tax return.
- The applicant or the applicant's parent and/or spouse, who have an unpaid federal tax liability

Instructions for obtaining an IRS Tax Return Transcript or Verification of Non-filing

Non-filers can request a Verification of Non-filing and Tax filers can request an IRS Tax Return Transcript of their 2016 IRS tax return, free of charge, by the following methods.

1. Online Request
    - Visit IRS web site https://www.irs.gov/individuals/get-transcript
    - Click "Get Transcript By Mail."
    - Enter the tax filer's Social Security number, date of birth, street address, and ZIP Code or postal code. Use the address currently on file with the IRS. This is generally the address that was included on the latest return filed.
    - Click "Continue."
    - In the Type of Transcript field, select either "Verification of Non-filing" or "Return Transcript" and, in the Tax year field, select "2017."
    - Click "Continue."

2. IRS2Go App
    - Apple Online Store at https://itunes.apple.com/us/app/irs2go/id414113282?mt=8
    - Google Play at https://play.google.com/store/apps/details?id=gov.irs

3. Paper Request Form
    - Download IRS Form 4506-T at http://www.irs.gov/pub/irs-pdf/f4506t.pdf.
    - Tax Filers - Select option 6A – Return Transcript
    - Non-Filers – Select option 7 – Verification of Non-filing.