

## IRS DATA RETRIEVAL/TAX FILING DISCREPANCIES FORM

P.O. Box 26170  
Greensboro, NC 27402- 6170  
Phone: 336-334-5702  
<https://bit.ly/2BPdJE0> Document Uploader  
finaid@uncg.edu | <http://fia.uncg.edu>  
Federal School Code: 002976



**UNC  
GREENSBORO**  
Financial Aid Office

Dear Spartan and Family,

In an effort to streamline the federal financial aid application process, the U.S. Department of Education and the Internal Revenue Service worked together to create a way to transfer tax information from the IRS directly to a student's Free Application for Federal Student Aid (FAFSA). They created the IRS Data Retrieval Tool which allows students and parents to access the federal tax return information needed to complete the application for financial aid, and transfer the data directly into their FAFSA from the IRS website. By using the IRS Data Retrieval Tool, the process of applying for financial aid is not only faster, but the application is more accurate. A more accurate FAFSA will help ensure a student is awarded all of the financial aid for which they are eligible.

According to the FAFSA received by our office, your parent(s) attempted to use the IRS Data Retrieval Tool, however, they were not eligible to use the tool and their tax data was not transferred to your FAFSA. While being ineligible to use the IRS Data Retrieval Tool does not mean the information reported on the FAFSA is incorrect, it does mean the income data has not been certified by the IRS or there is a discrepancy in the tax filing status.

In order to review your application and award your financial aid, please complete this form in its entirety and return it to the UNCG Financial Aid Office. It is important to submit the form as soon as possible because your financial aid award will not be processed until all incomplete requirements have been satisfied.

If you need further assistance, please call our office at (336) 334-5702. We are available to answer questions about this form or any other financial aid questions with which you need assistance. You will need to enter the student ID and UNCG PIN into the phone system in order to authenticate your identity and allow our counselors to give you specific information about the student account over the telephone.

Thank you,  
UNCG Financial Aid Office

**Please complete the form on page two and submit to the Financial Aid Office.**

**\*\*\*Please note your financial aid award will not be processed until all requirements, including submission of this form, have been satisfied.\*\*\***

# 2020-2021 IRS DATA/TAX FILING DISCREPANCIES FORM

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**UNC  
GREENSBORO**  
Financial Aid Office

Student Name: \_\_\_\_\_ Student ID: \_\_\_\_\_  
Last First Middle

## SECTION A

I WILL NOT be attending UNCG → Please STOP HERE, check the box below, sign and submit this form.



I will **NOT** enroll at UNCG, please cancel my Financial Aid Award

I WILL be attending UNCG → Please complete sections B and C.

## SECTION B

We have received conflicting information regarding your household size, parent/step-parent marital status, and/or 2018 federal tax filing status. We want to ensure that you receive the financial aid you are eligible for, and we are required to verify these data elements before we can complete your financial aid award.

Please provide the following information so we may review your application. Please answer all questions in their entirety. Incomplete forms will delay processing.

**Note:** The parent(s) of your current household are the parent(s) that you are currently living with (biological parent/adoptive/step-parent) and who will provide more than half of your support now through June 30, 2021.

**Parent #1 Name:** \_\_\_\_\_

Relationship to student (circle one): **Biological - Adoptive - Step Parent**

This Parent is listed on my FAFSA

Parent #1 is Married/Re-married

Name of Spouse: \_\_\_\_\_

Marriage/Re-marriage date: \_\_\_\_\_  
(month/year)

Parent #1 is:

Never Married  Separated  Legally Divorced

Date Separated/Divorced: \_\_\_\_\_

**Parent #1 - 2018 federal tax filing status is** (Please choose only one):

Single  Married filing jointly  Married filing separately  Head of household

**Parent #2 Name:** \_\_\_\_\_

Relationship to student (circle one): **Biological - Adoptive - Step Parent**

This Parent is listed on my FAFSA

Parent #2 is Married/Re-married

Name of Spouse: \_\_\_\_\_

Marriage/Re-marriage date: \_\_\_\_\_

Parent #2 is:

Never Married  Separated  Legally Divorced

Date Separated/Divorced: \_\_\_\_\_

**Parent #2 - 2018 federal tax filing status is** (Please choose only one):

Single  Married filing jointly  Married filing separately  Head of household

## SECTION C

Please select the reason the parent(s) of your current household could not use the IRS Data Retrieval Tool on FAFSA.

The parent of your current household are married and filed taxes as Head of Household in 2018.

Your parent's current marital status:  Married  Separated  Legally Divorced Date of Current Marital Status: \_\_\_\_\_

Biological/Adoptive/Step Parents are separated, divorced, or were never married. Date Separated/Divorced: \_\_\_\_\_

Your biological parents live together but are not married. Date of status: \_\_\_\_\_

My signature certifies and confirms that I have read and understood all instructions and that I have provided accurate, complete, and current information.

Student Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Parent Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Print Parent Name: \_\_\_\_\_ Date: \_\_\_\_\_