

IRS DATA RETRIEVAL/TAX FILING DISCREPANCIES FORM

P.O. Box 26170
Greensboro, NC 27402-6170
Phone: 336-334-5702
[UNCGenie Document Uploader](#)
finaid@uncg.edu | <http://fia.uncg.edu>



**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 phone.

Thank you,

The UNCG Financial Aid Office

Please complete the form (page 2) and submit to the UNCG Financial Aid Office.

If you need space to clarify your marital status, tax filing status, or living arrangement, please use page 3.

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

2021-2022 IRS DATA/TAX FILING DISCREPANCIES FORM

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Federal School Code: 002976



**UNC
GREENSBORO**
Financial Aid Office

Student Name: _____ Student ID: _____
Last First Middle

SECTION A

We have received conflicting information regarding your household size, parent/step-parent marital status, and/or 2019 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, 2022.

PARENT #1: _____

Relationship to student (Circle one):
Biological parent Adoptive parent Stepparent

Parent #1 is currently...
 Married Separated Legally Divorced Never Married

Parent #1 provide information for **ONE** of the following options:

A) If currently Married...
Name of Current Spouse: _____
Marriage/Re-marriage date: _____ (Month/Year)

OR

B) If currently Separated or Divorced
Name of former partner/spouse: _____
Separation/Divorce date: _____ (Month/Year)

Parent #1's 2019 federal tax filing status is (Please choose only one):
 Single Married filing jointly Married filing separately Head of household

PARENT #2: _____

Relationship to student (Circle one):
Biological parent Adoptive parent Stepparent

Parent #2 is currently...
 Married Separated Legally Divorced Never Married

Parent #2 provide information for **ONE** of the following options:

A) If currently Married:
Name of Current Spouse: _____
Marriage/Re-marriage date: _____ (Month/Year)

OR

B) If currently Separated or Divorced:
Name of former partner/spouse: _____
Separation/Divorce date: _____ (Month/Year)

Parent #2's 2019 federal tax filing status is (Please choose only one):
 Single Married filing jointly Married filing separately Head of household

SECTION B

Please **SELECT ONE OF THE FOLLOWING** reasons 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 2019.
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: _____ (Month/Year)

Your biological parents live together but are not married since _____ (Month/Year)

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: _____

PERSONAL STATEMENT

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**UNC
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Student Name: _____ Student ID: _____
Last First Middle

Please use this space to clarify your marital status, tax filing status, and/or living arrangements.

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, 2022.

By signing this statement, I certify under penalty of perjury, that the information I have reported on this form is complete and accurate. I understand that purposely giving false or misleading information to qualify for federal student aid is a federal offense that can result in fines and/or incarceration.

Signature: _____ Date: _____

Printed Name: _____