



## Financial Aid Important Steps after FAFSA

After submitting your Free Application for Federal Student Aid (FAFSA), there are important steps you must follow to receive your financial aid award money. Prompt follow-up is extremely important to ensure you receive your awards before classes begin.

1. **Review Your SAR:** Once you submit your FAFSA, it will be processed and a Student Aid Report (SAR) will be created for you and each college you listed. Review your SAR carefully to check for accuracy. You will receive instructions to view your SAR online if you included your email address on your FAFSA, or you will receive a hard copy by mail.
2. **If Needed, Change or Correct Your FAFSA:** If your SAR includes any inaccurate information, log back into your online FAFSA account to make corrections. If you did not use the Internal Revenue Service (IRS) Data Retrieval Tool to link to tax information for yourself or your parent(s) when you completed FAFSA, log back into your online FAFSA account to try using the IRS Data Retrieval Tool again. See back page for information about the IRS Data Retrieval Tool.
3. **Check Your College Email Frequently:** The Office of Financial Aid (OFA) at each college included on your FAFSA will review your SAR and determine if any additional documentation is required to verify the information on your FAFSA. If additional information is needed, you must provide it before the OFA can determine your eligibility for need-based financial aid. If additional information is required, the OFA will notify you by email.
4. **Follow Up Quickly:** If the OFA requests additional information, follow the instructions in the email right away and answer the email. Be sure to make copies of everything before you submit information to the OFA.
5. **Call or Visit the Office of Financial Aid:** You should also call or visit the OFA - they are there to help. We strongly encourage you to contact the OFA by phone or in person for help providing additional information and to make sure they receive the information you submit!
6. **Review and Accept Awards:** Once the OFA has received and processed all of your information, review your notice of offered financial aid awards carefully and follow the instructions to accept your awards. If you accept student loans, you will need to complete entrance loan counseling and sign a Master Promissory Note.

### Gather Information Now

The most common types of information that must be verified are listed below. Begin gathering this information now so you'll be ready to provide copies of it to the OFA, if requested.

**Important - Do not send verification information listed below unless it is requested!**

Information that May Be Required for Verification:

- Proof of identity with either a Driver's License or State issued ID;
- Proof of Supplemental Nutrition Assistance Program (SNAP) benefits, formerly called food stamps, you or your parent(s) receive;
- Proof of child support paid;
- Proof of income and tax information - Instructions found on back
  - o Added directly to FAFSA using the IRS Data Retrieval Tool
  - o Requested from the IRS directly via an IRS Tax Return Transcript

**\*\*Check your email often to find out what, if any, additional information you must provide.\*\***

### IRS Data Retrieval Tool:

The IRS Data Retrieval Tool links directly to IRS records to transfer tax and income information for students and parents directly to the FAFSA. Using the IRS Match makes the FAFSA easier to complete, and simplifies follow up steps with your college. Once you use the IRS Match to transfer information to your FAFSA, do not change the information that was transferred to your FAFSA from the IRS.

To increase the likelihood that a match will be found when using the IRS Data Retrieval Tool:

- Enter name and address information EXACTLY as it is shown on the tax return
- If married, filing jointly, use the primary filer's information
- Wait 2 weeks after e-filing your federal income tax return, or 4-8 weeks after submitting taxes by mail

If you cannot use the IRS Data Retrieval Tool when you first complete your FAFSA because taxes were recently filed, log back into your online FAFSA account after your SAR is available and use the tool to update the tax information for yourself and/or your parents.

- 1) Log into your FAFSA account at [www.fafsa.gov](http://www.fafsa.gov).
- 2) Click on the link "Make FAFSA Corrections" if you previously completed a FAFSA.
- 3) Then click on a tab on the top of your FAFSA that says "Financial Information."
- 4) On the "Financial Information" page, click on "Link to IRS."
- 5) This will take you away from your FAFSA account and link you directly to an IRS page where you will enter personal information (and you will need to do all of this a second time if you are doing both student and parent retrieval). **Make sure you spell your name and street address exactly as they appear on your 1040 federal tax return.**
- 6) After you enter your personal information, follow the directions to "Submit" and then "Transfer" your IRS tax data to your FAFSA.
- 7) Make sure to go to the last page of your FAFSA to sign and re-submit the FAFSA.

Students and parents are not eligible to use the IRS Data Retrieval tool if any of the following apply:

- A married independent applicant and spouse filed separate tax returns
- Parents of a dependent student filed separate tax returns
- The applicant, parent, or spouse, as applicable, filed an amended tax return
- The parents are married and file as Head of Household
- Parents enter all zeroes for Social Security Number (SSN) on FAFSA
- Any student or parent with a change in marital status since January 1, 2015
- Any student or parent who indicates they have not already filed a tax return or will not file a tax return

*Note: If you are unable to use the IRS Data Retrieval Tool, see "Requesting a Tax Return Transcript."*

### Requesting a Tax Return Transcript:

If you are unable to use the IRS Data Retrieval Tool because you or your parents are ineligible to do so, you must obtain a **tax return transcript** from the IRS and may be required to submit a copy to each college listed on your FAFSA.

There are three ways to request a tax return transcript. All are free of charge. It may take several weeks to process your request, so make the request as soon as possible after your taxes have been processed. Be sure to request a "**tax return transcript**" not a "tax account transcript."

- 1) **By phone:** 1-800-908-9946 (7 a.m. - 7 p.m.)  
Transcripts requested by phone can be mailed or faxed to the requestor. If a person has access to a fax machine during the phone call, the IRS can provide a copy immediately.
- 2) **Online Request Form**  
In the "tools" section on [www.irs.gov](http://www.irs.gov), click on "Order a Tax Return or Account Transcript."  
Transcripts requested through the online form can only be sent to the address on file with the IRS. If the transcript needs to be sent to a different address, request it by phone or mail.
- 3) **Request By Mail Using Form 4506T-EZ**  
<http://www.irs.gov/pub/irs-pdf/f4506tez.pdf> (English)  
<http://www.irs.gov/pub/irs-pdf/f4506tes.pdf> (Spanish)

The English and Spanish forms linked above can be used to request IRS tax return transcripts for those whose address or name have changed.