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RGM Memo

Date: April 14, 2014
To: School Owners and Financial Aid Personnel
RE: IRS Type Flags and Retrieval Codes

On page 3 of the ISIR you will see if the student completed the IRS data retrieval process when filling out the FAFSA. Below is an example of an Independent student who successfully used the IRS data retrieval process because it has a 02 value.

| | | | |
|----------------------|---|-----------|----------|
| High School Flag | | Y | |
| Student IRS Req Flag | ← | 02 | Student |
| Parent IRS Req Flag | → | 00 | Parent I |
| Auto Zero EFC Flag | | | Rejected |
| EFC Change Flag | | NO CHANGE | Verifica |
| SNT Flag | | Y | Special |
| Match Flags: SSN | 4 | SSN | 2 DHS S |

On the following page I have added the other values that may appear on the student ISIR along with the meanings. .

Please print this for your reference.

Thank you,
Rafael

IRS Request Flags

The Student IRS Request Flag and Parent IRS Request Flag on the ISIR help you determine if an applicant was eligible for the IRS data retrieval process, if data was retrieved from the IRS, and if the data from the IRS was modified. The IRS Request Flag is different from the new IRS Display Flag (described later in the guide), which informs the school if the student or parent was presented with the IRS Data Retrieval Tool, and if not, the reason it was not displayed

| ISIR Value and Value Printed on ISIR | Description |
|---|--|
| Blank | IRS Data Retrieval Tool not available in the application method utilized by the student (for example, paper FAFSA, EDE, or FAA Access) |
| 00 | Not eligible to use the IRS Data Retrieval Tool and was therefore not presented with the option to use it in FAFSA on the Web |
| 01 | Presented with the option to use the IRS Data Retrieval Tool in FAFSA on the Web and elected to use it, but did not transfer IRS data into the FAFSA |
| 02 | IRS data was transferred from the IRS and was not changed by the user prior to submission of an application or correction |
| 03 | IRS data was transferred from the IRS and changed by the user prior to submission of an application or correction |
| 04 | IRS data was transferred from the IRS and then changed by the user on a subsequent transaction |
| 05 | Presented with the option to use the IRS Data Retrieval Tool in FAFSA on the Web, but did not elect to use it |
| 06 | IRS data was transferred from the IRS, but a subsequent change made the student or parent ineligible to use the IRS Data Retrieval Tool |