**R. Gonzalez Management Inc. (RGM)**

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**RGM Memo**

Date: June 15, 2018

To: Dear School Owners and Financial Aid Personnel,

RE: Changes to IRS retrieval for 18-19

Dear School Owners and Financial Aid Personnel,

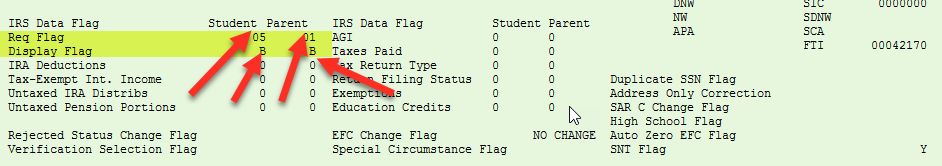
RGM MEMO JUNE 15, 2018

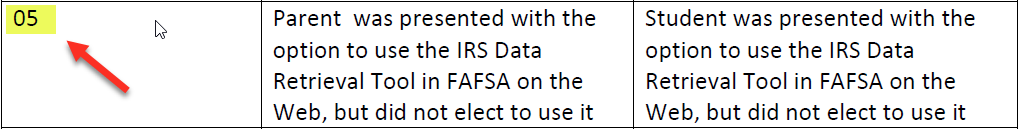
This email is a follow up email on a memo that we sent out in August 2017. We are sending this memo with more details and samples to help schools verify items carefully on the ISIR. An Electronic Announcement was posted on August 7, 2017, informing us of changes to the IRS Data Retrieval Tool Process for the 2018-2019 FAFSA Form. **There is a new IRS Request Flag Value, which is code 07. This code indicates that the IRS data for the parent and/or student was transferred from the IRS, but the IRS indicated that the parent and/or student filed an amended tax return**. The Electronic Announcement provides detailed guidance regarding that solution and its impact on the important work done by postsecondary institutions. Topics include: 2018-2019 Changes to the FAFSA IRS DRT User Experience, New and Changed IRS Request, Display, and Data Field Flags, Corrections, Web Edits and SAR Comments. Below we have included the link to the Electronic Announcement. We have attached Appendix A “IRS request flags” and Appendix B “IRS display flags” codes and samples on a couple of student ISIRs.

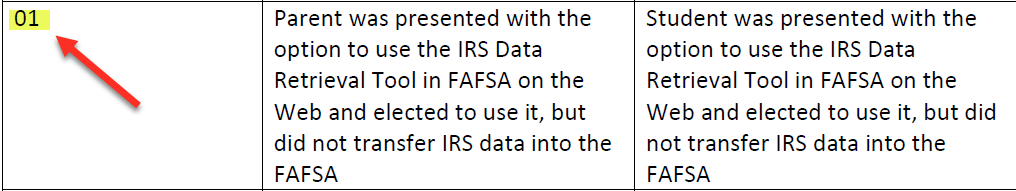
Please copy and paste link to your browser:

<https://ifap.ed.gov/eannouncements/080717ChangestoIRSDRT1819FAFSAForm.html>

**This sample is for a dependent student: You need the IRS transcripts for both student and parent.**

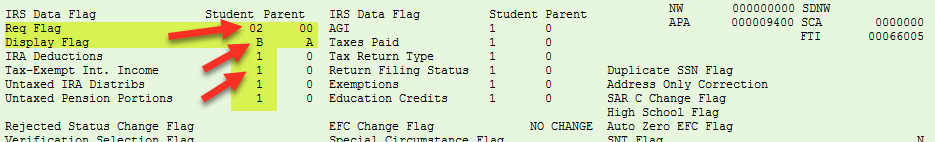


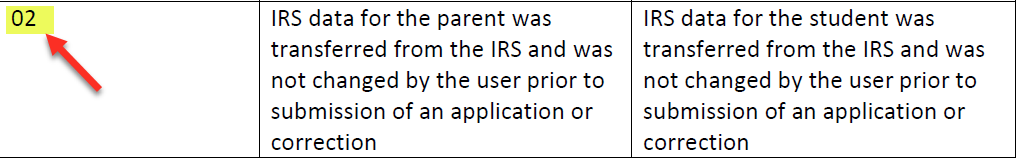






**This Sample is for an independent student: You do not need the IRS Transcripts.**

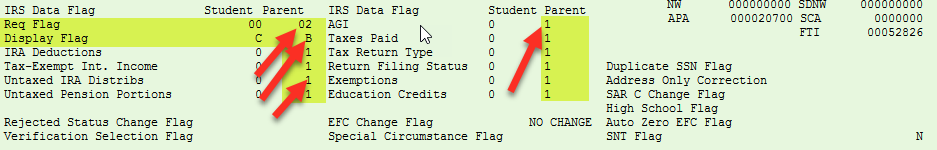


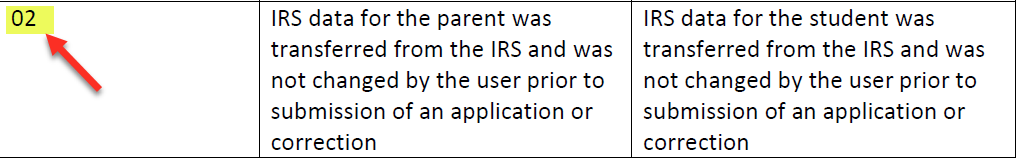






**This Sample is for a dependent student who did not file: You do not need the IRS Transcripts for the parent or a verification of a non-tax filer for the student.**

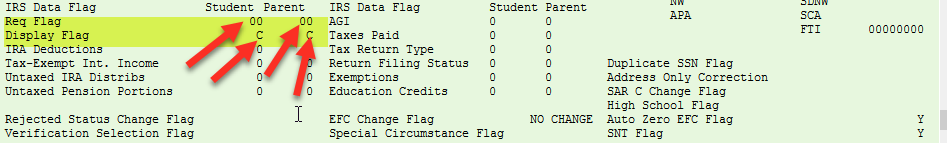


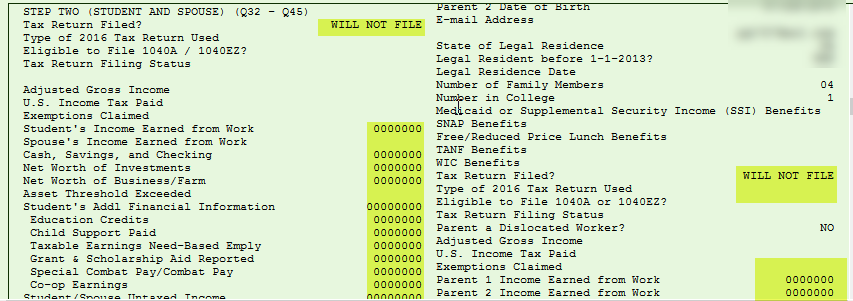


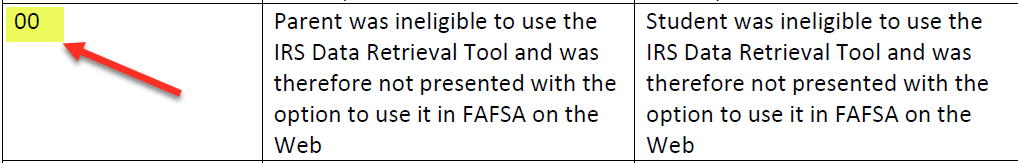


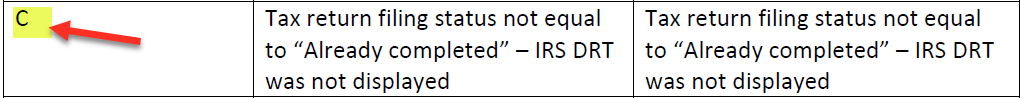


**This sample is for a dependent student who did not file neither did the parents. You will need the verification of non-tax filer for the parent but not for the student.**



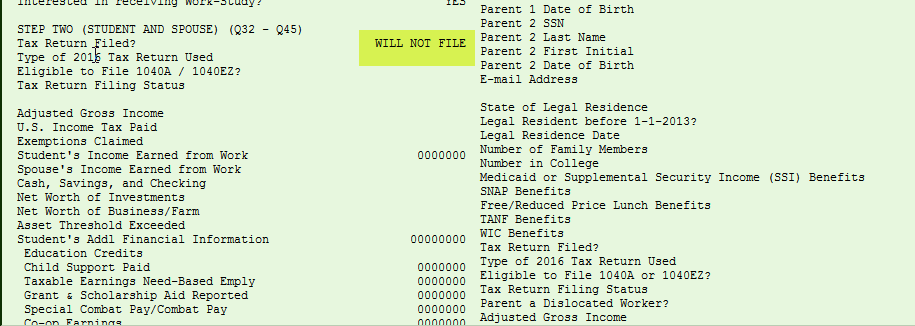


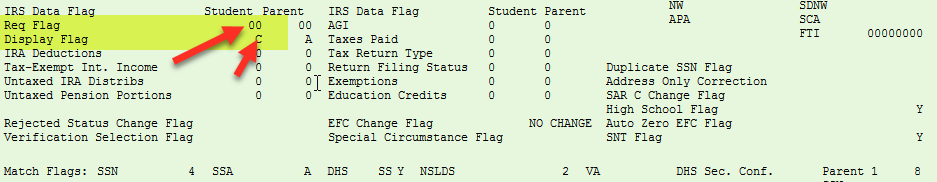


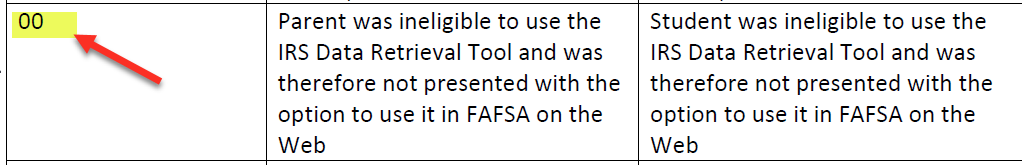


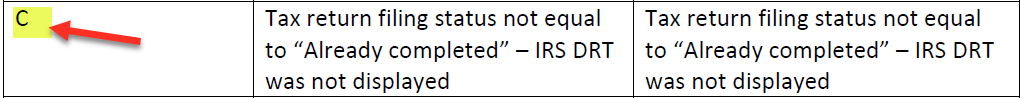


**This sample is for an independent student that did not file taxes. This student needs verification of non-tax filer.**

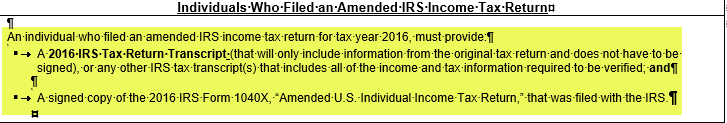


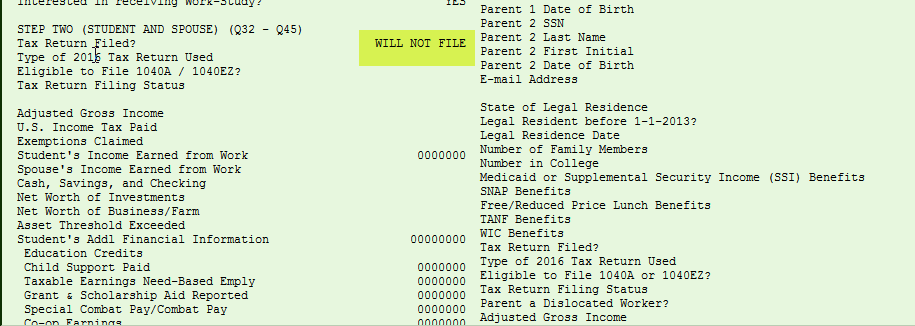


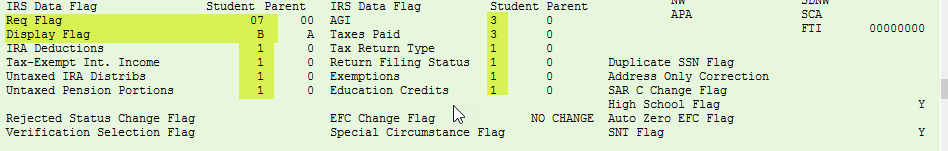




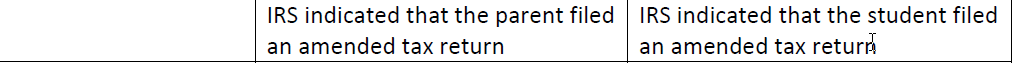
**This sample is for an independent student that did an amended tax return. Please see below on what you are required to have.**









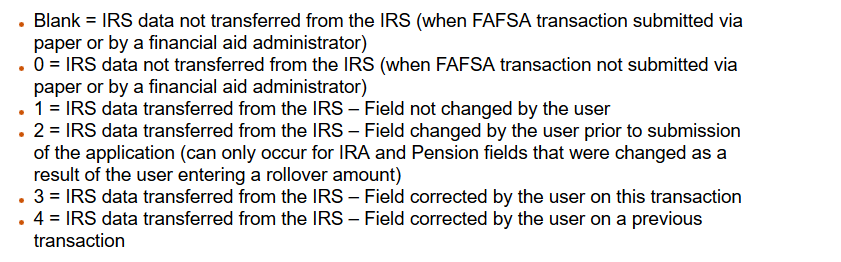


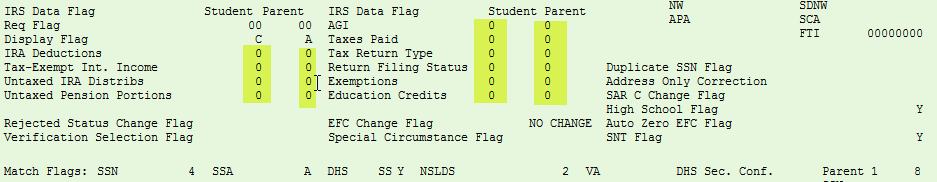




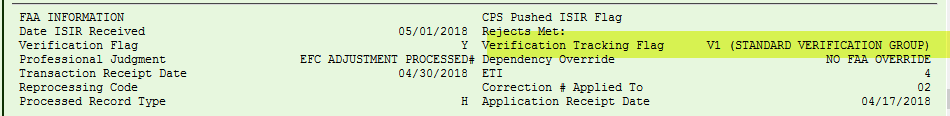


**The codes below are the IRS Data field Flags:**





**Please remember this is only for students who are selected for Verification Tracking flags 1 and 5. You can find the Verification Tracking flag group on page #3.**



The only code you do not need an IRS Transcript is **02,** any other code you will need to provide them.

If you have any questions, please contact us.