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

Student Financial Aid Services Phone No. (323) 730-8700

3560 S. La Cienega Blvd. Suite G Fax No. (323) 730-8701

Los Angeles, CA 90016-4400 Web Page <http://www.rgmsms.com>

**RGM Memo**

Date: June 15, 2018

To: Dear School Owners and Financial Aid Personnel,

RE: IRS Data Retrieval tool

This is a reminder on 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. Below we have a few samples on the codes comparing with an ISIR.

**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.