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IRS TAX TRANSCRIPTS

Each year the Department of Education selects a number of applications for a review process called Verification. During this process, our office must confirm the accuracy of the information reported on the FAFSA. Income data is confirmed either by updating the FAFSA using the IRS Data Retrieval Tool or submitting a copy of the IRS Tax Return Transcript.

1. IRS Data Retrieval: The data retrieval tool allows you to import your tax data from the IRS to the FAFSA. The link to the tool is found under the Tax Information tab on the FAFSA. Both parent and student tax filers must self-authenticate before the IRS data can be accessed. **You will not need to submit copies of your IRS Tax Transcript if you are able to successfully transfer your IRS data to your FAFSA.**

A screenshot of the "Student Tax Information" form. At the top, it says "Application was successfully saved." Below that, there are two dropdown menus: "For 2013, have you completed your IRS income tax return or another tax return?" with "Already completed" selected, and "For 2013, what is your tax filing status according to your tax return?" with "Married-Filed Joint Return" selected. A message states: "You may be able to use the IRS Data Retrieval Tool to view and transfer your tax information from the IRS." There are three radio button questions: "Did you file an amended tax return?" (No selected), "Did you file a Puerto Rican or foreign tax return?" (No selected), and "Did you file your taxes electronically in the last 3 weeks (or by mail in the last 11 weeks)?" (No selected). A recommendation box says: "Based on your response, we recommend that you transfer your information from the IRS into this FAFSA. Enter your PIN and click Link To IRS." Below this is a PIN input field with four dots, an "Apply For A PIN" link, and a "LINK TO IRS" button. At the bottom, there are "PREVIOUS" and "NEXT" navigation buttons, and a footer bar with "NEED HELP?", "SAVE", "CLEAR ALL DATA", "VIEW FAFSA SUMMARY", and "EXIT" buttons.

2. IRS Tax Transcripts: If the IRS data is not available to transfer to your FAFSA, you can request a copy of the IRS Tax Transcript, free of charge, in one of four ways. Tax transcripts can be submitted to our office via email, regular mail, or fax. **When submitting tax transcripts, please be sure to indicate your student's name, and NU ID number on the top of each page.**

Online Request: IRS's preferred transcript delivery is available for immediate download online at <http://www.irs.gov/Transcript>.

Telephone Request: Available by calling the IRS at 1.800.908.9946. Tax filers must follow the prompts to enter their social security number and the numbers in the street address. Generally, this will be numbers of the street address that was listed on the latest tax return filed. However, if an address change has been completed either through the IRS or the US Postal Service, the IRS may have the updated address on file. For a joint return, use the primary tax filer’s social security number, date of birth, street address, and zip or postal code.

Paper Request: Available by using IRS Form 4506T-EZ to request an IRS Tax Return Transcript or IRS Form 4506T to request an IRS Tax Account Transcript (if a tax return amendment was filed).

NOTE: The paper request allows tax filers to mail the transcripts to a third-party. Though Northwestern University is an approved third-party, we do not recommend that you use this option. We urge tax filers to receive their transcripts directly from the IRS and then submit a copy to our office. This way, your family will be able to retain a copy of the transcript for your records and will prevent processing delays.

In Person Request: Tax filers can request tax transcripts from their local IRS Office. Be advised that you will be asked to provide valid photo identification to receive services. To find the location of the closest IRS Office, please visit <http://www.irs.gov/uac/Contact-Your-Local-IRS-Office-1>.

Transcript Availability: Use the IRS table below to determine the general timeframe when you can request a transcript for a current year Form 1040, 1040A, or 1040EZ return filed on or before the April due date. Availability varies based on the method you used to file your return and whether you have a refund or balance due.

When your original return shows a ...	and you filed <i>electronically</i>, then	and you filed on <i>paper</i>, then
refund amount or no balance due,	allow 2-3 weeks after return submission before you request a transcript.	allow 6-8 weeks after you mailed your return before you request a transcript.
balance due and you paid in full with your return,	allow 2-3 weeks after return submission before you request a transcript.	we process your return in June and you can request a transcript in mid to late June. Note: we process all payments upon receipt.
balance due and you paid in full after submitting the return,	allow 3-4 weeks after full payment before you request a transcript.	
balance due and you didn't pay in full,	we process your return in mid-May and you can request a transcript by late May.	