Requesting a Tax Return Transcript

What is a Tax Return Transcript?
A tax return transcript is the formatted record of a tax return filed with the IRS. The IRS makes tax return transcripts available to individuals that request it free of charge.

Why does my school need a Tax Return Transcript? Can’t I just give them a copy of my tax return?
When processing submitted FAFSAs, the Department of Education selects about one third of all applications to confirm information provided. A school may request a student’s or parents’ Tax Return Transcript (or the use of the IRS Data Retrieval Tool) in order to verify financial information reported on the FAFSA. For information on how to use the IRS Data Retrieval Tool, visit here.

Department of Education regulations require that schools collect Tax Return Transcripts or have students and/or their parents use the IRS Data Retrieval Tool in lieu of any other documentation if required to file taxes.

How do I request a copy of a Tax Return Transcript?
To request a Tax Return Transcript:
Visit www.IRS.gov/individuals/get-transcript

Select the method to receive your Tax Return Transcript
- Online (available immediately)
- Mail (received via mail in about 5-10 business days)

After selecting the method to receive the Tax Return Transcript, individuals will be notified that the use of the website is for authorized use only. Select “OK”

Indicate whether creating a new account or sign-in with an existing account.

Note: Users will need to create an account the first time requesting a Tax Return Transcript.
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To Sign Up provide the following information:

- First and Last Name
- Email Address

Then select “Send Email Confirmation Code”

Open a new web-browser and retrieve the confirmation email. It will arrive within minutes of submission. **DO NOT CLOSE THE IRS WINDOW** while checking your email.

Enter the confirmation code.

Provide the following information:

- Social Security Number or Individual Tax ID Number (ITIN)
- Date of Birth
- Filing Status
- Address
- Phone and Mobile Phone Numbers (Optional)

Select the option at the bottom of the page “Proceed as guest” **ONLY** if you wish to re-enter this information every time a new transcript is requested. If not, do not check the box.
Answer the security questions provided. This may require the review of financial information over the past several years.

Create a Security Profile:

- Create a “Site Phrase”
- Select a “Site Image”
- Provide 4 Security Questions and Answers
  - *The same answer cannot be used more than once to a question*
- Create a “User ID” (Cannot be an email address, SSN or contain a space or @)
- Create and verify a Password
  - *Password must be at least 8 characters long.*
  - *Password must contain at least one numeric and one special character (!@#$%^&*—)._*
  - *Password must have at least one uppercase and at least one lowercase letter.*
  - *Password cannot be the same as the User ID.*
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If successful, notification will be provided. Select “Continue”

Select a reason you need a transcript: “Higher Education/Student Aid”

- The type of transcripts recommended will be highlighted with green and will include text on the recommended transcript to request.

Note: Be sure to disable the pop-up blocker from the web-browser.

The Tax Return Transcript will open in a new tab in the web-browser. Submit the document to the Student Financial Aid Office via email (finaid@niu.edu), fax (815-753-9475) or in-person to Swen Parson Hall Room 245