2022-2023 TAX RETURN TRANSCRIPT INFORMATION SHEET

Your application was selected for review in a process called “Verification.” In this process, MSU Northern will be comparing information from your application with your financial documents. The law says we have the right to ask you for this information before awarding Federal aid. Submit the tax return transcript as soon as possible, so your financial aid will not be delayed.

HOW CAN I GET A STUDENT, SPOUSE &/OR PARENT TAX RETURN TRANSCRIPT?

You may fulfill this requirement one of two ways:

1. Submit IRS Data Retrieval directly from the IRS:

   1. Log into the FAFSA – www.fafsa.gov
   2. Enter your Student Information and FSA ID
   3. Click on the link “Make Corrections” (if you previously completed the FAFSA)
   4. Click on the “Financial Information” tab at the top
   5. On the “Financial Information” page, click on the link “view option to link to the IRS” or “link to IRS”
   6. Link to IRS
   7. Your FAFSA will be saved and you will be transferred to the IRS Web site.
   8. On the IRS Web site, enter the requested information (make sure the information is entered EXACTLY as it appears on the federal tax return).
   9. Applicants will need to authenticate their identity before any personal information is displayed.
   10. Once the IRS has validated your identification, your IRS tax information will display. Follow the instructions to “submit” and “transfer” your information from the IRS.
   11. If you transfer your IRS tax information, questions that are populated with tax information will be marked with “Transferred from the IRS.” DO NOT make any changes to these fields.
   12. IMPORTANT: Return to the FAFSA to Sign & Submit the corrections, using your FSA ID.
   13. Once the corrections have been submitted, you should receive a message stating “Processed Successfully”

Reminders with regard to the IRS Data Retrieval tool
IRS Data Retrieval can be used for initial application as well as corrections. The information used for the login on the IRS site has to match what is on the tax form exactly, i.e. Address and Marital Status. Generally, tax information is available on the IRS Data Retrieval Tool within 10 days after filing taxes electronically, 6-8 weeks if filing taxes using the U.S. Postal Service. Data transferred from the IRS will populate the appropriate FAFSA fields. Each field will be labeled “Transferred from the IRS.” If your federal tax return indicated a balance owed, this may result in a delay in processing.

2. Request a Tax Return Transcript from the IRS:

If you are unable to use the Data Retrieval process through IRS for one of the following acceptable reasons you MUST request a Tax Return Transcript from the IRS:

- My tax filing status is Married Filing Separately
- My tax filing status is Head of Household
- I made changes to the tax questions on the FAFSA after I processed the IRS Data Retrieval
- I filed an amended tax return
- I filed a Puerto Rican or foreign tax return

MSU Northern does not discriminate on the basis of race, color, national origin, sex, age or disability.
You can obtain a copy of your tax transcript in one of the following ways:

- Print a tax return transcript immediately at http://www.irs.gov/Individuals/Get-Transcript - select “get transcript online” (or request by mail to receive in 5 to 10 calendar days – select “get transcript by mail”)

- Obtain a copy of the IRS tax return transcripts directly from the local IRS office (specific locations only). To locate an IRS office, please visit the following website: http://www.irs.gov/localcontacts/index.html.

- Use IRS Form 4506T-EZ “Short Form Request for Individual Tax Return Transcript” (preferred) or IRS Form 4506-T “Request for Transcript of Tax Return”

- Dial 1-800-908-9946 (option #2) to request a transcript to be sent directly to you. Listen carefully to the automated menu, after entering SSN, and address info there will be a brief description and explanation. Once provided options, select Transcript of Tax Return = OPTION #2. You will then be prompted to enter the tax year for which you are requesting (Ex: 2016). The system will then confirm the request. Allow five to ten days for delivery if ordered online or by phone.

- Using the IRS2Go App:

  Apple Online Store at: https://itunes.apple.com/us/app/irs2go/id414113282?mt=8

There is NO charge for tax transcripts.