Helpful hints before you begin:

- If your tax filing status is “Married, Filing Jointly,” please review your 1040 to see which spouse’s name is listed in the top line. You will need to use that person’s Social Security Number as you request your Tax Return Transcript.
- If you are married and filed separately, please be sure to request two Tax Return Transcripts, yours and your spouse’s.
- If you owe the IRS any payment of taxes, your Tax Return Transcript will not be available to you until a few weeks after your payment has been received by the IRS.
- Once you download or receive your Tax Return Transcript, make a copy for your records. Write the student’s name and Trinity ID# on the transcript before submitting it to the Financial Aid Office.

Requesting a Tax Return Transcript Online:

Before you can request your Tax Return Transcript, you must create an account. If you already have an account, proceed to step 8. To create an account, follow the steps below.

2. Select CREATE AN ACCOUNT.
3. Enter your information. Then select **SEND EMAIL CONFIRMATION CODE**.

A green notification bar and Confirmation Code field will appear. You will receive an email containing an eight digit confirmation code. Enter this number exactly and continue to the next page.
4. Enter your personal information. Your Filing Status and Address must be entered exactly as it was reported on your most recent tax return. Click CONTINUE.

**IMPORTANT:** If the information you provide on this screen does not exactly match your tax return, you will not be allowed to proceed. (Example: if your address is stated as Dr. on your tax return and you enter Drive in the address field, you cannot proceed to the next step). After three unsuccessful attempts, you will be locked out of the website for 24 hours.

**Note:** We recommend that you do not check this box.
5. Answer the questions according to your financial history. Click CONTINUE.

6. Establish a Site Phrase and Site Image for your account.

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**Site Phrase and Site Image**

Create a Site Phrase and select a Site Image that you will recognize whenever you sign in. The IRS will never ask you to log in without presenting the Site Image and Site phrase that you select.

Site Phrase

Site Image

1 of 16 pages
7. Establish security questions and an account User ID and Password.

**Question**

**Answer Rules**
- The same answer cannot be used more than once.
- The answer cannot be a word or number that is part of the secret question.

**Question 1**

Answer 1

**Question 2**

Answer 2

**Question 3**

Answer 3

**Question 4**

Answer 4

**User ID and Password**

User ID (cannot be an email address, SSN or contain a space or @)

Password Rules
- Password must be at least 8 characters long.
- Password must contain at least one numeric and one special character (including @#$%^&*_).  
- Password must have at least one uppercase and at least one lowercase letter.
- Password cannot be the same as the User ID.

Password

Re-enter Password

Congratulations! You have established your IRS account and can now request an immediate copy of your IRS Tax Return Transcript. Click **CONTINUE** to do so.
By clicking Continue, you will be directed to the following screen:

![IRS Get Transcript](image)

**Get Transcript**

Please select the reason you are requesting a transcript to help us determine the appropriate transcript for your needs.

- Higher Education/Student Aid
- FEMA/Disaster Related
- State or Local Tax Issue
- Mortgage Related
- State Licensing
- Income Verification
- Federal Tax
- Small Business Loan
- Health Care
- Immigration
- Housing Assistance
- Other

Below are the transcripts and years available.

<table>
<thead>
<tr>
<th>Return Transcript</th>
<th>Record of Account Transcript</th>
</tr>
</thead>
</table>

**Account Transcript**

| 2013 | 2012 | 2011 | 2010 | N/A | N/A | N/A | N/A |

**Wage & Income Transcript**


* The “Verification of Non-Filing” letter provides proof from the IRS that you did not file a return for the year you have selected.

8. Select **HIGHER EDUCATION/STUDENT AID**. This will highlight **RETURN TRANSCRIPT**. Select the desired year (usually the most recent year taxes were filed) to generate a Tax Return Transcript of that year. For financial aid for the 2014-15 academic year, the appropriate tax year is “2013.” For financial aid for the 2015-16 academic year, the appropriate tax year is “2014.”

**NOTE:** If the desired year is not shown, the IRS may still be processing your tax return, meaning it is too soon to request a Tax Return Transcript. If this is the case, wait several weeks before trying these steps again.
9. After selecting the desired year, you will be directed to a PDF screen generated by the IRS.

This is your Tax Return Transcript. Print this entire document. Include the student’s name and Trinity ID # and send to the Financial Aid Office by fax or mail.

Congratulations, you have successfully requested an IRS Tax Return Transcript!

**NOTE:** If you are being asked to provide proof that you have not filed taxes, see the note at the bottom of the GET TRANSCRIPT screen (enlarged here) for information on requesting a “Verification of Non-Filing” letter.

* The “Verification of Non-Filing” letter provides proof from the IRS that you did not file a return for the year you have selected.

**Requesting a Tax Return Transcript by Mail:**

If you experience difficulty in requesting a Tax Return Transcript online, you may also request to have a Transcript sent to you by mail. To Request a Tax Return Transcript by mail, go to [http://www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript) and follow the directions. Once you receive the Tax Return Transcript, make a copy for your records and submit the document to the Financial Aid Office by fax or mail. Be sure to include the student’s name and Trinity ID #.

**Return documents to:**

Trinity College
Financial Aid Office
300 Summit Street
Hartford, CT 06106

or

Fax: (860) 987-6296