

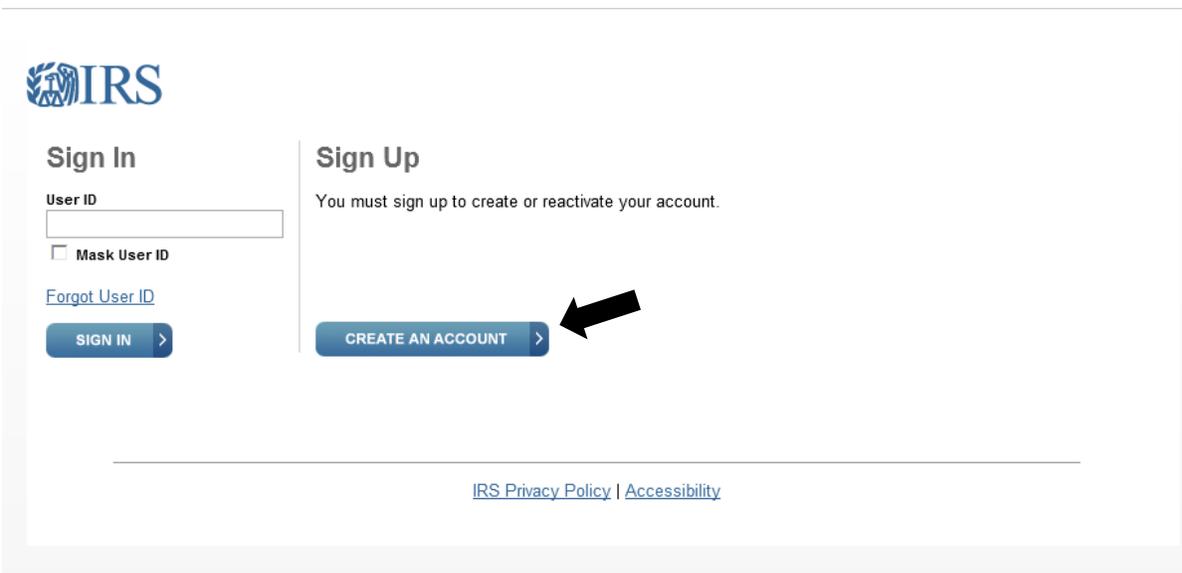
## Helpful hints before you begin:

- 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.

1. Go to: <https://sa1.www4.irs.gov/eauth/pub/login.jsp>
2. Select *CREATE AN ACCOUNT*.



The screenshot shows the IRS website's login and sign-up interface. On the left, under the "Sign In" heading, there is a "User ID" input field, a "Mask User ID" checkbox, a "Forgot User ID" link, and a "SIGN IN" button. On the right, under the "Sign Up" heading, there is a message: "You must sign up to create or reactivate your account." Below this message is a "CREATE AN ACCOUNT" button, which is highlighted with a black arrow pointing to it from the right. At the bottom of the page, there are links for "IRS Privacy Policy" and "Accessibility".

3. Enter your information. Then select *SEND EMAIL CONFIRMATION CODE*.

The screenshot shows the IRS logo at the top left. Below it is the heading "Sign Up: Step 1 of 6" followed by the instruction "All fields are required." There are four input fields: "First Name", "Last Name", "Email", and "Confirm Email". Below the fields is the text "Click the 'Send Email Confirmation Code' button. A confirmation code will be sent to your email address." At the bottom of the form are two buttons: "CANCEL" and "SEND EMAIL CONFIRMATION CODE" with a right-pointing arrow. A black arrow points to the "SEND EMAIL CONFIRMATION CODE" button. At the very bottom, there is a link for "IRS Privacy Policy | Accessibility".

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.

The screenshot shows the IRS logo at the top left. Below it is the heading "Sign Up: Step 2 of 6". A green notification bar contains the text: "Retrieve your confirmation code by viewing your email in another browser window. Do not close this window, or you will have to restart the process." Below this is the instruction: "All fields are required. Do not close or navigate away from this page until your registration is complete. Please click the 'Verify Email Confirmation Code' button at the bottom of the page to continue." There are three input fields: "First Name", "Last Name", and "Email", each with a blacked-out value. Below these is the "Enter Confirmation Code" section with two input boxes and a link "Resend Email Confirmation Code". At the bottom are two buttons: "CANCEL" and "VERIFY EMAIL CONFIRMATION CODE" with a right-pointing arrow. At the very bottom, there is a link for "IRS Privacy Policy | Accessibility".

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.



### Sign Up : Step 3 of 6

All fields are required. Your information must match your most recently filed tax return.

#### Personal Information

First Name

Last Name

Email

Social Security Number (SSN) or Individual Tax ID Number (ITIN)

-  -

Date of Birth

Month  Day  Year

#### Filing Status

I have filed a tax return in the past seven years

Select Status

I have not filed a tax return in the past seven years

Country

United States

Address Line 1

Address Line 2 (Optional)

City

State/U.S. Territory

Zip Code

Phone Number (Optional)

Mobile Number (Optional)

Select checkbox and click the "Continue" button to proceed as guest. Proceeding as a guest user will require you to enter this information every time you access the system. If you would like this information stored for future use do not check the box. Click the "Continue" button to create a User ID and password.

CANCEL

CONTINUE >

**Note:** We recommend that you **do not** check this box.



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 can not 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 (!@#%&\*\_~).
- 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.

 [Contact Us](#)

**User Profile Successfully Created**

Your profile was successfully created. Be sure to write down your User ID for future reference. Please click the "Continue" button to go to your selected application.

**Note:** All future correspondence will be via email.

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[IRS Privacy Policy](#) | [Accessibility](#)

By clicking Continue, you will be directed to the following screen:



[Sign Out](#)

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

Below are the transcripts and years available.

|                                     |                      |                      |                      |                                     |                      |                      |                      |
|-------------------------------------|----------------------|----------------------|----------------------|-------------------------------------|----------------------|----------------------|----------------------|
| <u>Return Transcript</u>            |                      |                      |                      | <u>Record of Account Transcript</u> |                      |                      |                      |
| <a href="#">2013</a>                | <a href="#">2012</a> | <a href="#">2011</a> | <a href="#">2010</a> | <a href="#">2013</a>                | <a href="#">2012</a> | <a href="#">2011</a> | <a href="#">2010</a> |
| <u>Account Transcript</u>           |                      |                      |                      |                                     |                      |                      |                      |
| <a href="#">2013</a>                | <a href="#">2012</a> | <a href="#">2011</a> | <a href="#">2010</a> | <a href="#">2009</a>                | N/A                  | N/A                  | N/A                  |
| N/A                                 |                      |                      |                      |                                     |                      |                      |                      |
| <u>Wage &amp; Income Transcript</u> |                      |                      |                      |                                     |                      |                      |                      |
| <a href="#">2013</a>                | <a href="#">2012</a> | <a href="#">2011</a> | <a href="#">2010</a> | <a href="#">2009</a>                | <a href="#">2008</a> | <a href="#">2007</a> | <a href="#">2006</a> |
| <a href="#">2004</a>                |                      |                      |                      |                                     |                      |                      |                      |

\* 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."



[Sign Out](#)

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

You selected: **Higher Education/Student Aid**  
We suggest you download: **Return Transcript**

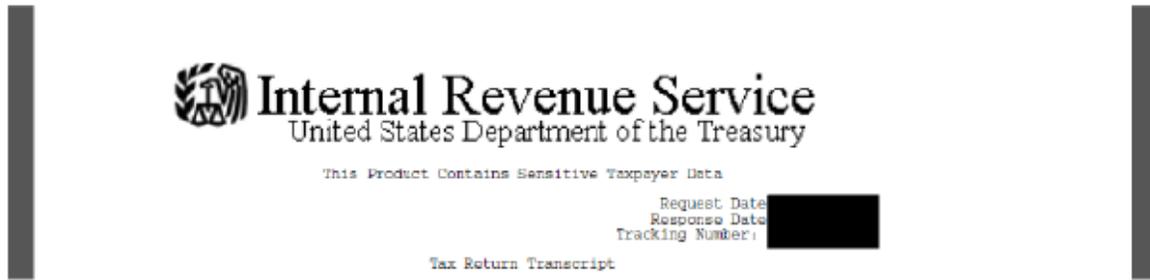
Below are the transcripts and years available.

|                                     |                      |                      |                      |                                     |                      |                      |                      |
|-------------------------------------|----------------------|----------------------|----------------------|-------------------------------------|----------------------|----------------------|----------------------|
| <u>Return Transcript</u>            |                      |                      |                      | <u>Record of Account Transcript</u> |                      |                      |                      |
| <a href="#">2013</a>                | <a href="#">2012</a> | <a href="#">2011</a> | <a href="#">2010</a> | <a href="#">2013</a>                | <a href="#">2012</a> | <a href="#">2011</a> | <a href="#">2010</a> |
| <u>Account Transcript</u>           |                      |                      |                      |                                     |                      |                      |                      |
| <a href="#">2013</a>                | <a href="#">2012</a> | <a href="#">2011</a> | <a href="#">2010</a> | <a href="#">2009</a>                | N/A                  | N/A                  | N/A                  |
| N/A                                 |                      |                      |                      |                                     |                      |                      |                      |
| <u>Wage &amp; Income Transcript</u> |                      |                      |                      |                                     |                      |                      |                      |
| <a href="#">2013</a>                | <a href="#">2012</a> | <a href="#">2011</a> | <a href="#">2010</a> | <a href="#">2009</a>                | <a href="#">2008</a> | <a href="#">2007</a> | <a href="#">2006</a> |
| <a href="#">2004</a>                |                      |                      |                      |                                     |                      |                      |                      |

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

**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.

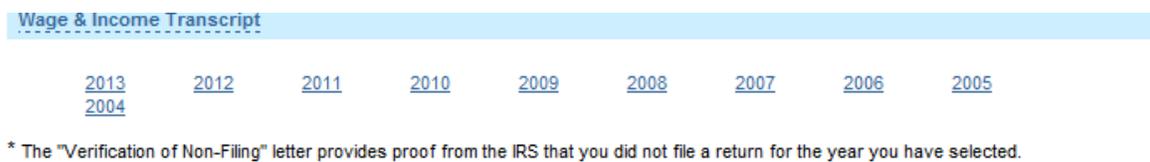
9. After selecting the desired year, you will be directed to a PDF screen generated by the IRS.



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.



IRS Privacy Policy | Privacy Notice

### 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> 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