



## OFFICE OF FINANCIAL AID

### 2020-21 INDEPENDENT STANDARD VERIFICATION WORKSHEET (V1)

- Your 2020-21 Free Application for Federal Student Aid (FAFSA) was selected for a process called verification by the Department of Education.
- Please complete this verification worksheet accurately, review the following instructions carefully and provide all required documentation.
- If any of the information provided below differs from information reported on your 2020-21 FAFSA, we will make the necessary corrections.
- The results of the verification process will be reported on your financial aid award offer.
- **We will not be able to award you federal, state or need-based institutional financial aid until you have provided all the information requested.**

**WARNING: If you purposely give false or misleading information, you may be fined, sentenced to jail or both.**

## STEP 1: STUDENT INFORMATION

STUDENT FULL NAME (PLEASE PRINT) W WOFFORD ID NUMBER XXX-XX-\_\_\_\_ SOCIAL SECURITY NUMBER

## STEP 2: HOUSEHOLD INFORMATION

(USE ADDITIONAL PAPER IF NECESSARY)

**In the chart below, include the following:**

- Yourself.
- Your spouse, if married.
- Your or your spouse's children if:
  - (a) You or your spouse will provide more than half of their support from July 1, 2020-June 30, 2021, even if the children do not live with the student.
  - (b) The children would be required to provide parental information when applying for federal student aid.
- Other people if they now live with you and you or your spouse provides more than half of their support and will continue to provide more than half of their support from July 1, 2020-June 30, 2021.
- Write in the name of the college for any household member who will be attending at least half time between July 1, 2020 and June 30, 2021 and will be enrolled in a degree, diploma or certificate program.

| FULL NAME OF FAMILY MEMBER | RELATIONSHIP TO STUDENT | AGE | NAME OF COLLEGE ATTENDING IN 2020-21 |
|----------------------------|-------------------------|-----|--------------------------------------|
|                            | self                    |     | Wofford College                      |
|                            |                         |     |                                      |
|                            |                         |     |                                      |
|                            |                         |     |                                      |
|                            |                         |     |                                      |
|                            |                         |     |                                      |

## STEP 3: TAX FILING STATUS

### STUDENT

**Did the student and/or spouse file taxes for 2018?**

If **YES**, your tax data must be submitted by one of the methods on page 3.

If **NO**, contact the Financial Aid Office with further instructions on how to obtain a Non-Filing Verification Letter, complete the chart below **AND** submit all 2018 W-2s received.

Please complete this chart if you did NOT file taxes.

| NAME OF STUDENT / SPOUSE | EMPLOYER'S NAME | 2018 IRS W-2 RECEIVED? | 2018 AMOUNT EARNED |
|--------------------------|-----------------|------------------------|--------------------|
|                          |                 |                        |                    |
|                          |                 |                        |                    |
|                          |                 |                        |                    |
|                          |                 |                        |                    |

## STEP 4: CERTIFICATION

By signing this request for consideration of special circumstances, I (we) certify that all information reported on this form is true and correct to the best of my (our) knowledge, **and give permission to Wofford College to make changes to my FAFSA.** *Electronic signatures are not acceptable.*

\_\_\_\_\_  
STUDENT'S SIGNATURE

\_\_\_\_\_  
DATE

\_\_\_\_\_  
SPOUSE'S SIGNATURE (OPTIONAL)

\_\_\_\_\_  
DATE

**We cannot accept emailed or faxed documents because of privacy and security concerns.  
Please use one of the following methods to submit your documentation.**

**SECURE UPLOAD**

forms.wofford.edu  
(Requires student log-in to myWofford.)

**MAIL**

Office of Financial Aid  
Wofford College  
429 N. Church Street  
Spartanburg, S.C. 29303

**IN PERSON**

Hugh S. Black Admin Bldg.  
2nd floor above Admission

## INSTRUCTIONS FOR PROVIDING 2018 TAX DATA

If you have filed a 2018 tax return, we must collect your tax data for verification purposes.

If you have already used the IRS Data Retrieval Tool on the FAFSA, you do not need to supply us with your tax data.

If not, please complete one of the following:

### 1. Directly through the FAFSA \*Preferred Method\*

#### DATA RETRIEVAL TOOL INSTRUCTIONS:

**Step 1:** Log onto [www.fafsa.gov](http://www.fafsa.gov) using your FSA ID and password.

**Step 2:** Select "Make FAFSA Corrections."

**Step 3:** Create a "Save Key" and click next.

**Step 4:** Navigate to the "Financial Information" tab at the top of the page. This takes you to student financial information.

To navigate to parent, scroll to the bottom of the page and click next.

**Step 5:** Verify that answer to "Have you completed your IRS Income tax return" is "Already Completed" in the drop down menu.

**Step 6:** Answer the question regarding your filing status.

**Step 7:** Answer "No" to the next three questions, if no is the correct answer.

**Step 8:** You will be leaving the FAFSA website temporarily. Click "OK."

**Step 9:** Enter the requested information. Click Submit. The information should match what is listed on your 2018 tax return.

**Step 10:** Check the box for "Transfer My Tax Information into the FAFSA" and click "Transfer Now." **Please note: You will not be able to view or change any of the imported tax data.**

**Step 11:** Navigate to the bottom of the page and click "Next."

**Step 12:** Verify your changes and click "Next."

**Step 13:** You will be prompted to sign the FAFSA again. Both a parent and student electronic signature are required if parental information is changed. Click agree and sign at the bottom, then click "SUBMIT MY FAFSA NOW." **Please note: It takes approximately 3 business days for Wofford to receive the updated FAFSA.**

### 2. Submit a SIGNED copy of your 2018 tax return submitted to the IRS (including Schedules 1-6, if applicable).

### 3. Directly from the IRS online at [www.irs.gov](http://www.irs.gov).

#### a. GET TRANSCRIPT BY MAIL:

**Step 1:** Click "Get My Tax Record."

**Step 2:** Click on "Get Transcript by Mail."

**Step 3:** Enter the required information as it appears on your tax return using the information for the primary taxpayer.

**Step 4:** Choose "Return Transcript" under Type of Transcript for the 2018 tax year.

**Step 5:** The tax return transcript will be mailed to the address on your tax return in 5-10 business days. Please keep your original and provide us with a copy.

#### B. GET TRANSCRIPT ONLINE (ONLY AVAILABLE FOR THOSE WHO HAVE AN ACCOUNT ON THE IRS ONLINE SYSTEM):

**Step 1:** Click "Get My Tax Record."

**Step 2:** Click on "Get Transcript Online."

**Step 3:** Log-in as a returning user.

**Step 4:** After logging in, choose "Higher Education/Student Aid" as the reason for your request. Click "Go."

**Step 5:** In the "Return Transcript" section, click 2018. An asterisk beside 2018 means you have filed but the return has not been processed. You will need to try again later.

**Step 6:** A PDF of your tax return transcript will immediately appear on your screen. Print two copies, send one to us and retain one for your records. You may also wish to save this file on your computer.

#### C. REQUEST BY MAIL:

**Step 1:** Go to [www.irs.gov](http://www.irs.gov).

**Step 2:** Click "Get My Tax Record."

**Step 3:** On the right hand side, click on "About Form 4506-T."

**Step 4:** Click "Form 4506-T."

**Step 5:** Complete the form 4506-T, selecting box **6a** and indicating tax year ending 12/31/2018.

**Step 6:** Print, sign and mail or fax the form to the address listed on the back of the form.

**Step 7:** Upon receipt of the tax return transcript, please submit to the Wofford Financial Aid Office.