



## OFFICE OF FINANCIAL AID

### 2020-21 VERIFICATION OF NON-TAX FILING WORKSHEET

- 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

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

## STEP 2: TAX FILING STATUS

\_\_\_\_\_ **YES, my parent(s) filed taxes in 2018:** Follow instructions on page 4 for providing tax data to our office.

NOTE: Remember to sign appropriately on page 3 and submit to the Wofford Financial Aid Office.

\_\_\_\_\_ **NO, my parent(s) did not file taxes in 2018:** Choose the accurate scenario on page 2 and follow the accompanying instructions for providing proof of non-filing status.

**SCENARIO 1: My parent(s) did NOT and will NOT file taxes for 2018:**

If you are the parent and **have NOT filed a 2018 tax return** and do not plan to do so, we must collect a Verification of Non-Filing Letter provided by the IRS. Please request this form using the following instructions:

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

**Step 2:** Type "4506-T" in the search box.

**Step 3:** Choose "Form 4506-T, Request for Transcript of Tax Return" from search results.

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

**Step 5:** Complete the form 4506-T, selecting box 7 and indicate tax year ending 12/31/2018.

**Step 6:** Print, sign, date and mail or fax the form to the address listed on the back of the form. **Retain a copy for your records.**

**Step 7:** Upon receipt of the Verification of Non-Filing, please submit to the Wofford Financial Aid Office along with any W-2 forms issued you for 2018.

If you do not receive the Verification of Non-Filing Letter from the IRS within 10 business days, please complete the section below and submit a copy of the 4506-T along with any W-2's issued you in 2018 to our office.

I, \_\_\_\_\_, have attempted to retrieve a Verification of Non-Filing Letter from the IRS. As of the date on this form, it has not been received. I have not filed a federal tax return for 2018 nor am I required to do so.

Enter below any sources of income received in 2018.

NAME OF PARENT	EMPLOYER'S NAME	2018 IRS W-2 RECEIVED?	2018 AMOUNT EARNED

**PLEASE NOTE: If you earned more than the IRS threshold required to file, you will be asked to file your taxes. We cannot complete verification until this is completed.**

**SCENARIO 2: My parent(s) did NOT file taxes for 2018 but WILL file:**

If you are the parent and **have NOT filed a 2018 tax return** but you plan to do so, we must collect proof of an IRS-approved extension along with other documentation. Please provide the following documentation:

**Item 1:** A copy of IRS Form 4868, Application for Automatic Extension of Time to File US Individual Tax Return.

**Item 2:** A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2018.

**Item 3:** Verification of non-filing from the IRS dated on or after October 1, 2019 (see Scenario 1 for instructions).

**Item 4:** Copies of all W-2 forms (or equivalent) for 2018.

**Item 5:** If self-employed, a signed statement with the amounts of your AGI and U.S. income tax paid for 2018.

If you need further assistance requesting the information from the IRS website, please contact them by phone at 1-800-908-9946.

### STEP 3: CERTIFICATION

By signing this worksheet, we certify that all of the information reported above is true, complete and correct. Electronic signatures are not acceptable.

STUDENT'S SIGNATURE

DATE

SIGNATURE OF ONE PARENT LISTED ON THE FAFSA

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 1-3, 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.