



OFFICE OF FINANCIAL AID
2022-23 DEPENDENT AGGREGATE VERIFICATION WORKSHEET (V5)

- Your 2022-23 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 2022-23 FAFSA, the Office of Financial Aid 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 parent(s)/step-parent(s) (do not include non-custodial parent).
- Your parents other children if:
 - (a) The parents/step-parents will provide more than half of their support from July 1, 2022-June 30, 2023.
 - (b) The children would be required to provide parental information when applying for federal student aid.
- Other people if they now live with your parents/step-parents, and your parents/step-parents provide more than half of their support and will continue to provide more than half of their support from July 1, 2022-June 30, 2023.
- Write in the name of the college for any household member (except parents/step-parents) who will be attending at least half time between July 1, 2022 and June 30, 2023, and will be enrolled in a degree, diploma or certificate program.

FULL NAME OF FAMILY MEMBER (AS OUTLINED ABOVE)	RELATIONSHIP TO STUDENT	AGE	NAME OF COLLEGE ATTENDING IN 2022-23
	self		Wofford College

STEP 3: TAX FILING STATUS (COMPLETE BOTH STUDENT AND PARENT SECTIONS.)

STUDENT

Did the student file taxes for 2020?

YES: The student filed taxes (student tax data must be submitted by one of the methods on page 6).

NO: The student worked but did not file taxes (student must complete the chart below and submit 2020 W-2's).

NO: The student did not work nor file taxes in 2020.

PARENT

Did one or both parents listed on the previous page file a 2020 tax return? **YES** **NO**

If **YES**, follow the instructions on page 6 to submit your tax data.

If **NO**, please complete the chart below **AND** submit all 2020 W-2s received. Contact the Office of Financial Aid for further instructions on how to obtain a Non-Filing Verification Letter.

Please complete this chart if you worked and did NOT file taxes.

NAME OF STUDENT / PARENT	EMPLOYER'S NAME (N/A IF NOT EMPLOYED)	2020 IRS W-2 RECEIVED? (YES OR NO)	2020 AMOUNT EARNED

STEP 4: IDENTITY AND STATEMENT OF EDUCATIONAL PURPOSE INSTRUCTIONS

Identity and Statement of Educational Purpose

The student **MUST appear in person at the Wofford College Financial Aid Office** to verify his or her identity by presenting an unexpired, valid government-issued photo identification (ID), such as, but not limited to, a driver's license, other state-issued ID or passport. The institution will maintain a copy of the student's photo ID that is annotated with the date it was received and the name of the official at the institution authorized to collect the student's ID.

In addition, the student must sign, **in the presence of the institutional official**, the **Statement of Educational Purpose** provided on page 4.

If the student is unable to appear in person at the Wofford College Financial Aid Office to verify his/her identity, the student must provide to the institution:

Identity and Statement of Educational Purpose (to be signed in the presence of a notary)

- A. A copy of the unexpired valid government-issued photo identification (ID) that is acknowledged in the notary statement below or that is presented to a notary, such as, but not limited to, a driver's license, other state-issued ID or passport.
- B. The original Statement of Educational Purpose on page 4, which must be notarized. **If the notary statement appears on a separate page than the Statement of Educational Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized.**

(Continued on page 4.)

**Statement of Educational Purpose
(to be signed at the institution or with a notary)**

I certify that I _____ am the individual signing this Statement of Educational Purpose and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Wofford College for 2022-23.

PRINT STUDENT'S NAME

STUDENT'S SIGNATURE

DATE

STUDENT'S ID #

Notary's Certificate of Acknowledgement

State of _____

City/County of _____

On _____, before me, _____

DATE

NOTARY'S NAME, PRINTED

personally appeared, _____, and proved to me on the

PRINTED NAME OF SIGNER

basis of satisfactory evidence of identification _____

TYPE OF UNEXPIRED GOVERNMENT-ISSUED PHOTO ID PROVIDED

to be the above named person who signed the foregoing instrument.

WITNESS my hand and official seal

NOTARY SIGNATURE

My commission expires on _____.

DATE

OFFICE USE ONLY FOR STATEMENT OF IDENTIFICATION

I attest that the individual named above appeared in person and verified his/her identity with the valid, government issued ID copied above.

PRINT NAME

DATE

SIGNATURE

TITLE

STUDENT'S NAME

WOFFORD ID:

STEP 5: CERTIFICATION

By signing this worksheet, we certify that all of the information reported on this form is true, complete and correct, and give permission to Wofford College to make applicable changes to my FAFSA. Electronic signatures are not acceptable.

STUDENT'S SIGNATURE (ELECTRONIC SIGNATURES NOT ACCEPTABLE)

DATE

PARENT SIGNATURE (ELECTRONIC SIGNATURES NOT ACCEPTABLE)

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.**

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 2020 TAX DATA

If you have **filed a 2020 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 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 2020 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 2020 tax return submitted to the IRS (including Schedules 1-3 and Schedule C, if applicable).

3. Directly from the IRS online at 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 2020 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 2020. An asterisk beside 2020 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.

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 12/31/2020.

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.