



OFFICE OF FINANCIAL AID
2023-24 INDEPENDENT AGGREGATE VERIFICATION WORKSHEET (V5)

- Your 2023-24 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 2023-24 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

| | | |
|----------------------------------|-------------------|------------------------|
| | W | XXX-XX-____ |
| STUDENT FULL NAME (PLEASE PRINT) | WOFFORD ID NUMBER | 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, 2023-June 30, 2024, 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, 2023-June 30, 2024.
- Write in the name of the college for any household member who will be attending at least half time between July 1, 2023 and June 30, 2024 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 2023-24 |
|---|----------------------------|-----|---|
| | self | | Wofford College |
| | | | |
| | | | |
| | | | |
| | | | |
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STEP 3: TAX FILING STATUS

STUDENT

Did the student and/or spouse file taxes for 2021?

If **YES**, your tax data must be submitted by one of the methods on page 5.

If **NO**, please complete the chart below **AND** submit all 2021 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 did NOT file taxes.

| NAME OF STUDENT / SPOUSE | EMPLOYER'S NAME (N/A if not employed) | 2021 IRS W-2 RECEIVED? (Yes or No) | 2021 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 3.

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 3, 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 3.)

**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 2023-24.

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

STEP 5: CERTIFICATION

By signing this worksheet, I 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

SPOUSE'S SIGNATURE (OPTIONAL)
(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.**

SECURE UPLOAD

<https://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 2021 TAX DATA

If you have **filed a 2021 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 2021 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 2021 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 Your 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 2021 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.

4. Directly from ID.me (Return Transcript, Record of Account Transcript, Account Transcript, Wage & Income Transcript).

Step 1: Open ID.me in your browser.

Step 2: Click "Learn More: in Internal Revenue Service block.

Step 3: Click "Connect with ID.me" in Internal Revenue Service block.

Step 4: Click "Sign in to Your Account" and then again on the next page. **Jump to step 10** if you have an existing account.

Step 5: Click "Create an account" to create account if you **do not** have an existing account.

Step 6: Enter your email, create and confirm a password. You will get an email confirming the email address.

Step 7: Choose a multi-factor (MFA) option. You will get a six digit code sent to the MFA option you entered (ie. a text to your cell).

Step 8: Generate a Recovery Code and record in a secure location.

Step 9: Choose how you verify your identity*:

- Self Service (fastest option, requires one identity document passport, DL, state ID and a selfie).
- Video Chat Agent (must have two identity documents available)
- * Follow instructions carefully. Have identity documents ready. You will be asked to share personally identifiable information such as SSN.

Step 10: After you have created your account or logged into an existing account, a screen will pop up showing the dashboard for your account.

Step 11: Click View Tax Records in the Records block.

Step 12: On the Tax Records page, click Get Transcript. Select Higher Education/Student Aid for the reason for transcript. Choose 2021 for tax year under the transcript requested by our office. The transcript will be displayed on the screen and can be printed or downloaded to your computer.