



OFFICE OF FINANCIAL AID
2023-24 INDEPENDENT VERIFICATION
OF NON-TAX FILING WORKSHEET

- 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: TAX FILING STATUS

_____ **YES, I and/or my spouse filed taxes in 2021:** 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, I and/or my spouse did not file taxes in 2021:** Choose the applicable scenario on page 2 and follow the accompanying instructions for providing proof of non-filing status.

SCENARIO 1: Did NOT and will NOT file taxes for 2021:

If you are the student and/or spouse, and **have NOT filed a 2021 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.

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." (*Note this form is required for both the student and/or spouse if applicable.*)

Step 5: Complete the form 4506-T, selecting box 7 and indicate tax year ending 12/31/2021.

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 2021.

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 2021 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 2021 nor am I required to do so.

Enter below any sources of income received in 2021.

NAME OF STUDENT AND/OR SPOUSE	EMPLOYER'S NAME (N/A if not employed)	2021 IRS W-2 RECEIVED? (Yes or No)	2021 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: Did NOT file taxes for 2021 but WILL file:

If you are the student and/or spouse and **have NOT filed a 2021 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 2021.

Item 3: Verification of non-filing from the IRS dated on or after October 1, 2021 (see Scenario 1 for instructions).

Item 4: Copies of all W-2 forms (or equivalent) for 2021.

Item 5: If self-employed, a signed statement with the amounts of your AGI and U.S. income tax paid for 2021.

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, 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

SIGNATURE OF SPOUSE (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.