

Instructions for Requesting Tax Return Documents

2021-2022

There are three options tax filers may satisfy this requirement, which do not involve payment of a fee.

1. Use the **Data Retrieval Tool (DRT)** when completing the FAFSA online. Further instructions can be found at <https://wofford.edu/financialaid>. ***Preferred Method***

2. Retrieve 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 is appears on your tax return using the information for the primary taxpayer.

Step 4: Choose **Return** Transcript under Type of Transcript for the 2019 Tax Year.

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

The customer file number is optional

B. Get Transcript Online (this is 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 2019. An asterisk beside 2019 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. Use form 4506-T

Step 1: Go to www.irs.gov.

Step 2: Click “Get My Tax Record”

Step 3: At the bottom of the page, click on “About Form 4506-T”.

Step 4: Click “Form 4506-T”

Step 5: Check box **6a**.

Step 6: Enter 12/31/2019 for the tax year to receive the 2019 record.

Step 7: Print, sign, and mail the form to the address listed on the back of the form. **Keep a copy for your records.**

Step 8: Upon receipt of the tax return transcript, please submit to the Wofford Financial Aid Office.

3. Submit a **SIGNED** copy of the 1st two pages of your 2019 tax return submitted to the IRS.

Note: Submit via secure upload to <https://forms.wofford.edu>, mail to the address below or deliver in person. Email is not acceptable.

Office of Financial Aid
WOFFORD COLLEGE
429 North Church Street, Spartanburg, SC 29303-3663
Phone: 864-597-4160
Email: finaid@wofford.edu