

## Opportunity Scholarship Program Tips for Completing Income Verification 2019-20

**The Opportunity Scholarship Program wants to help families complete the Income Verification process. Use the recommendations below for the quickest Income Verification process.**

1. All documents must be uploaded via [MyPortal](#) by the provided deadline.
2. The Opportunity Scholarship Program cannot accept documents via email or fax.
3. [MyPortal](#) accepts documents in PDF Format or Word Document Format, but not Picture Files.
4. The documents you submit are *federal* tax return documents for tax year 2018.

### Income Verification FAQ

#### How do I start?

1. Sign on to [MyPortal](#). Click on the To Do list. The first step for Income Verification is to complete the online worksheet. Be careful and respond accurately; mistakes will delay your Income Verification.
2. As soon as you have submitted the online Income Verification Worksheet, check the To Do list again. There will now be additional Action Items on the To Do list.

#### What are the documents?

Most people will submit two documents: The 2018 Tax Return Transcript and the 2018 Wage and Income Transcript. Remember that these are federal tax documents for tax year 2018. The Opportunity Scholarship Program needs these documents for every adult in the household who filed a tax return for 2018.

#### I have a paper copy of my tax return. Can I send that to you?

No. Go to the online IRS site, [www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript), and request the free electronic copy of (1) the Tax Return Transcript and (2) the Wage and Income Transcript. Each member of your household who filed a tax return needs to do this.

#### If I have more than one student, should I upload the files to all of their records?

No. You only need to submit *one* copy of documents required for Income Verification. Submit them through the To Do list of your [MyPortal](#) account. When we review the documents for Income Verification, we apply the results of the review to all of the students associated with the parent.

#### I didn't file taxes.

Complete and submit the electronic Income Verification Worksheet. You will then see an electronic Non-Filer Form on your To Do list in [MyPortal](#) after you submit the Income Verification Worksheet listing the household members who did not file taxes. Complete the Non-Filer Form and submit. Stay tuned, because the Opportunity Scholarship Program may need additional documents from you.

#### What should I do if I filed for an extension and my taxes aren't complete?

Email [OpportunityScholarships@ncseaa.edu](mailto:OpportunityScholarships@ncseaa.edu) to explain. We will make a note in your student's record and provide a link where you can upload a copy of the "Application for Automatic Extension of Time To File U.S Individual Income Tax Return" (Form 4868). This will extend the time you have to complete the Income Verification process. We will not release any funds to a student's school until Income Verification is successfully completed, thus your student's award will be on hold.

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### **I made a mistake!**

If you made an error on any of the electronic forms, or if you uploaded the incorrect tax return document, contact [OpportunityScholarships@ncseaa.edu](mailto:OpportunityScholarships@ncseaa.edu). Don't call; we will need an email from you to fix errors.

### **Should I still complete the other Opportunity Scholarship processes during Income Verification?**

Yes. If you are planning to use the award offer for the 2019-20 school year, you should go ahead and accept the award for each student in your [MyPortal](#) account. Also, make sure each student's nonpublic school choice is correct (check School Choice in [MyPortal](#)).

### **How do I know if you got my documents?**

As you submit the required documents, your To Do list in [MyPortal](#) checks off the Action Items as complete.

### **How long does it take for Income Verification?**

It depends. If you submit the correct documents the first time, Opportunity Scholarships will complete Income Verification in about 6 weeks. It can take a lot longer if your documents are not complete or correct. The K12 staff at the Opportunity Scholarship Program will review documents one time and complete Income Verification if possible. If necessary, you will have a second chance to upload the correct documents. After that point, staff will either complete Income Verification, or if documents are still incorrect or incomplete, we'll put your student's award on hold to review later when Income Verification is finished for all other households.

### **What other tips do you have for me?**

1. Complete the Income Verification worksheet (the online electronic form) as soon as possible, but be careful and respond accurately.
2. **Don't wait** to go to [www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript) to request **electronic** copies of your Tax Return Transcript and Wage and Income Transcript.
3. If you wait until the last minute you'll be last in line for us to review your documents. We review documents in the order that the correct documents have been received completely.
4. We'll review your documents the first time and let you know if information is missing. You'll have one more chance to upload correct documents. Deadlines matter, so respond quickly.
5. Log into [MyPortal](#) **weekly** to monitor the Income Verification process. Check your email **every day**. If you think you've missed an email from Opportunity Scholarships, check the Notifications region in [MyPortal](#). Copies of the emails we've sent you are in [MyPortal](#).

### **Does this guide cover *everything* that I need to do for Income Verification?**

Maybe not everything. Everyone's household income situation and taxes are unique. If you have a specific question that relates to your situation, send us an email at [OpportunityScholarships@ncseaa.edu](mailto:OpportunityScholarships@ncseaa.edu) and we'll help.

Thank you,

Opportunity Scholarship Program Staff