

Opportunity Scholarship Program Tips for Completing Income Verification 2021-22

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

1. Upload all documents to [MyPortal](#) by the provided deadlines.
2. Documents cannot be accepted by email or fax.
3. [MyPortal](#) accepts PDF or Word documents, but not Picture Files.
4. Federal Tax Documents for 2020 are requested.

Income Verification FAQ

How do I start?

1. Go to your To Do List on MyPortal and complete the "Income Verification Worksheet". Respond accurately, entering incorrect information could cause delayed school payment.
2. After submitting the worksheet, check the To Do List again. There will be new action items.

What are the documents?

Most people will submit the [2020 Tax Return Transcript](#). This is needed for every household member who filed a 2020 tax return. Go to www.irs.gov/individuals/get-transcript to request your [2020 Tax Return Transcript](#).

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

No. The Program will not accept tax return forms and/or W2s. Go to www.irs.gov/individuals/get-transcript to request your [2020 Tax Return Transcript](#).

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

No. Submit documents one time to your To Do List on MyPortal. Upon review, the information will be applied to all students listed on your account.

I am not required to file taxes.

After you complete the Income Verification Worksheet, there will be a Non-Filer form on your To Do List on MyPortal. This form is for household members who earned income but were not required to file taxes.

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

1. Complete the Income Verification Worksheet and select "Yes" for "Did this person file a 2020 tax return?", if you have not done so already.
2. Email OpportunityScholarships@ncseaa.edu to explain. We will request a copy of your "Application for Automatic Extension of Time To File U.S Individual Income Tax Return" (Form 4868). This form is due by October 1 and will extend your deadline to complete the Income Verification process. Funds cannot be released until this process is completed.
3. A Tax Return Transcript is due by December 1, or the award offer will be cancelled.

I made a mistake!

If you made an error on an electronic form or uploaded an incorrect document, email OpportunityScholarships@ncseaa.edu. Don't call; we will need an email from you to correct errors.

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

Yes. Please go on MyPortal to accept the award offer and confirm/update the school choice for each student.

How do I know if you got my documents?

Action items on your To Do List on MyPortal are checked off after you submit documents.

How long does it take for Income Verification?

It depends. The process can be completed in about 6 weeks if all forms are submitted by the provided deadlines. Extensions and resubmits are not guaranteed, so please complete the process as accurately and timely as possible.

What other tips do you have for me?

1. Complete the Income Verification Worksheet as soon as possible. Remember to respond accurately.
2. Don't wait! Go to www.irs.gov/individuals/get-transcript and request an electronic copy of your 2020 Tax Return Transcript.
3. We review documents in the order that they are received. After your documents are reviewed, we will email you if information is missing.
4. Deadlines are important, so **check your email daily** and respond quickly. Copies of the emails we've sent are also visible in the "Notifications" section on MyPortal.
5. **Check your To Do List on MyPortal weekly** for new steps.

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 relate to your situation, email OpportunityScholarships@ncseaa.edu and we'll help!

Thank you,

Opportunity Scholarship Program Staff