

Form and Document Submission Guidelines

Please only submit documents that are requested and applicable to you. Documents may be submitted to our office via fax, email, postal mail, or in person. For security purposes **federal and/or state income tax information should not be sent via email or fax**. Communications sent via email over the internet **are not secure**.

IRS Tax Transcript Submission

The Internal Revenue Service (IRS) has recently changed the format of tax transcripts to protect taxpayers from unauthorized use of taxpayer data. The new format redacts all personally identifiable information (PII) and some public record information. Because of this, all tax transcripts that are sent to our office **MUST** include the student's name and Converse ID on the top of each page of the transcript. Where applicable, parent or spouse's name should also be written on the tax transcript in addition to the student's name and Converse ID. Without this information, our office cannot identify the owner of the tax transcript or document and confirm receipt of the transcript.

Important Note: Starting in January 2019, IRS tax transcripts can **no longer** be sent to our office from the IRS via mail or fax. Please visit [IRS.gov](https://www.irs.gov) for alternative options.

Fax Submission Guidelines

- Student's name and Converse ID must be clearly written at the top of all documents
- Personally Identifiable Information (PII) such as social security number, date of birth, etc., must be redacted or removed from the document unless specifically requested by the Financial Planning Office to continue process aid requests.
- Verify that all documents are legible and the appropriate signatures (handwritten) and dates are included
- Send all verification documents to 864-596-9749.

Email Submission Guidelines

- Student's name and Converse ID must be clearly written at the top of all documents
- Please send one PDF, TIF, or JPG file for each document or form (PDF is preferred). **Images must be attached. They cannot be embedded in the body of the email.**
- Personally Identifiable Information (PII) such as social security number, date of birth, etc., must be redacted or removed from the document unless specifically requested by the Financial Planning Office to continue process aid requests.
- Social security numbers **should never** be included in the subject or body of an email.
- We cannot accept compressed, zipped, password protected files and/or login credentials to an FTP site.
- Verify that all documents are legible and the appropriate signatures (handwritten) and dates are included.

- Send all verification, loan documents, and forms to financial.planning@converse.edu. **Federal and/or state tax information should NOT be sent via email. Email communications sent via the internet are not secure.**

Postal Mail Submission

- Student's name and Converse ID must be clearly written at the top of all documents
- Personally Identifiable Information (PII) such as social security number, date of birth, etc., must be redacted or removed from the document unless specifically requested by the Financial Planning Office to continue process aid requests.
- Verify that all documents are legible and the appropriate signatures (handwritten) and dates are included.
- Please submit all documents without staples, paperclips, etc.
- Send all documents to:

Financial Planning Office
Converse College
580 East Main Street
Spartanburg, SC 29302

In-Office Submission

- Student's name and Converse ID must be clearly written at the top of all documents
- Personally Identifiable Information (PII) such as social security number, date of birth, etc., must be redacted or removed from the document unless specifically requested by the Financial Planning Office to continue process aid requests.
- Verify that all documents are legible and the appropriate signatures (handwritten) and dates are included.
- Please submit all documents without staples, paperclips, etc.
- Office Hours and Location:

Wilson Hall, East, 3rd Floor

Monday – Friday, 8:30 a.m. – 5:00 p.m. (hours may be subject to change due to campus events, training, etc.)