



**C. VERIFICATION OF STUDENT INCOME****INCOME INFORMATION – STUDENT**

Check the box that applies:

I **did not work** in 2016 and I **did not and am not required to** file a 2016 Federal Income Tax Return.  
**Required Documentation:** Proof of Non-Filing (instructions included on last page)

I **did work** in 2016 and **was not required** to file a 2016 Federal Income Tax Return.  
**Required Documentation:**

- Proof of Non-Filing (instructions included on last page)
- Copies of all 2016 Federal W-2 income statements
- List employer name and amount earned in 2016 in chart below (include a separate page if additional space is needed)

Name of Employer	2016 Amount Earned

I **did work** and **have filed** a 2016 Federal Income Tax Return.

**Required Documentation:**

- 1) IRS Data Retrieval **or** Tax Transcript (instructions included on last page)
- 2) **If you rolled** any portion of a distribution from pensions, annuities, profit sharing, IRAs and or retirement plans you must submit the 1099–R form.

**D. VERIFICATION OF SPOUSES INCOME (if married please complete this section)****INCOME INFORMATION – SPOUSE**

Check the box that applies:

My spouse **did not work** in 2016 and **did not file** a 2016 Federal Income Tax Return.  
**Required Documentation:** Proof of Non-Filing (instructions included on last page)

My spouse **did work** in 2016 and **was not required** to file a 2016 Federal Income Tax Return.  
**Required Documentation:**

- Proof of Non-Filing (instructions included on last page)
- Copies of all 2016 Federal W-2 income statements
- List employer name and amount earned in 2016 in chart below (include a separate page if additional space is needed)

Name of Employer	2016 Amount Earned

My spouse **did work** and **have filed** a 2016 Federal Income Tax Returns.

**Required Documentation:**

- 1) IRS Data Retrieval **or** Tax Transcript (instructions included on last page)
- 2) **If you rolled** any portion of a distribution from pensions, annuities, profit sharing, IRAs and or retirement plans you must submit the 1099–R form.

**E. CERTIFICATION AND SIGNATURES**

By signing this worksheet, each person certifies that all the information reported is complete and correct and that all required documentation has been attached. **WARNING:** If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to prison, or both.

Student's Signature

Date

Spouse's Signature

Date

## TAX DOCUMENTATION INSTRUCTIONS

If you filed a 2016 federal income return, follow the instructions in section “A” below, **except if:**

- **You filed an amended tax return.** Follow the instructions in section “B” and submit a **signed** copy of the IRS Form 1040X, "Amended U.S. individual income Tax Return" filed with the IRS.
- **You filed using a status of Married, Filing Separately.** Follow the instructions in section “B” for **both** you and your spouse.
- **You were/are a victim of Identity Theft** and unable to obtain a IRS Tax Return Transcript. Follow the instructions in section “C”.
- **You filed a foreign tax return.** Provide a signed copy of that 2016 income tax return.

### A. IRS DATA RETRIEVAL TOOL

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1. Log into your FAFSA at [www.FAFSA.gov](http://www.FAFSA.gov), select “Make FAFSA Corrections”, navigate to the student and parent financial sections.
2. Under the “Income” sections click “Link to IRS” and you will be transferred to the IRS website
3. On the IRS website, enter all required information to authenticate your identity
4. After verification, your IRS tax information will be displayed. **Select “Transfer My Tax Information into the FAFSA”**
5. Tax information transferred from the IRS will be marked with “Transferred from the IRS” on your FAFSA

#### **STEP-BY-STEP VIDEO INSTRUCTIONS:**

View “IRS Data Retrieval Tool” how-to [video](#).

### B. IRS Tax Return Transcript and Proof of Non-Filing

#### Online/Mail Request

1. Go to [www.irs.gov/transcript](http://www.irs.gov/transcript)
2. Follow the instructions and enter the required data for tax year 2016 to request either a:
  - a. “Tax Return Transcript”
  - b. “Verification of Non-Filing Letter”

#### Paper Request

1. Download and Print the IRS Form 4506-T <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>
2. Complete Form and
  - a. Enter ending date **12/31/2016** on line 9
3. Fax or Mail per instructions on final page
4. Once **you receive** the documentation **from the IRS** please **add the student’s name and Cortland ID number** and submit it to the Financial Aid Office

### C. Identity Theft Victim

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1. Tax filers must obtain a Tax Return Data Base View (TRDBV) transcript by calling the IRS’s Identity Protection Specialized Unit (IPSU) at 1-800-908-4490.
2. Submit to the financial aid office a statement signed and dated indicating that you were a victim of IRS tax-related identity theft and that the IRS has been made aware of the tax-related identity theft.

### D. Financial Aid Form Dropbox Instructions

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1. Go to [www.cortland.edu](http://www.cortland.edu). Drag your mouse cursor to “Tuition/Aid” at the top of the page and select “Forms/Resources”.
2. Select the “Financial Aid Drop Box” link at the top of the page.
3. Login to the Dropbox by entering your **MyRedDragon** username and password.
4. Your student information will be pre-loaded. Select the type of form you are submitting from the drop-down menu under “Forms”. Select “Browse” and choose the correct file to upload from your computer. To upload another file at the same time, check the box “Upload another file” and select the file you want to upload from your computer.
5. Once you have selected all the files you wish to submit, select “Submit Form”.
6. You will receive a confirmation on the next page stating “Thank you. The form was submitted successfully”. You will also receive a confirmation e-mail within 30 minutes of your submission.