



Financial Aid Office  
 Submit form:  
[Document Submission Portal](#) or by mail  
 PO Box 2000, Cortland, NY 13045-0900

## 2019-2020 Independent Verification Worksheet

Your FAFSA has been selected for verification. In this process, SUNY Cortland will verify information from your FAFSA with this worksheet and any other required documents. If there are differences between your FAFSA information and your financial documents, corrections will be made to your FAFSA.

### Section A: Student Information

_____	_____	_____	C00 _____
Last Name	First Name	MI	Cortland ID Number
_____		_____	_____
Address		City	State ZIP Code
_____		_____	_____
Email Address		Phone Number	Date of Birth

### Section B: Household Information

List all individuals in your household. Please include:

- Yourself
- Your spouse (if you are married)
- Your children (if applicable) or individuals you currently provide and will continue to provide more than half of their support from July 1, 2019 through June 30, 2020.

Full Name	Age	Relationship to Student	College Attending 2019-2020 (at least half time)
Missy Jones (example)	18	<i>Sister</i>	<i>Central University</i>
		<i>Self</i>	<i>SUNY Cortland</i>

### Section C: Student Income Information

Check the box that applies:

I **did not work** in 2017 and **did not file** a 2017 Federal Income Tax Return.  
**Required Documentation:** Proof of Non-Filing (instructions included on last page)

I **did work** in 2017 and **was not required** to file a 2017 Federal Income Tax Return.  
**Required Documentation:**

- Proof of Non-Filing (instructions included on last page)
- Copies of all 2017 Federal W-2 income statements
- List employer name and amount earned in 2017 in chart below

Name of Employer	2017 Amount Earned

I **did work** and **have filed** a 2017 Federal Income Tax Return.

**Required Documentation:**

- IRS Data Retrieval **or** Tax Transcript (instructions included on last page)
- **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

### Section D: Spouse Income Information

Check the box that applies:

My Spouse **did not work** in 2017 and **did not file** a 2017 Federal Income Tax Return.  
**Required Documentation:** Proof of Non-Filing (instructions included on last page)

My Spouse **did work** in 2017 and **was not required** to file a 2017 Federal Income Tax Return.  
**Required Documentation:**

- Proof of Non-Filing (instructions included on last page)
- Copies of all 2017 Federal W-2 income statements
- List employer name and amount earned in 2017 in chart below

Name of Employer	2017 Amount Earned

My spouse **did work** and **has filed** a 2017 Federal Income Tax Returns.

**Required Documentation:**

- IRS Data Retrieval **or** Tax Transcript (instructions included on last page)
- **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

#### 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. **At least one parent whose information was reported on the FAFSA must sign and date. Physical signature is required; electronic signatures will not be accepted.**

Student's Signature

Date

Spouse's Signature

Date

## TAX DOCUMENTATION INSTRUCTIONS

If you filed a 2017 Federal Income Tax 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 an IRS Tax Return Transcript. Follow the instructions in section “C”
- **You filed a foreign tax return.** Provide a signed copy of that 2017 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,” go to student/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

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#### 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 2017 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 **12/31/2017** 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. Document Submission Portal 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 “Document Submission Portal” link at the top of the page.
3. Login to the Document Submission Portal 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.