IRS DATA RETRIEVAL PROCESS or TAX RETURN TRANSCRIPT PROCESS

You are required to submit your IRS tax information using either the FAFSA IRS Data Retrieval Process or by requesting a Tax Return Transcript from the IRS, per federal regulations. (2018 tax information for 2021 academic year.) Tax returns must have been submitted to and processed by the IRS to be able to use the IRS Data Retrieval Tool, or to request the Tax Return Transcript.

**If you have filed an Amended tax return, or you have had an Identity Theft, please contact the Financial Aid Office. *
*Do NOT submit the Tax Account Transcript. *State Tax Returns are NOT required or accepted for federal verification.

IRS DATA RETRIEVAL PROCESS: (the recommended method)

- Go to the FAFSA website at studentaid.gov/h/apply-for-aid/fafsa
- In Returning User area click on the 'Login' button.
- In the Login window, indicate if you are the student or the parent/preparer, or student from a Freely Associated State, then click 'Next'.
- Enter the required information in the Student Login box (student's FSA ID username, e-mail address, or mobile number}; Click 'Next'.
- Accept the access and use disclaimer.
- If you have completed more than one FAFSA, there will be a tab for each application (eg: 2019-2020, 2020-21 etc). Click on the tab of the FAFSA you want to update.
- Click on the 'Make FAFSA Corrections' link.
- You will be prompted to enter your PIN and 'Create a password', then click 'Next'.
- Click on the 'Financial Information' tab. This takes you to the Parent Financial Information section.
- If you have not already updated the filing status, you will need to do so. Change from 'Will file' to 'Already completed'.
- Answer the questions to see if you are eligible to use the IRS Data Retrieval Tool.
- If you are eligible to use the IRS Data Retrieval Tool, the box at the bottom will state, "Based on your response, we recommend that you transfer your information from the IRS into this F AFSA."
- Select which parent is providing information on the F AFSA from the drop-down box, then enter your PIN.
- Click on 'Link to IRS'.
- Click 'OK' for 'Leaving FAFSA on the Web'.
- Click 'OK' for 'Gov't System is for Authorized Use Only'.
- Review information displayed on the Get My Federal Income Tax Information. Enter the address information. This must exactly match what was used on the tax returns. Click 'Submit'.
- Review the information displayed, then click on the checkbox next to 'Transfer My Tax Information into the FAFSA', and then click on the 'Transfer Now" button.
- Click 'Next' at the bottom of the page.
- On the Sign & Submit page, click on the correct parent that is signing the F AFSA update. (Parent 1 or Parent 2)
- Enter the PIN.
- Click on ' Agree' to 'Terms of Agreement - Parent'.
- Click on 'SUBMIT MY FAFSA NOW'.
- A confirmation page will appear. You may print this page for your records. Click 'Exit' at the bottom of the page when finished.

Once you have transferred the IRS data into the F AFSA, do not make any manual adjustments to the income information on the FAFSA. It will invalidate the data retrieval and an IRS Tax Return Transcript will then be required.

Updated FAFSAs are usually received by Cal Poly within 2-3 business days, and if the IRS Data Retrieval was successful, the Tax Transcript checklist item will be removed from the To-Do list shortly thereafter. If your IRS Data Retrieval has not been removed from your To-Do list 3-4 business days after submitting the change to your FAFSA, you may try to update again and/or contact the F AFSA help line to verify that the update was successfully transmitted: 800-433-3243.

TAX RETURN TRANSCRIPT:

If you cannot use the IRS Data Retrieval on the FAFSA, a Tax Return Transcript can be requested or downloaded and printed from the IRS Web site at www.irs.gov. You may also use the shortcut link to take you to the 2nd step: http://www.irs.gov/Individuals/Get-Transcript

1. Go to www.irs.gov
2. Under Tools, click on "Get Your Tax Record".
3. To Request Online, click on "Get Transcript Online" OR
    to Request by Mail, click on "Get Transcript by Mail".

4. Click on "OK" to agree to "authorized use only" statement.

    For "Request by Mail"
        A. Enter SSN or ITIN, DOB (Day, Month, Year), street address, and zip code in the designated fields
        B. Click 'Continue'.
        C. In the Type of Transcript drop down, select Return Transcript.
        D. In the Tax Year drop down, select 2018 (for 2020-2021 academic year verification purposes).
        E. Click 'Continue'.
        F. Click 'Exit'.
    For "Request Online"
        A. On the login screen, click on "Sign Up" (if you are a returning user, enter the Username in the "Login" area and
            click on 'Log In", skip Step B).
        B. Follow all of the steps to create an account.
        C. Once you have logged-in/ created your account (entered personal info, answered the security questions), enter the
            required information in the fields provided (SSN, DOB, filing status, mailing address, email address, personal
            account number, cell phone #)
        D. In the Return Transcript choices, click on the 2018 tax year.
        E. Be sure to unblock pop-ups from your browser. You may click on "Allow once" or under "Options for this site" you
            may click on " Always allow". 1his appears differently on different browsers.
        F. Print the transcript that pops up on your screen, it will say Tax Return Transcript in the header area.

If you have trouble with the website, contact the IRS at: 800-829-1040.

Submit all pages of the report(s) to the Cal Poly Financial Aid Office: financialaid@calpoly.edu or Fax: 805-756-7243. Include student's name and Cal Poly Empl ID on all documents (found on the Personal Info tab of the student's My Cal Poly portal)

**PLEASE NOTE: Mailed reports are printed double-sided and we need the complete report for review. When sending sensitive information electronically, we highly encourage the use of file encryption.

REQUEST W-2/1099 INFORMATION from the IRS (the information your employer reported to IRS from your W-2 earnini;;s /withholdings): WAGE & INCOME TRANSCRIPT by submitting the 4506-T form.
1. Go to www.irs.gov
2. Click on "Get Your Tax Record".
3. In the Related Forms area in the lower part of the webpage click on "About Form 4506-T".
4. In the Current Revision area, click on "Form 4506-T (PDF)".
5. Fill out the form online, check box Number 8 to receive the Wage and Income Transcript.
6. In Number 9, the Year or period requested should be: 12/31/2018 for the 2020-2021 academic year.
7. Check the attestation clause box just above the signature box.
8. Once form is filled out: print, sign & mail the request to the IRS as instructed, (see the chart information on pg 2).
9. If you have trouble with the website, contact the IRS at: 800-829-1040.
10. Submit all pages to the Cal Poly Financial Aid Office: Fax: 805-756-7243 or email: financialaid@calpoly.edu
Include student's name and Cal Poly Empl ID on all documents (found on the Personal Info tab of the my.calpoly portal)