CAL POLY

TAX INFORMATION SUBMISSION INSTRUCTIONS

Federal regulations require some financial aid applicants to submit IRS tax information using either the FAFSA's integrated **IRS Data Retrieval tool** *or* by **requesting a Tax Return Transcript from the IRS**. 2021 tax information is required for the 2023-24 academic year. Tax returns must have been submitted to and processed by the IRS before applicants can use the IRS Data Retrieval Tool or request the Tax Return Transcript.

- Do NOT submit the federal Tax Account Transcript.
- Do NOT submit any element of a state tax return.
- **If you have filed an amended tax return, are a victim of identity theft, or are having difficulty with either of the submission options, please contact the Financial Aid Office for assistance at financialaid@calpoly.edu.**

Option 1: Utilize the IRS Data Retrieval Tool (recommended)

- Navigate to the FAFSA website at studentaid.gov/h/apply-for-aid/fafsa.
- In the Returning User area click on log in.
- Indicate if you are the student, a parent or a preparer

- If you're the **student**, click "Log In to Continue".

Tell us about yourself.

I am a student and want to access the FAFSA form.

Log In to Continue

Create an FSA ID

or

Use personal identifiers to access the FAFSA form.

- Enter your login information and password and click "Log In".
- You may need to complete the Two-Step Verification to continue.
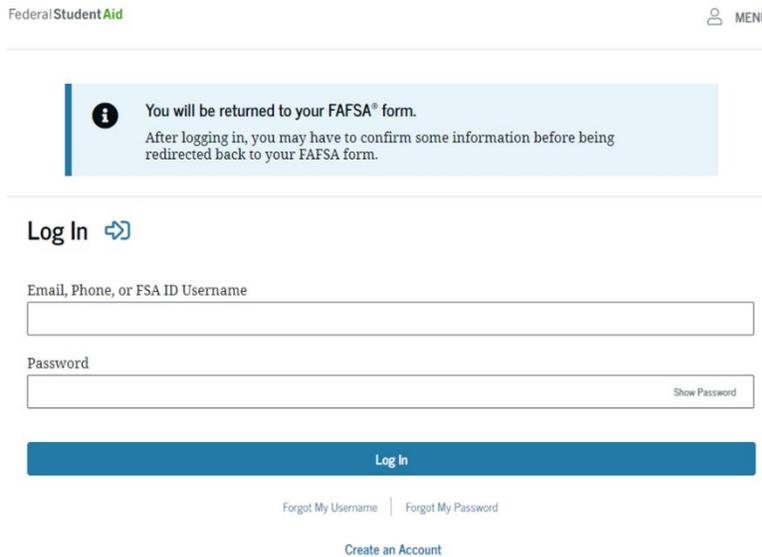
Federal Student Aid   MENU

ℹ You will be returned to your FAFSA® form.
After logging in, you may have to confirm some information before being redirected back to your FAFSA form.

Log In

Email, Phone, or FSA ID Username

Password   Show Password

Log In

Forgot My Username | Forgot My Password

Create an Account

- If you're a **parent** click "I am a parent….".   If you're a **preparer**, click "I am a preparer…."

Tell us about yourself.   ⑦ Help   ⤴ Exit FAFSA Form

○ I am a student and want to access the FAFSA form.

○ I am a parent filling out a FAFSA form for a student.

○ I am a preparer helping a student fill out his or her FAFSA form.

- Enter the required student information: First name, last name, DOB, SSN.

• Click "Continue"

Please Read Before Continuing

You are accessing a U.S. Federal Government computer system intended to be solely accessed by individual users expressly authorized to access the system by the U.S. Department of Education. Usage may be monitored, recorded, and/or subject to audit. For security purposes and in order to ensure that the system remains available to all expressly authorized users, the U.S. Department of Education monitors the system to identify unauthorized users. Anyone using this system expressly consents to such monitoring and recording. Unauthorized use of this information system is prohibited and subject to criminal and civil penalties. Except as expressly authorized by the U.S. Department of Education, unauthorized attempts to access, obtain, upload, modify, change, and/or delete information on this system are strictly prohibited and are subject to criminal prosecution under 18 U.S.C. § 1030, and other applicable statutes, which may result in fines and imprisonment. For purposes of this system, unauthorized access includes, but is not limited to:

- any access by an employee or agent of a commercial entity, or other third party, who is not the individual user, for purposes of commercial advantage or private financial gain (regardless of whether the commercial entity or third party is providing a service to an authorized user of the system); and
- any access in furtherance of any criminal or tortious act in violation of the Constitution or laws of the United States or any State.

If system monitoring reveals information indicating possible criminal activity, such evidence may be provided to law enforcement personnel.

Decline   Accept

• Click on "Make Corrections" next to Make Corrections to My FAFSA Form.

- You will be prompted to enter a Save Key. This allows you to return and make corrections/revisions to the FAFSA.
- Navigate to the "Financial Information" tab. This takes you to the Parent or Student Financial section. If parental tax data was requested, be sure you are in the Parent Financials tab.
- Update your filing status if applicable. Change from "Will file" to "Already completed" if applicable.
- Enter the required student information: First name, last name, DOB, SSN.
- Answer the three questions to determine if you are eligible for the IRS Data Retrieval Tool (DRT).

For 2021, have you completed your IRS income tax return or another tax return?

Already completed ⌄ ⓘ

What income tax return did you file for 2021?

Select ⌄ ⓘ
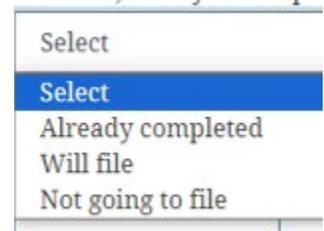
For 2021, what is your tax filing status according to your tax return?

Select ⌄ ⓘ

Select

| Select |
| Already completed |
| Will file |
| Not going to file |

Previous   Continue

- If you are eligible to use the DRT, the box at the bottom will state, "RECOMMENDED. IRS Data Retrieval Tool. Applying is faster and easier if you transfer your tax return information into this FAFSA form with the IRS Data Retrieval Tool (DRT)!"

RECOMMENDED

IRS Data Retrieval Tool

Applying is faster and easier if you transfer your tax return information into this FAFSA® form with the IRS Data Retrieval Tool (DRT)!

🔒 *For your protection, your tax return information will not display on the IRS website or on the FAFSA® form.*

Previous   Skip IRS DRT and Complete Manually

Proceed to the IRS >

- If updating parental information, select which parent is providing information on the F AFSA from the drop-down box, then enter your Save Key.

- Click "Proceed to the IRS" to leave the FAFSA website and continue to the IRS website.

STUDENT INFORMATION

Student Leaving Your FAFSA® Form

You have entered answers to one or more income questions. Your FAFSA form will delete these responses and replace them with information contained in your tax return when you transfer your IRS tax information into this FAFSA form.

You are now leaving your FAFSA form and will be transferred to the IRS website to access your IRS tax information. Your FAFSA information will be saved.

Your saved FAFSA form will automatically open either when you transfer your information from the IRS or choose to return to your FAFSA form from the IRS website. If you do not transfer your information or choose not to return to your FAFSA form from the IRS website, you will have to log in to open your saved FAFSA form.

Skip IRS DRT and Complete Manually   Proceed to the IRS

- Click "Proceed to the IRS" to leave the FAFSA website and continue to the IRS website.
- Click "OK" to leave the FAFSA website and continue to the IRS website.

- Choose "OK" to acknowledge "The U.S. Government System is for Authorized Use Only".

- Review and enter required information in the fields displayed on the Get My Federal Income Tax Information. **All information must exactly match what was used on the tax returns.** Click "Submit."

- Verify information displayed is accurate and click on the "Transfer Now" button.

- On the IRS Info screen, it should show 'You have successfully transferred your 2021 IRS Tax Information in the message box, and 'Transferred from the IRS' in the tax

information box.

• Click "Continue" at the bottom of the page

STUDENT INFORMATION
Student IRS Info

✔ **You have successfully transferred your 2021 IRS tax information.**

Your IRS tax information has been successfully transferred into this FAFSA® form. Questions that were populated with tax information will be marked with "Transferred from the IRS." For your protection, IRS tax return information is not displayed on the FAFSA form.

What was your and your spouse's adjusted gross income for 2021?

| Transferred from the IRS | ⓘ |

| Previous | | Continue |

• Click "Continue" at the bottom of the page when finished.

• You have the option print the confirmation page for your records.

• Enter the information on the Income fields

• Click "Continue" at the bottom of the page when finished.

STUDENT INFORMATION

Student Income from Work

How much did you earn from working (wages, salaries, tips, etc.) in 2021?
This amount is the total of IRS Form 1040—line 1 + Schedule 1, lines 3 + 6 + Box 14 (Code A) of Schedule K-1 (Form 1065).

| $ | | .00 | ⓘ |

How much did your spouse earn from working (wages, salaries, tips, etc.) in 2021?
This amount is your spouse's portion of IRS Form 1040—line 1 + Schedule 1, lines 3 + 6 + Box 14 (Code A) of Schedule K-1 (Form 1065).

| $ | | .00 | ⓘ |

| Previous | | Continue |

• On the Simplified Path Determination screen, it should show 'Transferred from the IRS'.

• Click "Continue" at the bottom of the page.

STUDENT INFORMATION

Student Simplified Path Determination

Did you file a Schedule 1? Select "No" if you did not file a Schedule 1 or **only filed** a Schedule 1 to report: unemployment compensation, educator expenses, IRA deduction, student loan interest deduction, or Alaska Permanent Fund dividend. Learn more about Schedule 1.

Transferred from the IRS ⓘ

Previous   Continue

- On the Additional IRS Info screen, it should show 'Transferred from the IRS'.
- Click "Continue" at the bottom of the page.

STUDENT INFORMATION

Student Additional IRS Info

Enter the amount of your (and your spouse's) income tax for 2021.

Transferred from the IRS ⓘ

Previous   Continue

Sign & Submit the FAFSA Update

- On the Sign & Submit page, enter the Save Key.
- Click on "Agree" to "Terms of Agreement"
- Click on "Submit My FAFSA Now."

- For **parent** update: On the Sign & Submit page, click on the correct parent that is signing the FAFSA update: Parent 1 or Parent 2. If only student information is being updated, a parent signature may not be required.
- Enter the Save Key.
- Click on "Agree" to "Terms of Agreement – Parent".
- Click on "Submit My FAFSA Now."

Updated FAFSAs are usually received by Cal Poly within 3-5 business days. If the IRS Data Retrieval was successful, the Tax Transcript checklist item will be removed from the To-Do list within 4 business days. If the IRS Data Retrieval item has not been removed from your To-Do list 5 business days after submitting the change to your FAFSA, you may try to update again and/or contact the FAFSA help line to verify that the update was successfully transmitted: 800-433-3243.

Option 2: Request a Tax Return Transcript from the IRS

If you are not eligible to use the IRS Data Retrieval on the FAFSA, a Tax Return Transcript should 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.

- Go to www.irs.gov
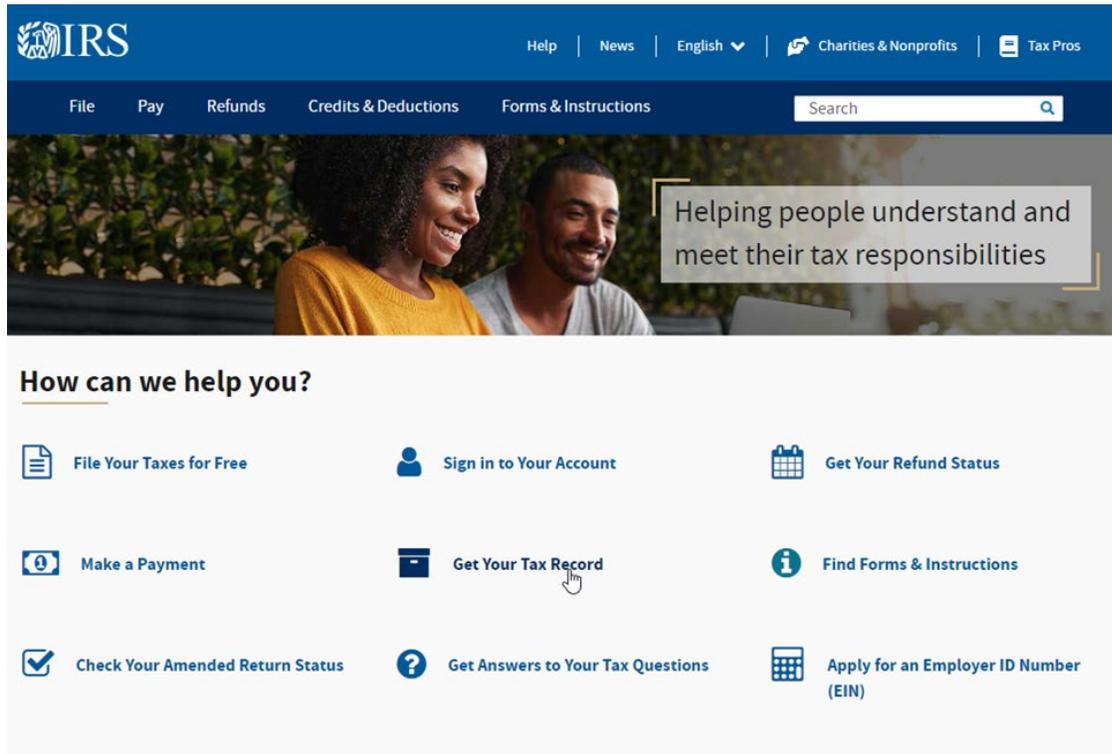
- Click on "Get Your Tax Record".
- Determine which option you want to use: Request Online or Request by Mail.

Get Your Tax Record

English | Español | 中文 (简体) | 中文 (繁體) | 한국어 | Русский | Tiếng Việt | Kreyòl ayisyen

Individuals

Who Should File

How to File

When to File

Where to File

Your Information

    Tax Record (Transcript)

    Third Party Authorization

Life Events

Students

Employees

Parents

Military

Seniors & Retirees

Businesses and Self-Employed

Charities and Nonprofits

International Taxpayers

Governmental Liaisons

Federal State Local Governments

Order copies of tax records including transcripts of past tax returns, tax account information, wage and income statements, and verification of non-filing letters.

Access Tax Records in Online Account

You can view your tax records now in your Online Account. This is the fastest, easiest way to:

- Find out how much you owe
- Look at your payment history
- See your prior year adjusted gross income (AGI)
- View other tax records

Visit or create your Online Account.

The method you used to file your tax return (e-file or paper) and whether you had a balance due affects your current year transcript availability.

Request Online

Request your transcript online for the fastest result.

What You Need

If you don't have an existing IRS username or ID.me account, have your photo identification ready.

What You Get

- All transcript types are available online
- View, print, or download your transcript
- Verify your identity once and you can easily return later to get a transcript or use other IRS online services

Get Transcript Online

Caution: This service is for individual taxpayers to retrieve their own transcripts for their own purposes. Use by any other entities is prohibited.

Alternative to Requesting a Transcript Online

We recommend requesting a transcript online since that's the fastest method. If you can't get your transcript online, you can request a tax return or tax account transcript by mail instead.

What You Need

To request a transcript by mail, you need your mailing address from your latest return.

What You Get

- Tax return or tax account transcript types delivered by mail
- Transcripts arrive in **5 to 10 calendar days** at the address we have on file for you

Get Transcript by Mail

You can also request a transcript by mail by calling our automated phone transcript service at 800-908-9946.

Visit our Get Transcript frequently asked questions (FAQs) for more information. If you're trying to get a transcript to complete FAFSA, refer to tax Information for student financial aid applications.

Note: Transcripts partially mask your personally identifiable information for protection. Financial data will remain fully visible to allow for tax preparation, tax representation or income verification. Learn more at About Tax Transcripts. If you need a photocopy of your return, submit Form 4506.

For "Request Online"

- Click "Get Transcript Online"
- On Sign In or Create a New Account screen, if you already have an existing IRS account, you can sign in to your existing IRS account with **ID.me** *or* **with an existing IRS username**: click on the method you wish to sign in with.
- Follow the steps to sign in to your existing IRS account.

- If you do not already have an IRS account, click on "Create an account".
- Follow all of the steps to create an IRS account.

- Once you have logged-in and 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 number).
- In the Return Transcript choices, click on the 2021 tax year: 2023-2024 FAFSA uses 2021 tax year data.
- 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". This appears differently on different browsers.
- Print the transcript that pops up on your screen. It will say **Tax Return Transcript** in the header.

For "Request by Mail":

- Click "OK" to agree to "This U.S. Government System is for Authorized use Only!"
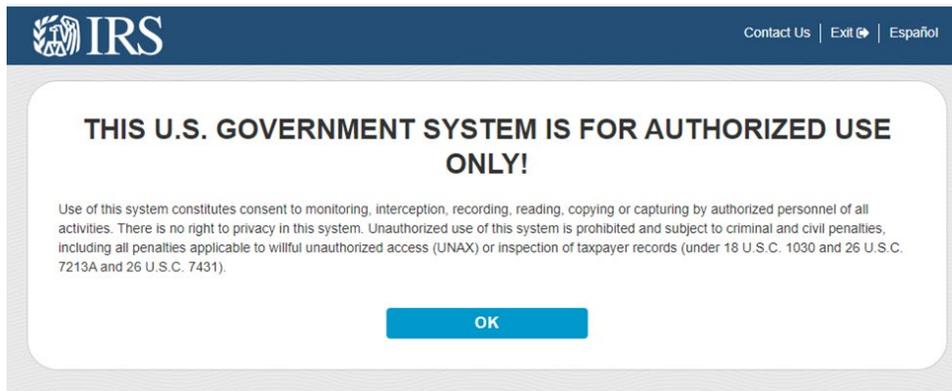
- Complete the required information. **Information must match the information on the tax return.**
- Click "Continue".

- In Select Transcript Type, click on Return Transcript
- In Select Tax Year, click 2021. **2023-2024 FAFSA uses 2021 tax year data.**
- Click "Continue".

- After you have clicked "CONTINUE", you should receive a confirmation that your request has been accepted. The Tax Return Transcript will be mailed to the address used on your tax return and should be received in 5-10 business days. You can print this page for your records.
- Click "Exit" to log out of the IRS website.

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. For the fastest processing, upload the Tax Return Transcript as an attachment within the 2021 Tax Information Adobe Sign form linked on the student's To-Do List. You may also email the document to financialaid@calpoly.edu or fax it to the office at 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 transcripts are printed double-sided and we need the complete transcript

for review. When sending sensitive information electronically, we highly encourage the use of file encryption. <u>We cannot process incomplete submissions.</u>