2012-2013 NON-TAX FILER / INCOME STATEMENT – PARENT(s)

RETURN TO: CAL POLY FINANCIAL AID OFFICE SAN LUIS OBISPO, CA 93407-0201 **FAX: (805) 756-7243**	Student Last Name:
	Student First Name:
	Phone # **EMPL ID#:**

Deadline: All forms should be submitted as soon as possible. Documents must be submitted no later than November 1, 2012 to keep campus based aid. In all circumstances documents must be submitted prior to the last day of a student's enrollment for any aid.

The Department of Education has selected your student's FAFSA for review in a process called Verification. You indicated you **are not required to file taxes**. In this process we will be confirming information from your student's FAFSA with information we are collecting on this form. Please review the IRS tax filing requirements listed on page 2 and check and sign in the appropriate space below.

2011 IRS Tax Filers:

☐ This form does NOT apply because I/we are required to file 2011 taxes (based on IRS Tax Filing Requirements listed on page 2). I/we will follow the instructions to have our tax data submitted to Cal Poly Financial Aid Office.

I certify that all the information reported to on this form is true. False statements or misrepresentation will be cause for denial, reduction, withdrawal, and/or repayment of financial aid.

_____
Parent Signature   (required if checked box above)   Date

NON-TAX FILERS: PLEASE COMPLETE THIS INFORMATION ABOUT YOUR PARENT(S) 2011 INCOME

Do not leave any income items blank. Enter zero ($0) under "Amount Earned" if you did not work and/or had no income. See IRS Grid on following page for income filing requirements. Signatures required below.

Check all that apply:

☐ Father   ☐ Mother   Did not work in 2011.

☐ Father   ☐ Mother   Worked in 2011.

List below each employer and any other sources and amounts of earned income during 2011.   **Submit copies of all W-2's**
.
FATHER (STEPFATHER):

Name of Employer / Income Source:	**Amount Earned:**	✔ **if W-2's Attached**
	$	☐
	$	☐
	$	☐

MOTHER (STEPMOTHER):

Name of Employer / Income Source:	**Amount Earned:**	✔ **if W-2's Attached**
	$	☐
	$	☐
	$	☐

Sign This Form:
By signing this form, I/we certify that all the information reported above is correct. **I certify that I/we are not required to file a 2011 Federal Income Tax Return. I/we have not/will not file a 2011 Federal Income Tax Return** (based on IRS Tax Filing Requirements listed on page 2). False statements or misrepresentation will be cause for denial, reduction, withdrawal, and/or repayment of financial aid.

_____
Parent Signature   (required - here or above)   Date

2011 IRS Tax Filing Requirements. If your 2011 income exceeded the amount noted below that apply to your filing status then you are required to file a 2011 federal tax return.

IF your filing status is:	AND at the end of 2011 you were:	THEN file a return if your gross income was at least:
Single	Under 65	$9,500
	65 and older	$10,950
Head of Household	Under 65	$12,200
	65 and older	$13,650
Married, filing jointly	Under 65 (both spouses)	$19,000
	65 or older (one spouses)	$21,150
	65 or older (both spouses)	$21,300
Married, filing separately	Any age	$3,700
Qualifying widow(er) with dependent	Under 65	$15,300
	65 or older	$16,450

If your income is zero or less than is required for your filing status, please complete the Non-Filer Income statement above, sign and return to the Cal Poly Financial Aid Office

If your parent(s) are required to file a 2011 federal tax return:
Federal verification requires that we confirm your income via one of the two processes noted below.

IRS DATA RETRIEVAL PROCESS or TAX TRANSCRIPT - You are required to submit your Parent's 2011 IRS tax information using either the FAFSA IRS Data Retrieval Process or by requesting a 2011 tax transcript from the IRS.

1.   IRS DATA RETRIEVAL PROCESS:
To use the IRS Data Retrieval Process (the recommended method if you are allowed to do so):
If you file electronically, approximately 3 weeks after filing by log on to the FAFSA Web site at www.fafsa.gov and select Make FAFSA Corrections link.
Change your tax information from "will file" to "have filed". A series of questions will appear and if you are able, the IRS Data Retrieval Option will be made available.
Follow the instructions to have the IRS data uploaded to your FAFSA record.
Complete the FAFSA update. **Make sure Cal Poly is still listed as a school to receive the FAFSA record.**
Cal Poly will then receive record of the updated FAFSA with the IRS confirmed income data.

2. TAX TRANSCRIPT:
If you cannot use the IRS Data Retrieval on the FAFSA, tax transcripts can be requested on the IRS Web site at www.irs.gov or by calling the IRS at 1-800-908-9946. Make sure you keep your original and provide a COPY to our office. We will not be able to make copies for you.

Per NEW federal regulations, the only acceptable documentation is the IRS Data Retrieval Process or federal tax transcript. No State Tax Returns are required or accepted.

Include student's Cal Poly EMPL ID on all documents.
.