



CAL POLY

Request for Student's or Borrower's Taxpayer
Identification Number and Certification
(Substitute Form W-9S)

Complete and sign form, then return in person or by mail, to:

Cal Poly
Student Accounts
1 Grand Avenue
Admin Bldg 1, Room 211
San Luis Obispo, CA 93407-0881

**Do Not Submit this
form to the IRS.**

Required Information	
Name of Student	Student Poly EMPL ID
Address	

PART I <i>Choose One Option and Sign Required</i>	<p>Taxpayer Identification Number (SSN or ITIN) _ _ _ - _ _ - _ _ _</p>
	<input type="checkbox"/> I certify that the number shown above is my correct taxpayer identification number.
	OR
	<input type="checkbox"/> I am a foreign national/nonresident alien and do not have a Social Security number or individual taxpayer identification number. I do not plan to file an income tax return in the United States.
	OR
<input type="checkbox"/> I do not wish to provide my taxpayer identification number to Cal Poly at this time. I understand that I may be subject to an IRS fine of \$50 for failure to do so. I further understand that the IRS will not be able to use the Form 1098-T filed by Cal Poly to confirm my eligibility for certain education tax benefits without my taxpayer identification number.	
AND	
	<p>_____ Signature _____ Date</p>

PART II	<p><i>FOR STUDENT LOAN BORROWERS ONLY</i> I certify that all of the loan proceeds are solely to pay for qualified higher education expenses.</p> <p>_____ Signature _____ Date</p>
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Instructions

Cal Poly is required to request your correct identifying number to file Form 1098-T, Tuition Statement, with the IRS and to furnish a statement to you. This will be your Social Security number (SSN) or, if you are not eligible to obtain an SSN, your individual taxpayer identification number (ITIN). Form 1098-T contains information about qualified tuition and related expenses to help determine whether you, or the person who can claim you as a dependent, may take either the tuition and fees deduction or claim an education credit to reduce federal income tax. For more information, see IRS Pub. 970, Tax Benefits for Higher Education.

Under federal law, you are required to provide the requested information.

Required Information

Enter your name, mailing address and Cal Poly EMPL ID. The name should match that used by the Social Security Administration or Internal Revenue Service.

Part I – Choose One Option and Sign (Required)

You may enter your Taxpayer identification number – either a Social Security Number (SSN) or Individual Taxpayer Identification Number (ITIN) should you not have an SSN. If you do not have either an SSN or ITIN, apply for one and fill out and return this form when you receive it.

Check one of the three boxes and sign your name in the space provided. Student Accounts cannot change your 1098-T filing records without your signature. By law, Cal Poly must ask you at least once a year for your taxpayer identification number in order to meet its obligation to file Form 1098-T.

Part II – (for student loan borrowers only – not required)

If you have a student loan solely to pay for qualified higher education expenses, sign Part II. If you fail to, the lender may not issue or file Form 1098-E for student loan interest. Do not sign Part II if your loan is for both qualified and non-qualified higher education expenses. You may sign Part II for a revolving line of credit or similar loan if you use the line of credit solely to pay for qualified higher education expenses.

Deliver or mail the completed form to the address provided. Do not email the form. Email is not a secure way to transmit personal information.

Penalties

If you fail to furnish your correct SSN or ITIN to Cal Poly, the IRS may impose a penalty of \$50 unless your failure is due to reasonable cause and not to willful neglect.

If Cal Poly discloses or uses your SSN in violation of federal law, Cal Poly may be subject to civil and criminal penalties.

Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to give your correct SSN or ITIN to persons who must file information returns with the IRS to report certain information. The IRS uses the numbers for identification purposes and to help verify the accuracy of your tax return. The IRS may also provide this information to the Department of Justice for civil and criminal litigation and to cities and states to carry out their tax laws.