



FACTS Grant & Aid Application Tax Return Requirements

Families completing a Grant & Aid Application must upload tax documentation, including a Federal Tax Return, applicable schedules, and necessary forms. FACTS Management reviews the forms and alerts you if additional documents are needed.

Forms & Schedules

The examples below may not be applicable to all applicants. No need to be a tax expert, upload all documents included in your Federal Tax Return file and the system identifies required items.

- **Form 1040**
- **Schedule C**
- **Schedule E**
- **Form 1065**
- **Dependent Statement**
- **Schedule F**
- **Form 1041**
- **Form 1120S**
- **Schedules 1 & 3**
- **Form 4562**
- **Schedule K-1**
- **Form 8825**

Application Summary

The Application Summary displays the application status and required documents. The school or organization determines the exact tax year to upload. Upon submission of the application, a notice is sent via email advising of the tax year required. Use the Help icon to view the list of forms and access links to the IRS website. Return to FACTS at any time to view the application status and tax document requirements in the Application Summary.

Application Summary

Application Status: **INCOMPLETE** Application ID: 1705178
2020-20

The following step(s) are needed to complete your application:

- ➔ Upload your required documents

Required Documents

Help

Tax Documents	
20 Federal Tax Return - Carmen	<input type="radio"/> Form 1040 (Page 1) <input type="radio"/> Form 1040 (Page 2)
20 Federal Tax Return - James	<input type="radio"/> Form 1040 (Page 1) <input type="radio"/> Form 1040 (Page 2)
20 W-2s - Carmen	<input type="radio"/> W-2

Supplemental Documents

Divorce Decree ?	<input type="radio"/>
Sample Institution	Document

Not Submitted In Process Complete Waived

Upload

