



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

The completion of the Grant & Aid Application is dependent on the submission of the required tax documents. Upload all documents in your tax return file. Ensure the following documents are included in the file.

1040 U.S. Individual Income Tax Return

Pages 1 and 2 of the [1040 Federal Tax Return](#) determine which additional documents are required.

1040 Department of the Treasury—Internal Revenue Service **2023** U.S. Individual Income Tax Return OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

For the year Jan. 1–Dec. 31, 2023, or other tax year beginning _____, 2023, ending _____, 20 _____ See separate instructions.

Your first name and middle initial _____ Last name _____ Your social security number _____

If joint return, spouse's first name and middle initial _____ Last name _____ Spouse's social security number _____

Home address (number and street). If you have a P.O. box, see instructions. _____ Apt. no. _____ Presidential Election Campaign

City, town, or post office. If you have a foreign address, also complete spaces below. _____ State _____ ZIP code _____ Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund.

Foreign country name _____ Foreign province/state/county _____ Foreign postal code _____ You Spouse

Filing Status Single Married filing jointly (even if only one had income) Head of household (HOH) Married filing separately (MFS) Qualifying surviving spouse (QSS)

Check only one box. If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QSS box, enter the child's name if the qualifying person is a child but not your dependent: _____

Digital Assets At any time during 2023, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (See instructions.) Yes No

Standard Deduction Someone can claim: You as a dependent Your spouse as a dependent Spouse itemizes on a separate return or you were a dual-status alien

Age/Blindness You: Were born before January 2, 1959 Are blind Spouse: Was born before January 2, 1959 Is blind

Dependents (see instructions):

(1) First name	Last name	(2) Social security number	(3) Relationship to you	(4) Check the box if qualifies for (see instructions):	Child tax credit	Credit for other dependents
				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Income

Attach Form(s) W-2 here. Also attach Forms W-2G and 1099-R if tax was withheld. If you did not get a Form W-2, see instructions.

1a	Total amount from Form(s) W-2, box 1 (see instructions)		1a	
b	Household employee wages not reported on Form(s) W-2		1b	
c	Tip income not reported on line 1a (see instructions)		1c	
d	Medicaid waiver payments not reported on Form(s) W-2 (see instructions)		1d	
e	Taxable dependent care benefits from Form 2441, line 26		1e	
f	Employer-provided adoption benefits from Form 8839, line 29		1f	
g	Wages from Form 8919, line 6		1g	
h	Other earned income (see instructions)		1h	
i	Nontaxable combat pay election (see instructions)	1i		
z	Add lines 1a through 1h		1z	
2a	Tax-exempt interest	2a	b Taxable interest	2b
3a	Qualified dividends	3a	b Ordinary dividends	3b
4a	IRA distributions	4a	b Taxable amount	4b
5a	Pensions and annuities	5a	b Taxable amount	5b
6a	Social security benefits	6a	b Taxable amount	6b
c	If you elect to use the lump-sum election method, check here (see instructions)			
7	Capital gain or (loss). Attach Schedule D if required. If not required, check here			7
8	Additional income from Schedule 1, line 10			8
9	Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your total income			9
10	Adjustments to income from Schedule 1, line 26			10
11	Subtract line 10 from line 9. This is your adjusted gross income			11
12	Standard deduction or itemized deductions (from Schedule A)			12
13	Qualified business income deduction from Form 8995 or Form 8995-A			13
14	Add lines 12 and 13			14
15	Subtract line 14 from line 11. If zero or less, enter -0-. This is your taxable income			15

Attach Sch. B if required.

Standard Deduction for—

- Single or Married filing separately, \$13,850
- Married filing jointly or Qualifying surviving spouse, \$27,700
- Head of household, \$20,800
- If you checked any box under Standard Deduction, see instructions.

For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see separate instructions. Cat. No. 113208 Form 1040 (2023)

On page 2, review line 31. Any amount listed on line 31 indicates all pages of the [Schedule 3](#) are required.

Form 1040 (2023)		Page 2	
Tax and Credits	16 Tax (see instructions). Check if any from Form(s): 1 <input type="checkbox"/> 8814 2 <input type="checkbox"/> 4972 3 <input type="checkbox"/>		16
	17 Amount from Schedule 2, line 3		17
	18 Add lines 16 and 17		18
	19 Child tax credit or credit for other dependents from Schedule 8812		19
	20 Amount from Schedule 3, line 8		20
	21 Add lines 19 and 20		21
	22 Subtract line 21 from line 18. If zero or less, enter -0-		22
	23 Other taxes, including self-employment tax, from Schedule 2, line 21		23
	24 Add lines 22 and 23. This is your total tax		24
Payments	25 Federal income tax withheld from:		
	a Form(s) W-2	25a	
	b Form(s) 1099	25b	
	c Other forms (see instructions)	25c	
	d Add lines 25a through 25c		25d
	26 2023 estimated tax payments and amount applied from 2022 return		26
	27 Earned income credit (EIC)	27	
	28 Additional child tax credit from Schedule 8812	28	
	29 American opportunity credit from Form 8863, line 8	29	
	30 Reserved for future use	30	
	31 Amount from Schedule 3, line 15	31	
	32 Add lines 27, 28, 29, and 31. These are your total other payments and refundable credits		32
	33 Add lines 25d, 26, and 32. These are your total payments		33
Refund	34 If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you overpaid		34
	35a Amount of line 34 you want refunded to you . If Form 8888 is attached, check here <input type="checkbox"/>		35a
Direct deposit? See instructions.	b Routing number	c Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings	
	d Account number		
	36 Amount of line 34 you want applied to your 2024 estimated tax	36	
Amount You Owe	37 Subtract line 33 from line 24. This is the amount you owe . For details on how to pay, go to www.irs.gov/Payments or see instructions		37
	38 Estimated tax penalty (see instructions)	38	
Third Party Designee	Do you want to allow another person to discuss this return with the IRS? See instructions <input type="checkbox"/> Yes. Complete below. <input type="checkbox"/> No		
	Designee's name	Phone no.	Personal identification number (PIN)
Sign Here	Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.		
	Your signature	Date	Your occupation
Joint return? See instructions. Keep a copy for your records.	Spouse's signature. If a joint return, both must sign.	Date	Spouse's occupation
	Phone no.	Email address	
Paid Preparer Use Only	Preparer's name	Preparer's signature	Date
	Firm's name	PTIN	Check it: <input type="checkbox"/> Self-employed
	Firm's address	Phone no.	Firm's EIN

Go to www.irs.gov/Form1040 for instructions and the latest information.

Form **1040** (2023)

Schedule 1

The [Schedule 1](#) is a 2-page document, review Lines 3, 5, and 6.

- **Line 3** indicates an income or loss from a sole proprietorship business.
 - Any amount listed on line 3 requires a [Schedule C](#).
 - Multiple Schedule C's may be required. The total income from the schedules must equal the amount listed on Line 3 of the Schedule 1.
- **Line 5** indicates an income or loss from any of the following: rental real estate, an S-Corporation, and/or a partnership.
 - Any amount listed on line 5 requires a [Schedule E](#). FACTS reviews the Schedule E and may request additional documentation to complete the business review.
- **Line 6** indicates an income or loss from a farm.
 - Any amount listed on line 6 requires a [Schedule F](#).

SCHEDULE 1 (Form 1040)		Additional Income and Adjustments to Income		OMB No. 1545-0074
Department of the Treasury Internal Revenue Service		Attach to Form 1040, 1040-SR, or 1040-NR. Go to www.irs.gov/Form1040 for instructions and the latest information.		2023 Attachment Sequence No. 01
Name(s) shown on Form 1040, 1040-SR, or 1040-NR			Your social security number	
Part I Additional Income				
1	Taxable refunds, credits, or offsets of state and local income taxes			1
2a	Alimony received			2a
b	Date of original divorce or separation agreement (see instructions):			
3	Business income or (loss). Attach Schedule C			3
4	Other gains or (losses). Attach Form 4797			4
5	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E			5
6	Farm income or (loss). Attach Schedule F			6
7	Unemployment compensation			7
8	Other income:			
a	Net operating loss	8a	()	
b	Gambling	8b		
c	Cancellation of debt	8c		
d	Foreign earned income exclusion from Form 2555	8d	()	
e	Income from Form 8853	8e		
f	Income from Form 8889	8f		
g	Alaska Permanent Fund dividends	8g		
h	Jury duty pay	8h		
i	Prizes and awards	8i		
j	Activity not engaged in for profit income	8j		
k	Stock options	8k		
l	Income from the rental of personal property if you engaged in the rental for profit but were not in the business of renting such property	8l		
m	Olympic and Paralympic medals and USOC prize money (see instructions)	8m		
n	Section 951(a) inclusion (see instructions)	8n		
o	Section 951A(a) inclusion (see instructions)	8o		
p	Section 461(l) excess business loss adjustment	8p		
q	Taxable distributions from an ABL account (see instructions)	8q		
r	Scholarship and fellowship grants not reported on Form W-2	8r		
s	Nontaxable amount of Medicaid waiver payments included on Form 1040, line 1a or 1d	8s	()	
t	Pension or annuity from a nonqualified deferred compensation plan or a nongovernmental section 457 plan	8t		
u	Wages earned while incarcerated	8u		
z	Other income. List type and amount:	8z		
9	Total other income. Add lines 8a through 8z			9
10	Combine lines 1 through 7 and 9. This is your additional income. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 8			10

For Paperwork Reduction Act Notice, see your tax return instructions. Cat. No. 71479F Schedule 1 (Form 1040) 2023