FACTS Grant & Aid Assessment.

IRS Integration Guide

Welcome to IRS integration in **FACTS Grant & Aid.** Learn and review the steps to complete the IRS Integration request.

Overview

FACTS is committed to making the financial aid process easier for schools and families. With IRS Integration, applicants can now securely retrieve their tax transcripts directly from the IRS, eliminating the need to manually scan, upload, or mail sensitive financial documents. This not only streamlines the application process for families but also reduces administrative work for schools and enhances data security. Keep reading for a step-by-step guide on how to get started with this new feature.



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Eligibility

FACTS will automatically determine eligibility and only offer this integration to eligible applications.

Eligible If:

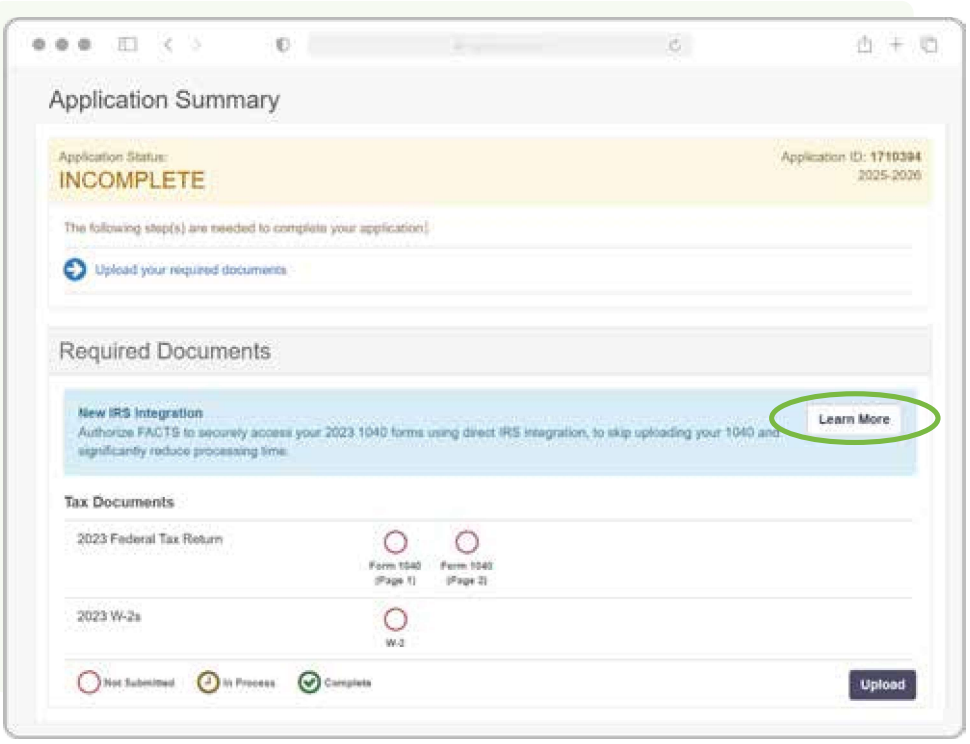
- Applying to the term 2025-2026 or later.
- The prior year tax return is required, for example, the 2023 tax return for the 2025-2026 application year.

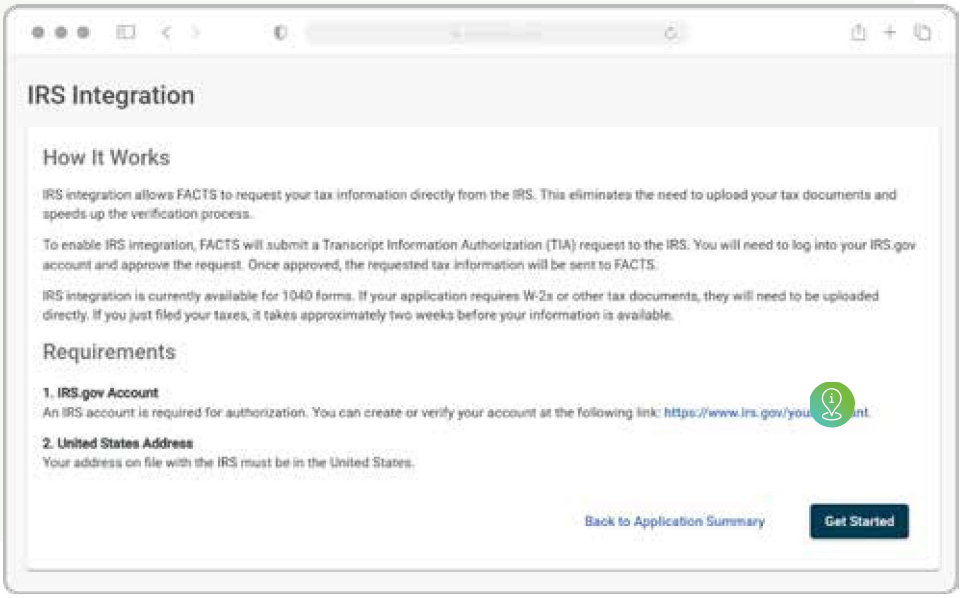
Not Eligible If:

- Applicant and Co Applicant file Separately.
- The tax return has already been uploaded, even if it is still in process being reviewed by FACTS or documents are missing.

Step 1: How it Works

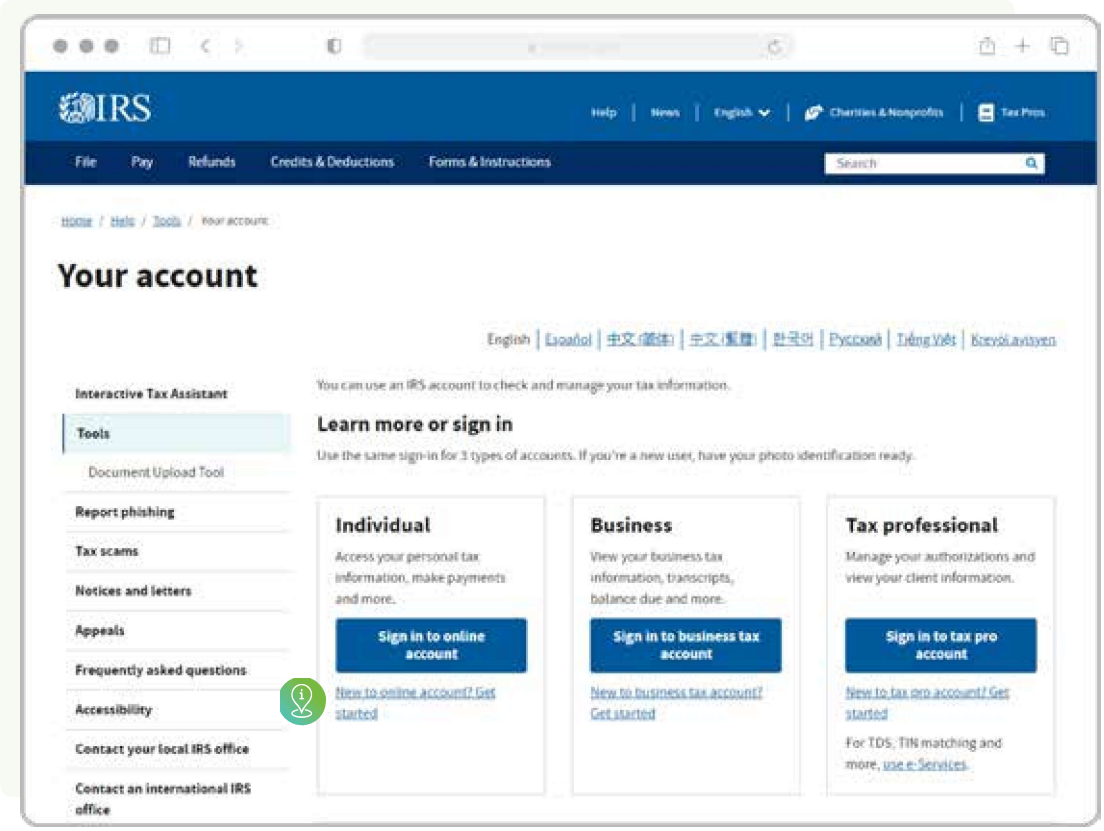
The new IRS Integration banner is displayed in the Application Summary.





To get started, you will need to create or verify your IRS.gov account by clicking the link provided.

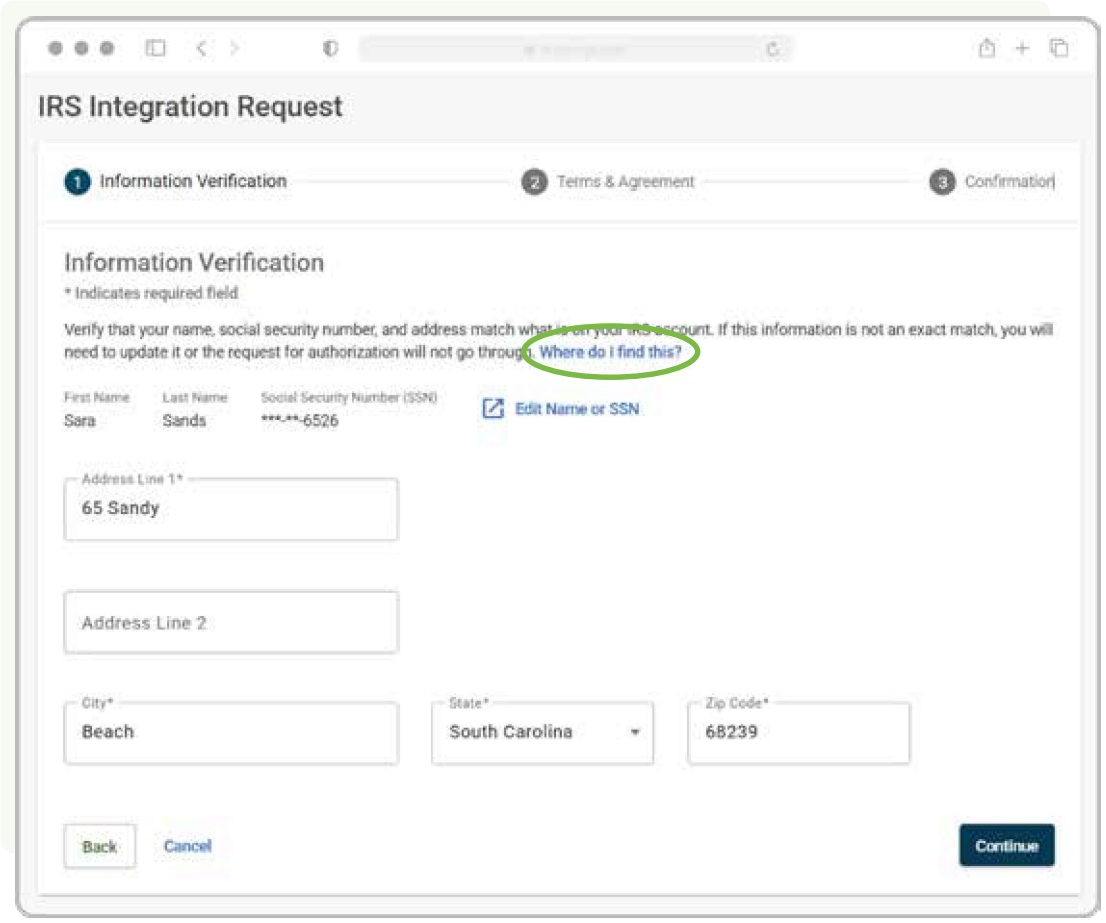
Step 1: Continued



Create or verify your IRS.gov account.

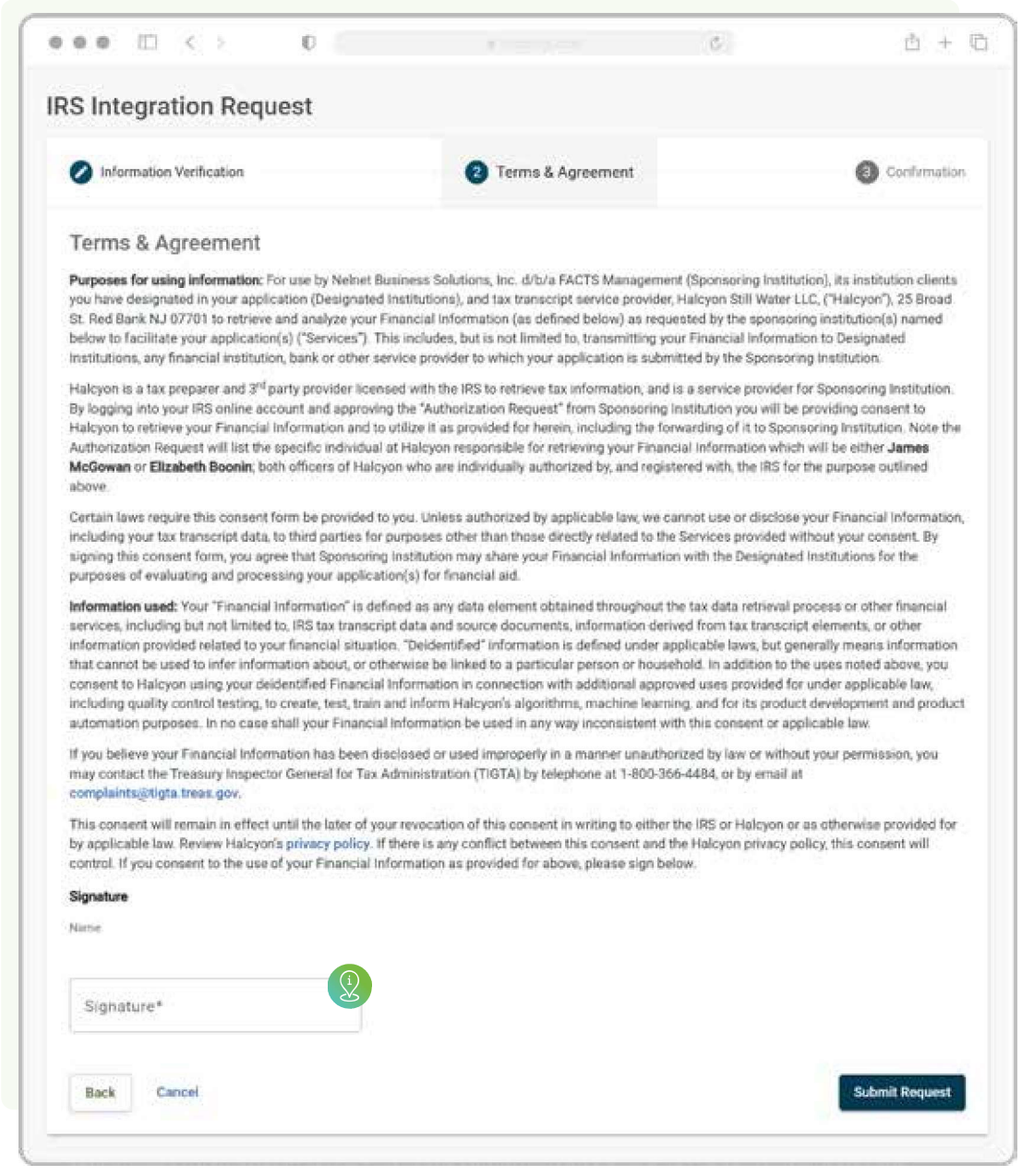
Step 2: Information Verification

Applicants need to verify their SSN, name, and address to ensure everything matches their IRS account. If needed, click the **Where do I find this?** link to check your account details.



Step 3: Terms & Agreement

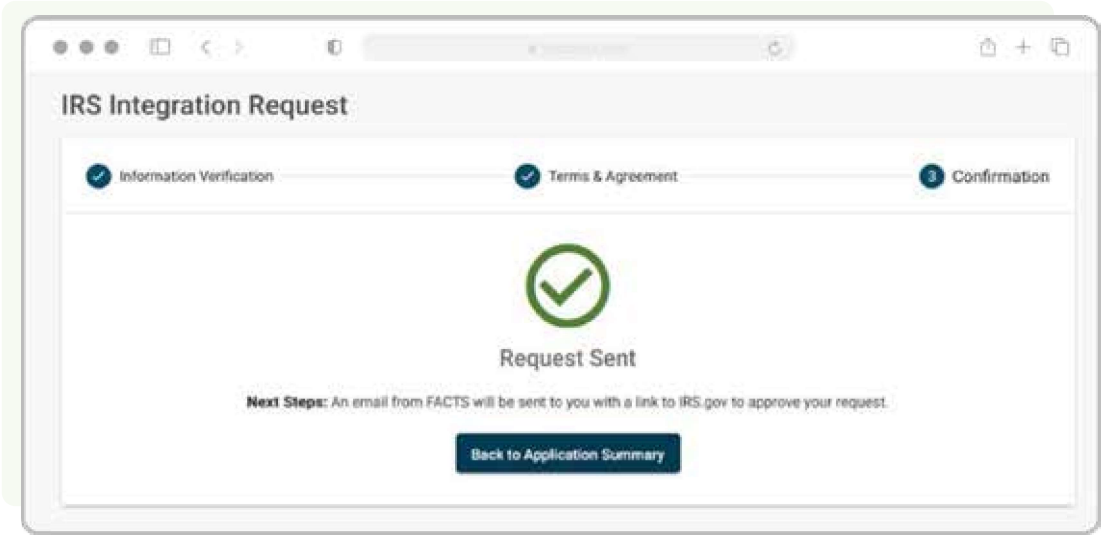
Applicant must type their name, and it must match the name on their application to submit their request. If their name doesn't match, they will be provided with information that the signature must match the name before they will be able to click submit request.



Carefully review the Terms & Agreement disclosure and provide an electronic signature.

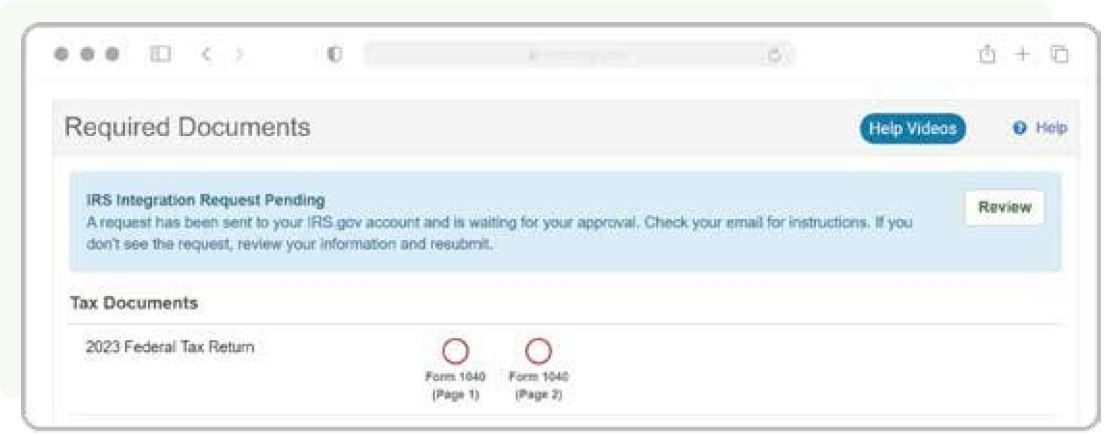
Step 4: Confirmation

Once the request is submitted the system will create an order for the IRS.

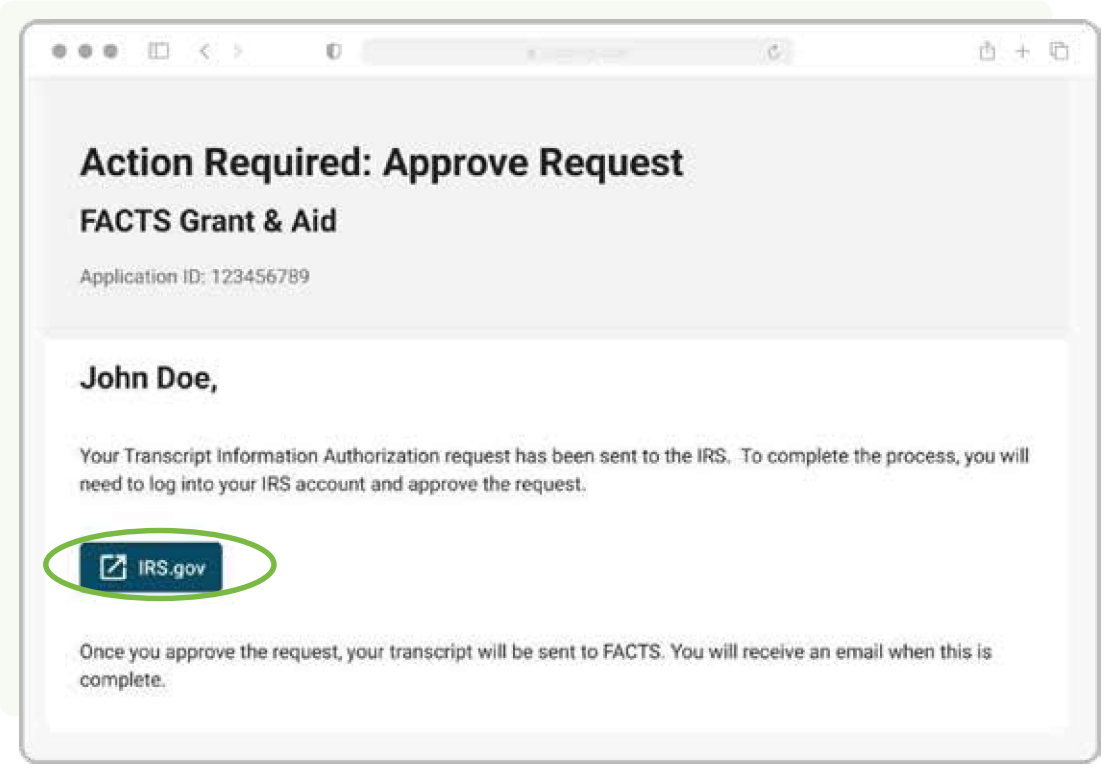


Step 5: Email Notification

On the Application Summary page, a notification will display stating the IRS integration request is pending

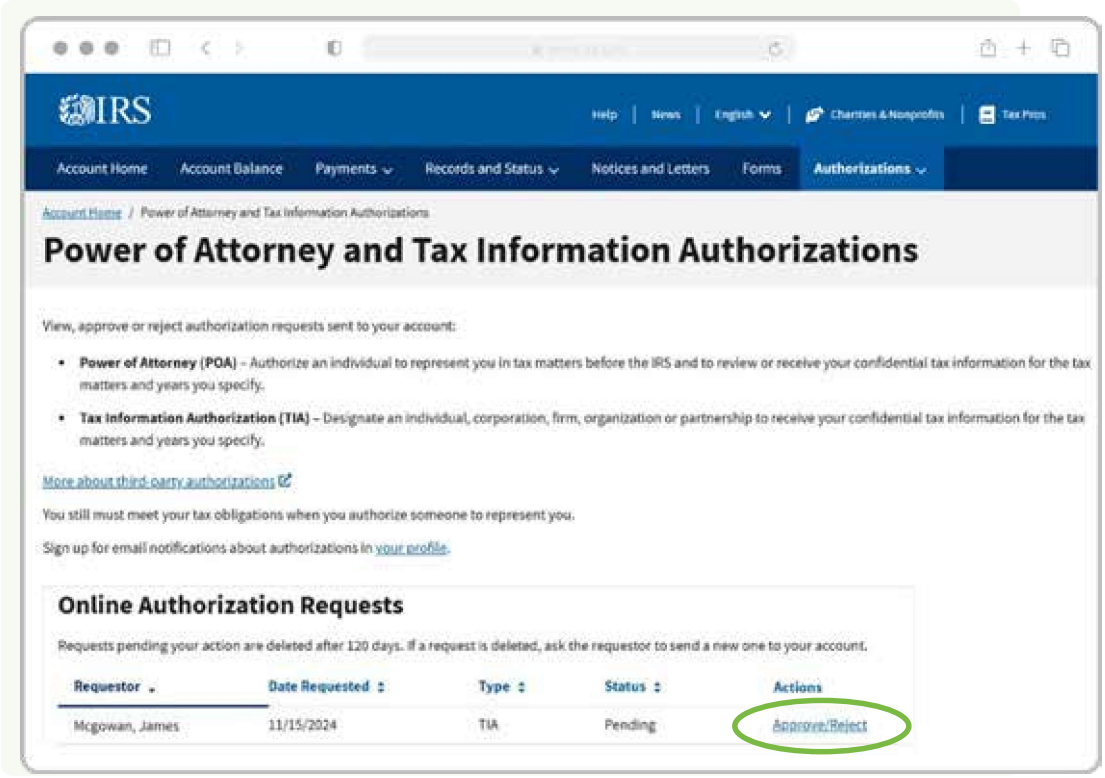


The applicant will receive an email from **FACTS Grant & Aid** with a subject line of Action Required: Approve Request. **Click the button** to go to the IRS.gov account to approve the request.



Step 6: Approve Authorization

To approve the authorization on IRS.gov, applicants must go to **Authorization**. In the drop down, select **Power of Attorney and Tax Information Authorizations**. Click the **Approve/Reject** link to provide a response to the request.



Step 6: Continued

Click **Approve Request**. And that's it! The applicant has now connected their IRS account to **FACTS Grant & Aid** and streamlined the process of submitting required tax information.

