



## About FACTS

For more than 35 years, FACTS® has provided modern education technology and financial management solutions that help educators focus on what matters most—supporting the success of their students, families, and school communities. FACTS is trusted by 12,000 schools and serves 2.2 million students through effective technology.



## Features

- A short and customizable application provides ease for families and ensures schools get a complete picture of families' needs
- Mobile-responsive application that families can complete from any device
- FACTS follows up with families to collect any missing tax documentation
- One login for families including tuition, incidental fees, and financial aid
- Spanish translation with a single click
- Supplemental documents allow schools to collect additional documents needed
- Centralized application allows families to apply to multiple schools with only one fee per household
- Comprehensive financial review including add-backs for business owners
- Formula can be customized to meet the school's needs
- Automate awarding with eligibility criteria and suggested awards
- Customizable online award notifications
- Awards can be applied directly to FACTS payment plans
- Custom reports allow schools to easily analyze and work with their data
- Internal tracking fields allow schools to customize statuses, track processes, and add custom information to the system
- Import tools allow schools to import student IDs, awards, and data into internal tracking fields
- Schools can assign requirements to applicants outside of the main application (i.e. a short form for more information, agreeing to the terms of a scholarship, or logging volunteer hours)
- FACTS is known for superior service to families and school administrators
- Family support hotline and online video instructions help families prepare to fill out the application

## Why FACTS Grant & Aid Assessment

Designed to streamline the financial aid process, FACTS Grant & Aid Assessment gives school administrators a holistic picture of a family's finances, ensuring accurate awarding of financial aid. Plus, flexible tools create an easy-to-manage process from analysis to awarding.

- **Comprehensive Financial Review:** FACTS ensures accurate analysis by going beyond the standard 1040 form to better understand a family's financial status. At no extra cost, FACTS automatically collects and reviews business documents including K-1s, 1120s, and 1065s. We adjust the assessment for an accurate picture of a family's cash flow.
- **Highly Customizable Application:** FACTS has the most customizable application on the market. Schools can add custom application questions to any section, ensuring they get all the needed information. Plus, keep the application short and easy for families by removing standard fields you don't need and setting up conditional logic on custom questions so applicants only see what applies to them.
- **IRS Integration:** Decrease the documents families must manually submit by allowing FACTS to automatically receive tax transcripts from the IRS.
- **Customizable Formula:** Adjust the formula to reflect your cost of living and philosophy. Set expense allowances, what is used for assets, and the family's contribution towards tuition after core expenses.
- **Automatically Update Enrollment Status:** When a student's enrollment status is updated in FACTS Application & Enrollment, this change will be automatically reflected within FACTS Grant & Aid.
- **One Login for Everything:** FACTS offers a comprehensive suite of solutions that supports every aspect of school financial management. For families, this means having only one login to apply for financial aid, manage tuition, and pay incidental fees.
- **35+ Years of Experience:** FACTS is built by educators for educators. With decades of experience in education technology and school financial management, we are equipped to help schools, administrators, and families solve the unique challenges they face.
- **Trusted by Thousands:** With a retention rate of 98% and 4.3 million students and families served, FACTS Grant & Aid customers stick around for the long term. Why? They appreciate your dedication to providing effective technology and unparalleled customer service.
- **Robust Reporting:** Tailor reports to your needs with standard and custom reports that offer over 330 available fields. Plus, access year-over-year reporting fields and insights on the financial summary.

[FACTSmgt.com/products/financial-management/grant-aid-assessment](https://FACTSmgt.com/products/financial-management/grant-aid-assessment)