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:

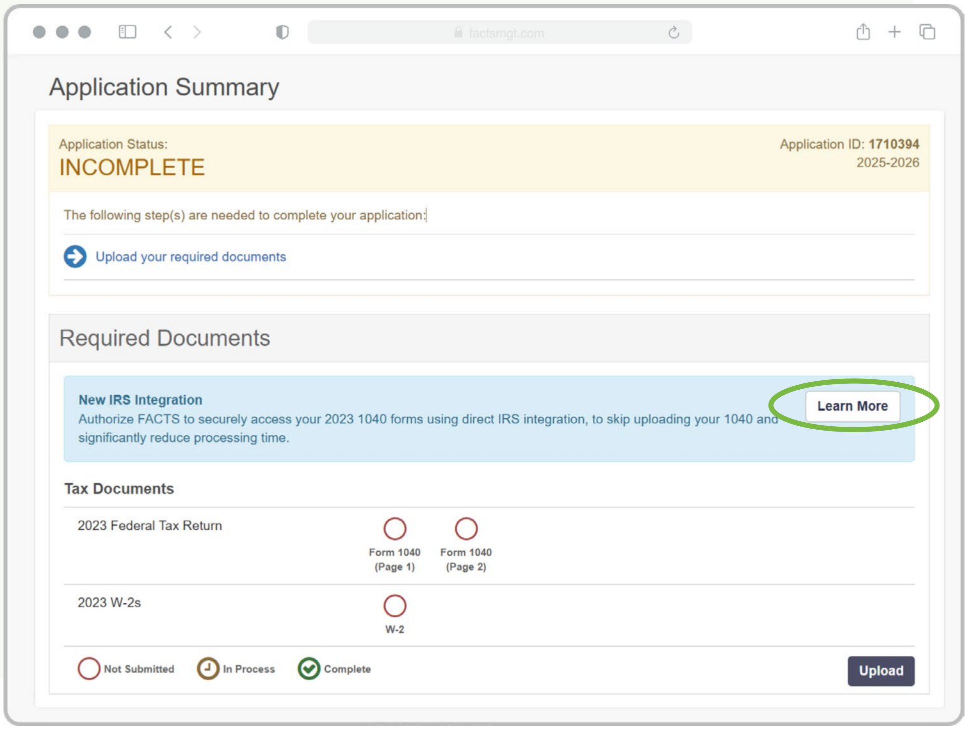
- Applying to the term 2025-2026 or later.
- The prior year tax return is required, for example, the 2023 tax return for the 2025-2026 application year.

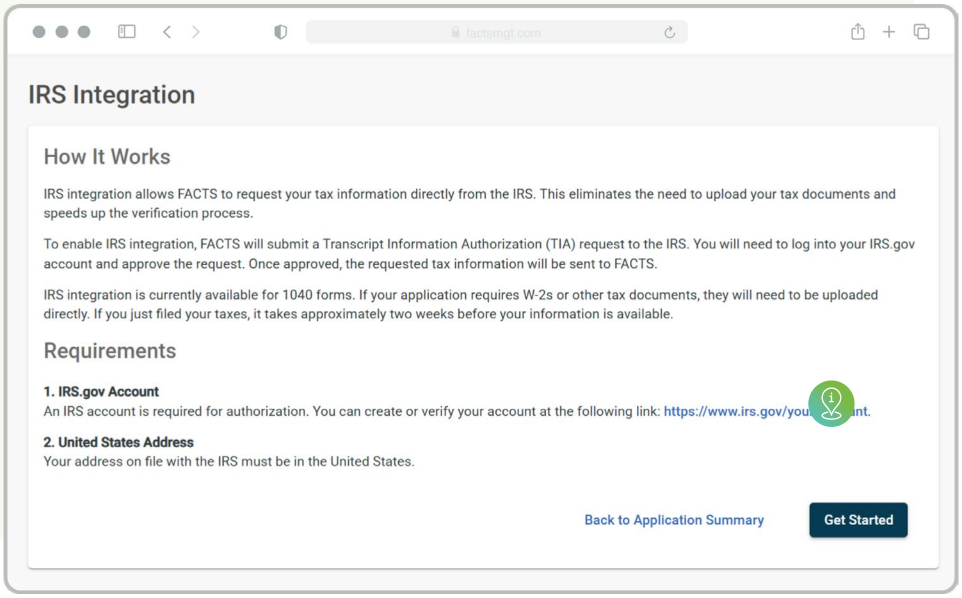
Not Eligible If:

- 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

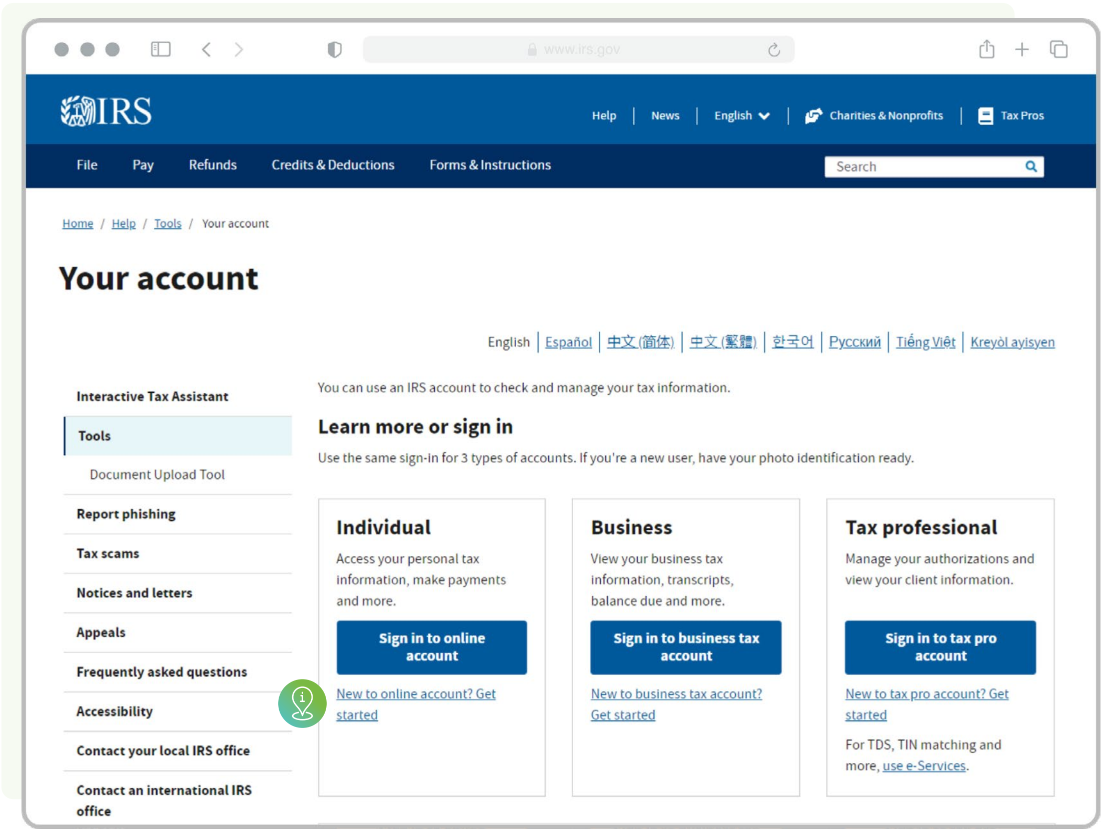
The new IRS Integration banner is displayed in the Application Summary.





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

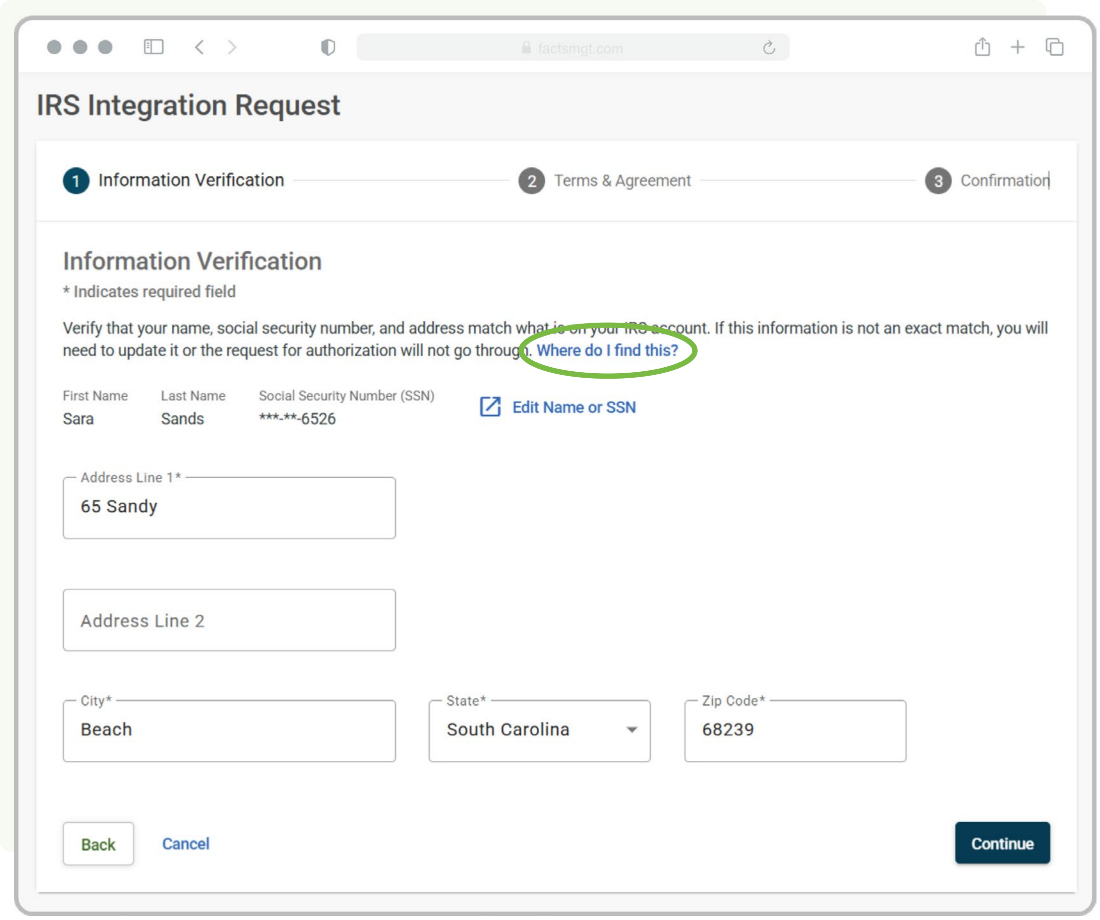
Step 1: Continued



Create or verify your IRS.gov account.

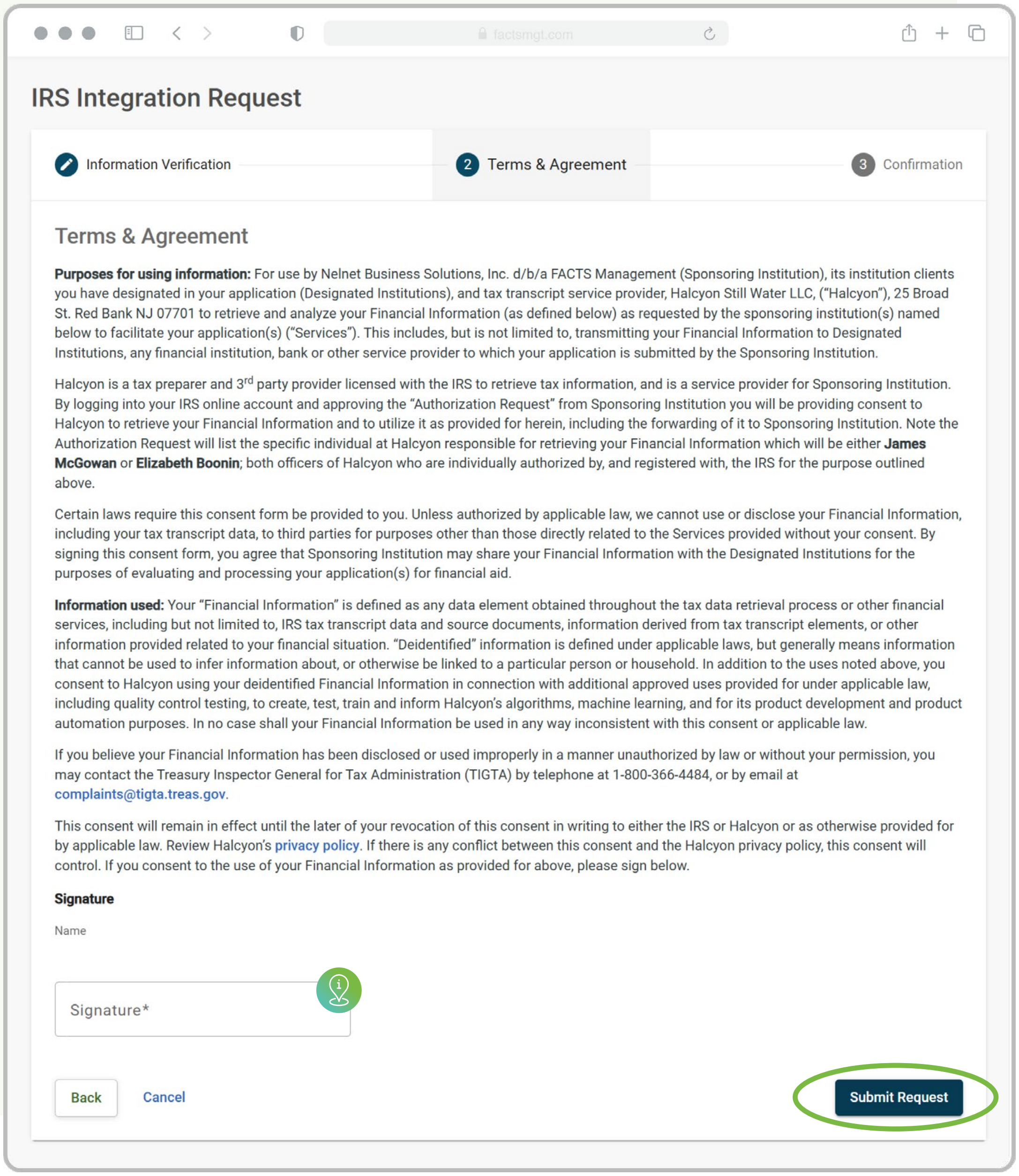
Step 2: Information Verification

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.**



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IRS Integration Request

Information Verification — 2 Terms & Agreement — 3 Confirmation

Terms & Agreement

Purposes for using information: For use by Nelnet Business Solutions, Inc. d/b/a FACTS Management (Sponsoring Institution), its institution clients you have designated in your application (Designated Institutions), and tax transcript service provider, Halcyon Still Water LLC, ("Halcyon"), 25 Broad St. Red Bank NJ 07701 to retrieve and analyze your Financial Information (as defined below) as requested by the sponsoring institution(s) named below to facilitate your application(s) ("Services"). This includes, but is not limited to, transmitting your Financial Information to Designated Institutions, any financial institution, bank or other service provider to which your application is submitted by the Sponsoring Institution.

Halcyon is a tax preparer and 3rd party provider licensed with the IRS to retrieve tax information, and is a service provider for Sponsoring Institution. By logging into your IRS online account and approving the "Authorization Request" from Sponsoring Institution you will be providing consent to Halcyon to retrieve your Financial Information and to utilize it as provided for herein, including the forwarding of it to Sponsoring Institution. Note the Authorization Request will list the specific individual at Halcyon responsible for retrieving your Financial Information which will be either **James McGowan** or **Elizabeth Boonin**; both officers of Halcyon who are individually authorized by, and registered with, the IRS for the purpose outlined above.

Certain laws require this consent form be provided to you. Unless authorized by applicable law, we cannot use or disclose your Financial Information, including your tax transcript data, to third parties for purposes other than those directly related to the Services provided without your consent. By signing this consent form, you agree that Sponsoring Institution may share your Financial Information with the Designated Institutions for the purposes of evaluating and processing your application(s) for financial aid.

Information used: Your "Financial Information" is defined as any data element obtained throughout the tax data retrieval process or other financial services, including but not limited to, IRS tax transcript data and source documents, information derived from tax transcript elements, or other information provided related to your financial situation. "Deidentified" information is defined under applicable laws, but generally means information that cannot be used to infer information about, or otherwise be linked to a particular person or household. In addition to the uses noted above, you consent to Halcyon using your deidentified Financial Information in connection with additional approved uses provided for under applicable law, including quality control testing, to create, test, train and inform Halcyon's algorithms, machine learning, and for its product development and product automation purposes. In no case shall your Financial Information be used in any way inconsistent with this consent or applicable law.

If you believe your Financial Information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at complaints@tigta.treas.gov.

This consent will remain in effect until the later of your revocation of this consent in writing to either the IRS or Halcyon or as otherwise provided for by applicable law. Review Halcyon's privacy policy. If there is any conflict between this consent and the Halcyon privacy policy, this consent will control. If you consent to the use of your Financial Information as provided for above, please sign below.

Signature

Name

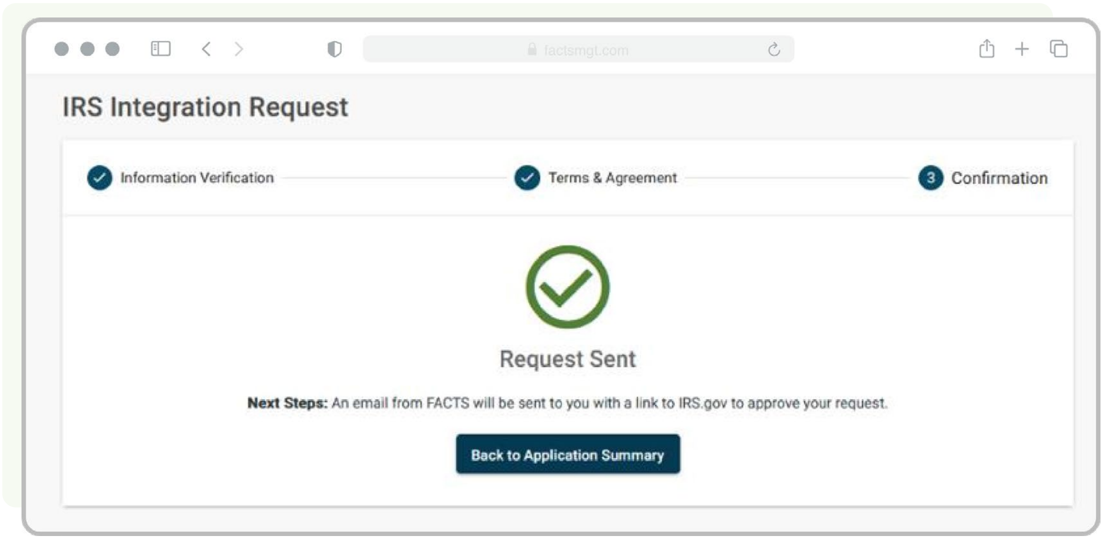
Signature*

Back Cancel Submit Request

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

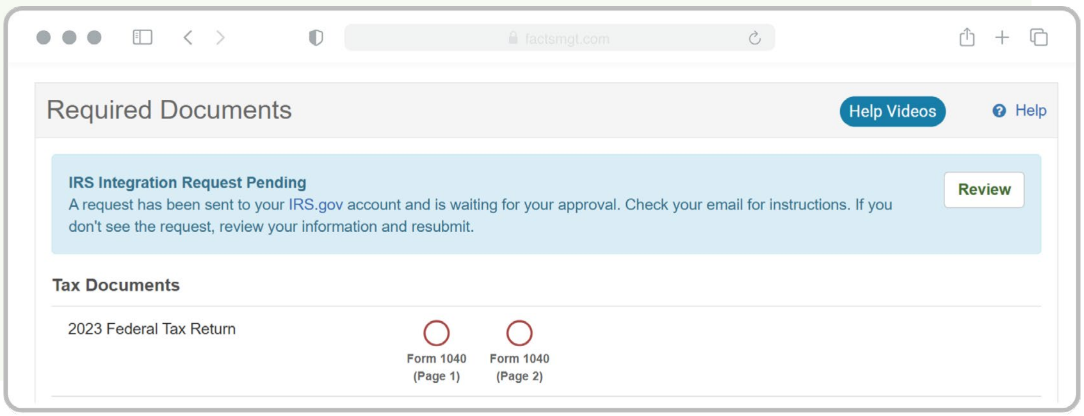
Step 4: Confirmation

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

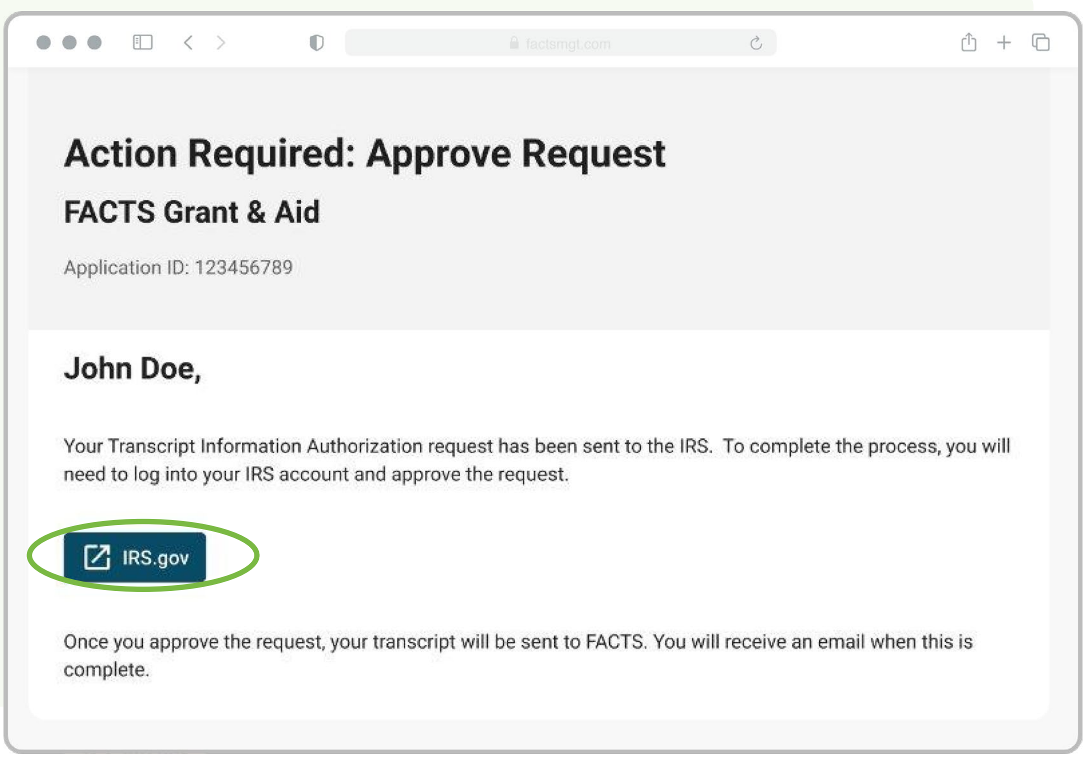


Step 5: Email Notification

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

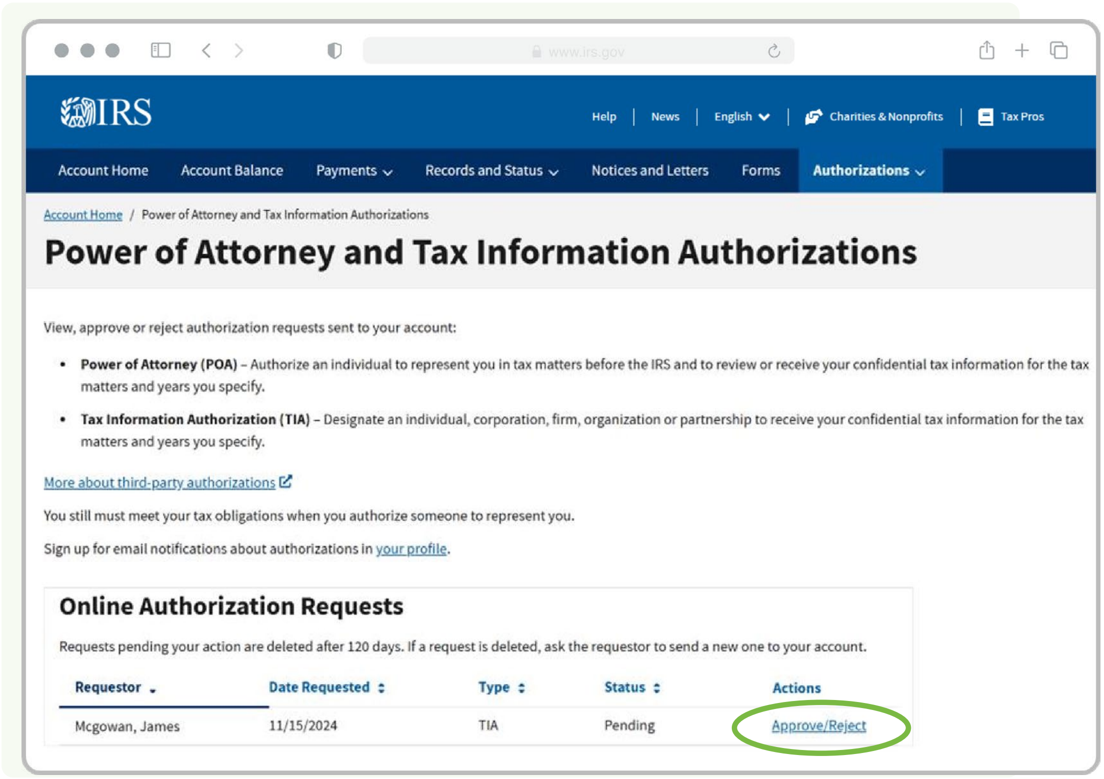


The applicant will receive an email from **FACTS Grant & Aid** with a subject line of Action Required: Approve Request. **Click the button** to go to the IRS.gov account to approve the request.



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.