FACTS Financial Aid Management

IRS Integration Guide

Welcome to IRS integration in **FACTS Financial Aid Management.** 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.

See the IRS Integration in Action
Scan the QR code for a guided overview of the process

Table of Contents

Eligibility

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

Eligible If:

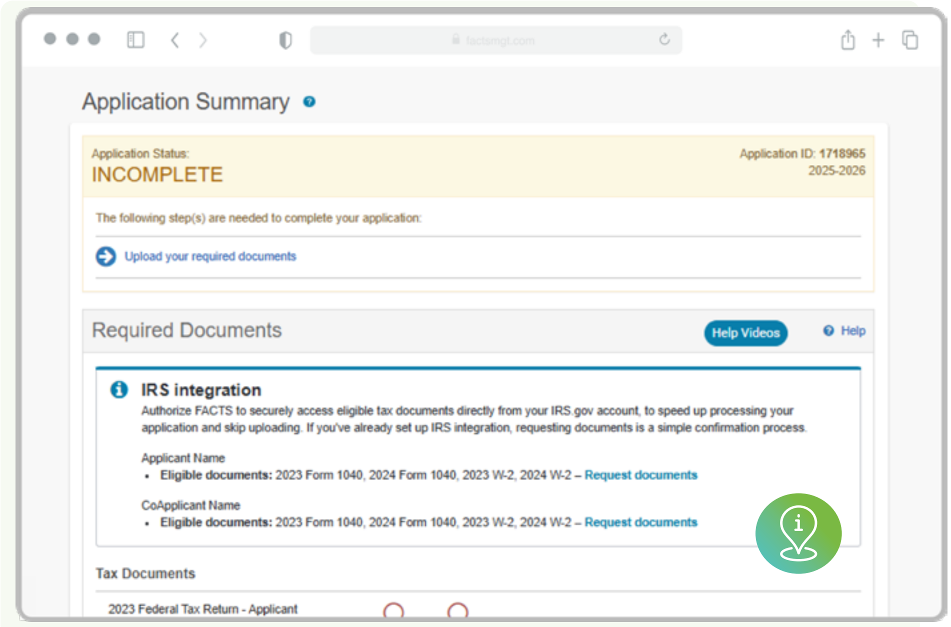
- Applying to the term 2025-2026 or later.
- A tax return or W-2 from the prior-prior year or the prior year is required. For example, for the 2025–26 application year, you can submit either your 2023 or 2024 tax return.

Not Eligible If:

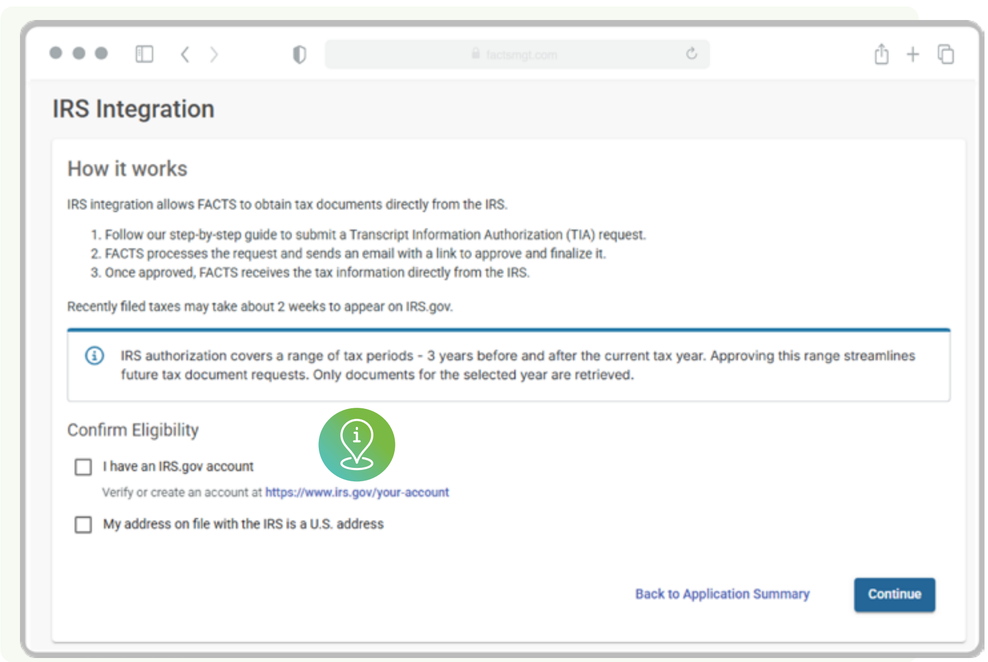
- The tax return has already been uploaded, even if it is still in process being reviewed by FACTS or documents are missing.

Step 1: How it Works

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

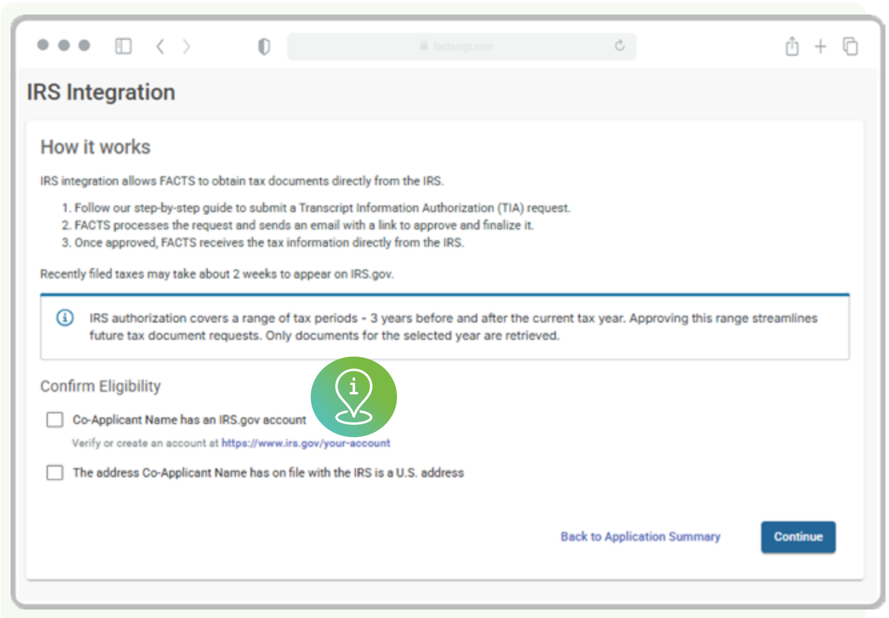


If you have a co-applicant, be sure to provide required documents for both the applicant and co-applicant.



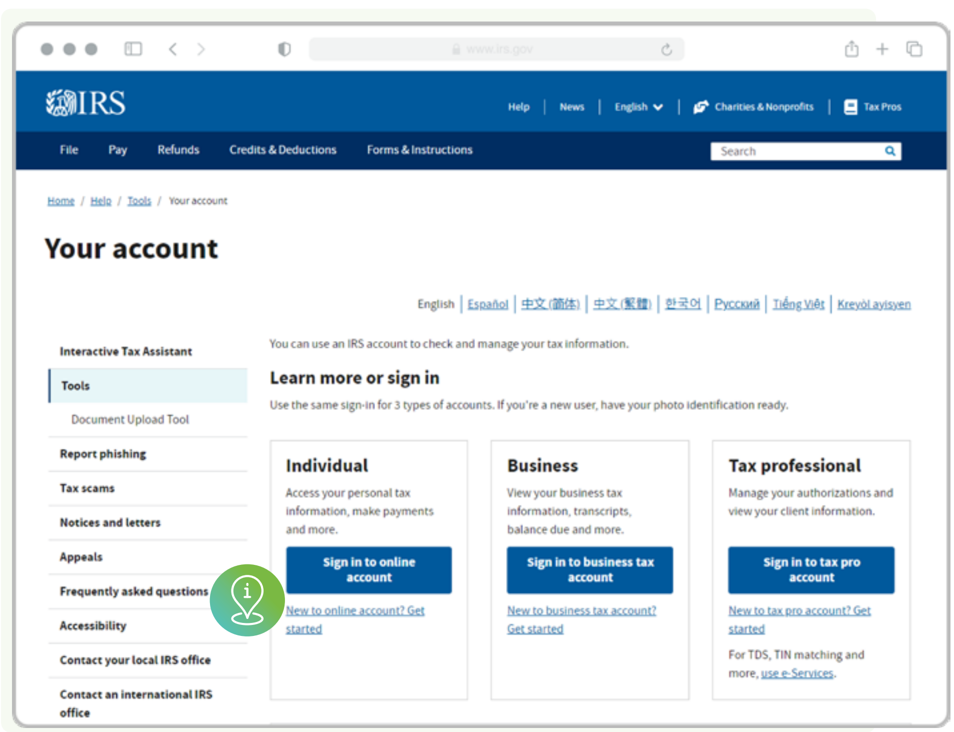
To get started, you will need to create or verify your IRS.gov account by clicking the link provided.

Step 1: Continued

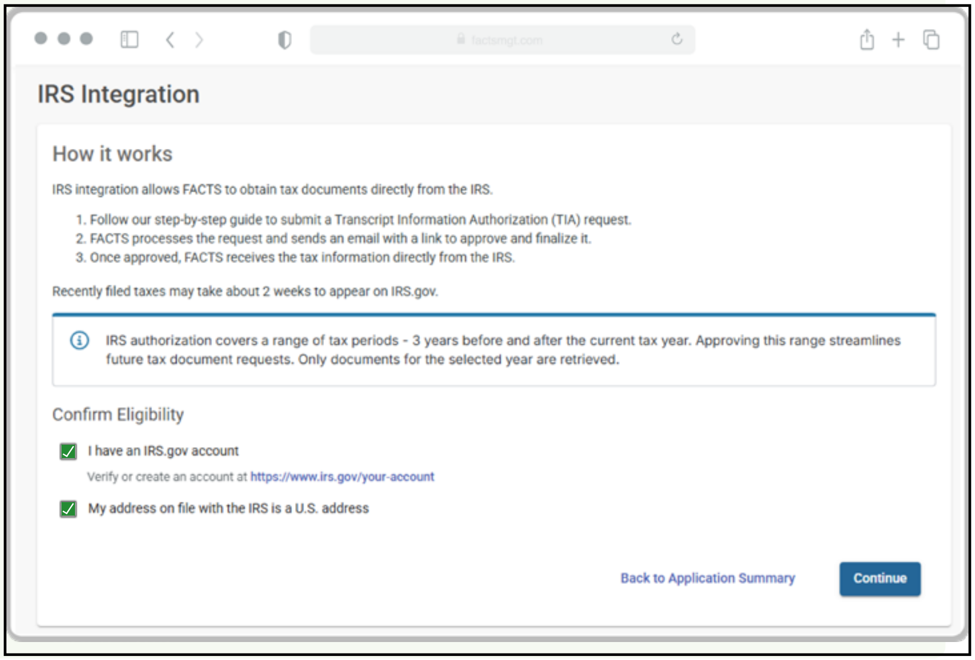


If you have a co-applicant, they'll follow the same steps with their own IRS.gov account.

Create or verify your IRS.gov account.



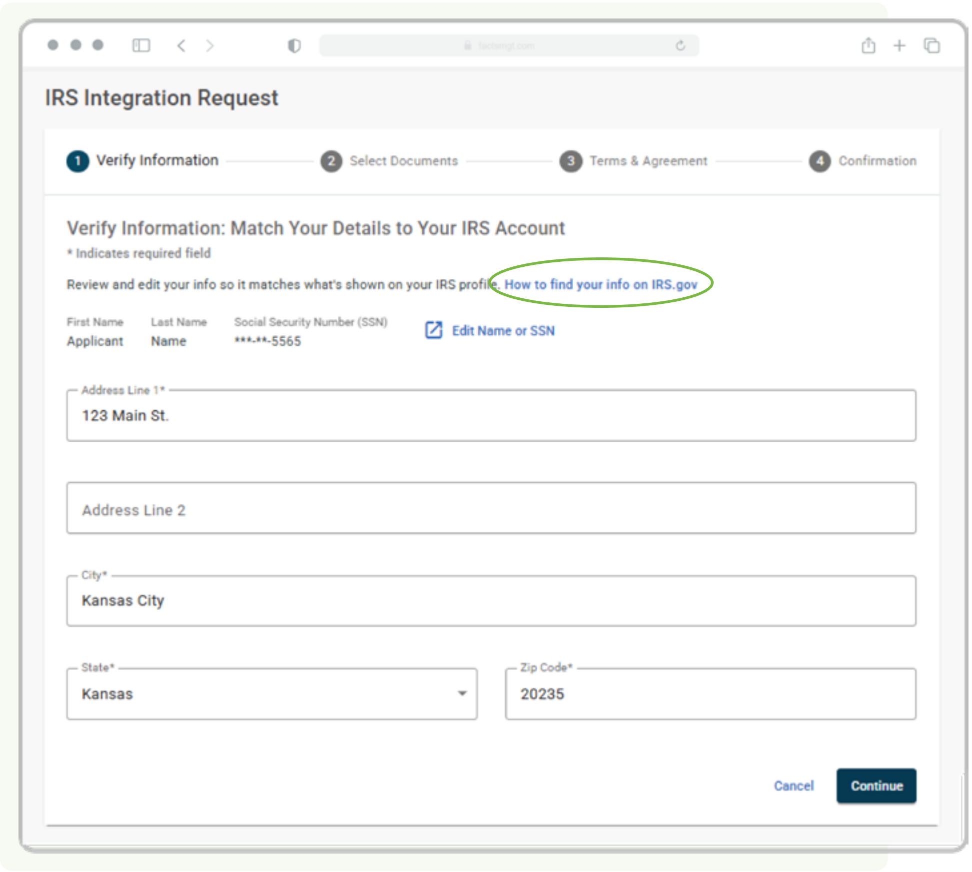
Step 1: Continued



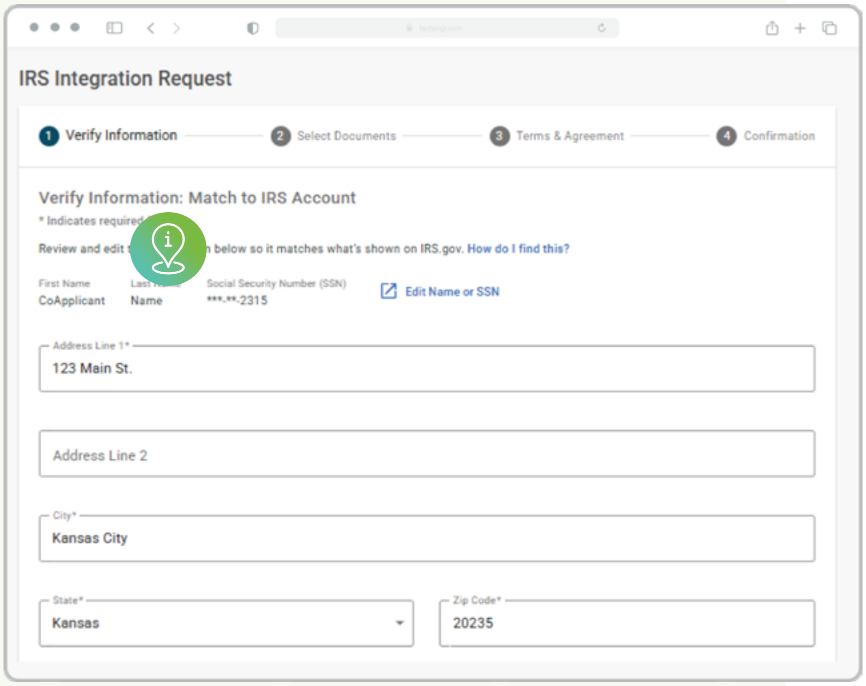
Confirm you have both an IRS.gov account and U.S. address to continue. If you have a co-applicant, they'll need to do the same.

Step 2: Information Verification

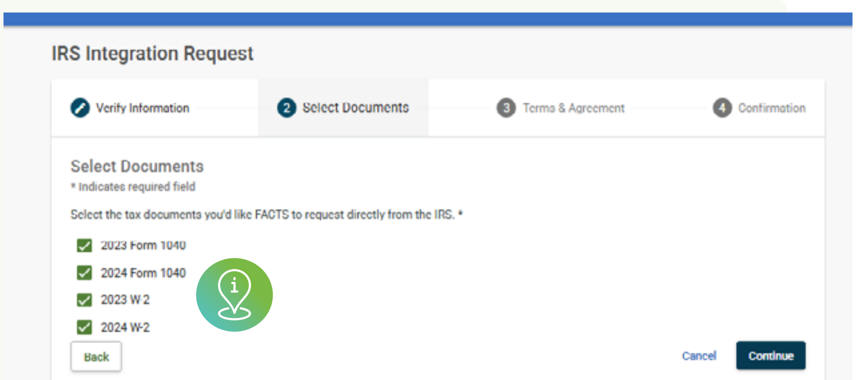
Applicants must verify that their SSN, name, and address exactly match what's on their IRS.gov account. Only individuals with a U.S. address are eligible. If you need help, click "How to find your info on IRS.gov" to check your account details.



Step 2: Information Verification



If you're completing this step as a co-applicant, the Co-Applicant's name and SSN will be shown instead.

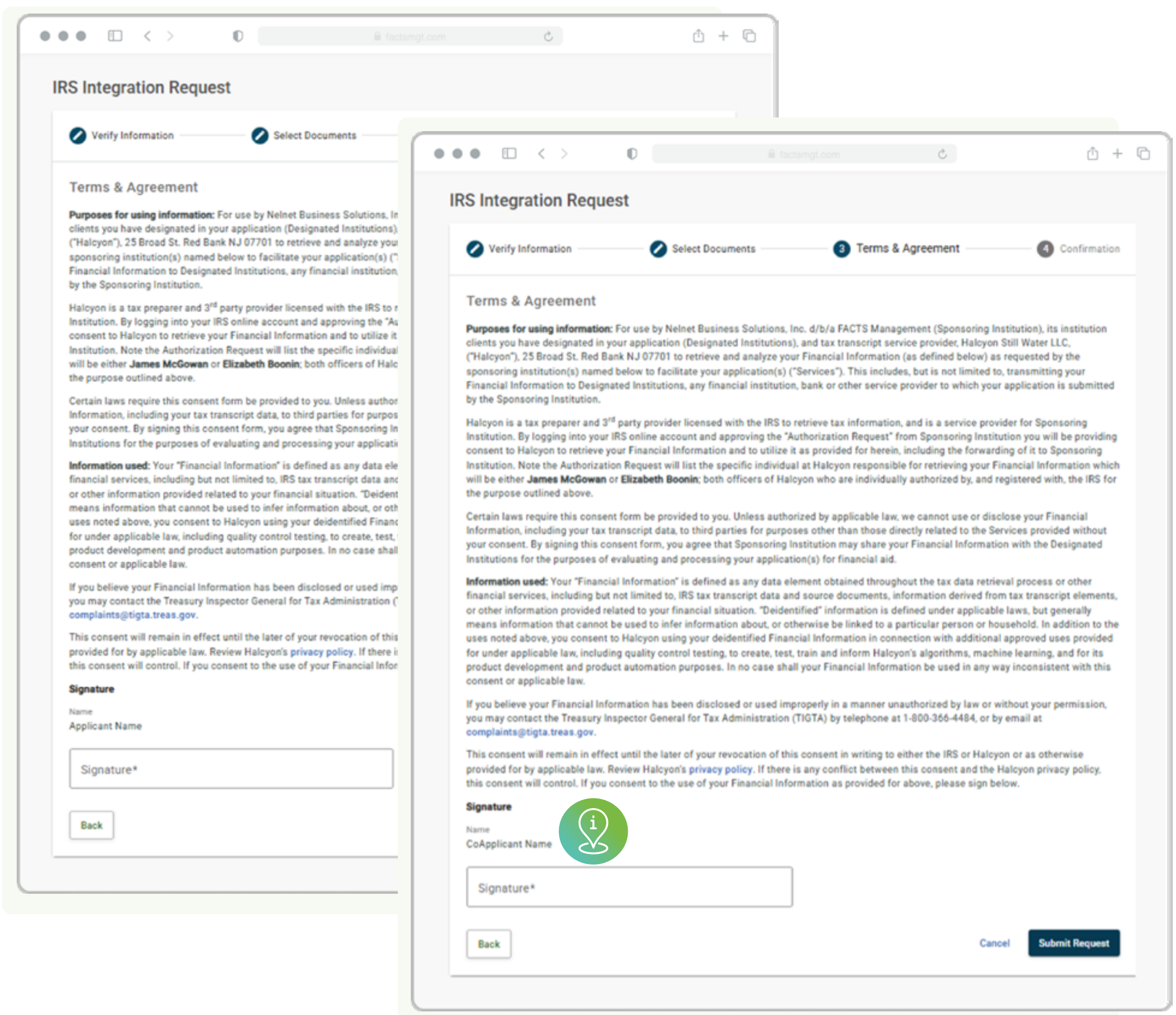


Check the boxes for the tax years you want to include with your application. Only documents available for the current applicant or co-applicant will be shown.

Step 3: Terms & Agreement

Applicant must type their name exactly as it appears on their application to submit their request. If their name doesn't match, they'll see a message letting them know the signature must match before they can click "Submit Request."

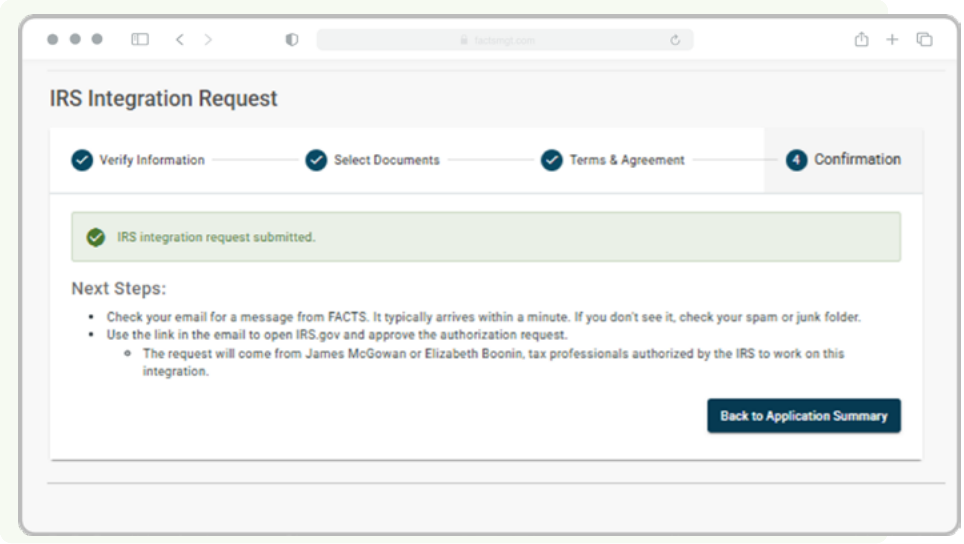
If submitting for the co-applicant, the co-applicant's name will display and must be entered as the electronic signature.



When submitting as a co-applicant, enter the co-applicant's name as the signature.

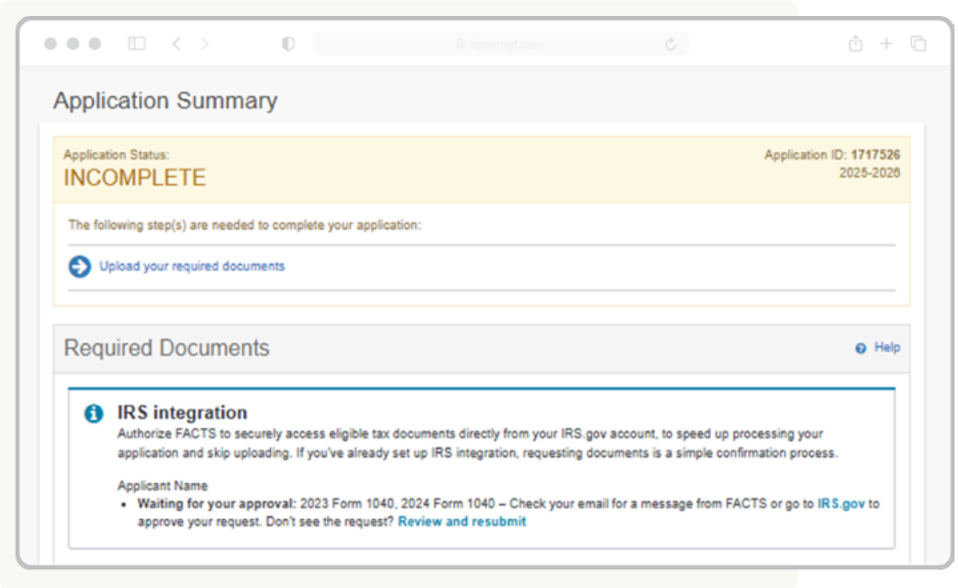
Step 4: Confirmation

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

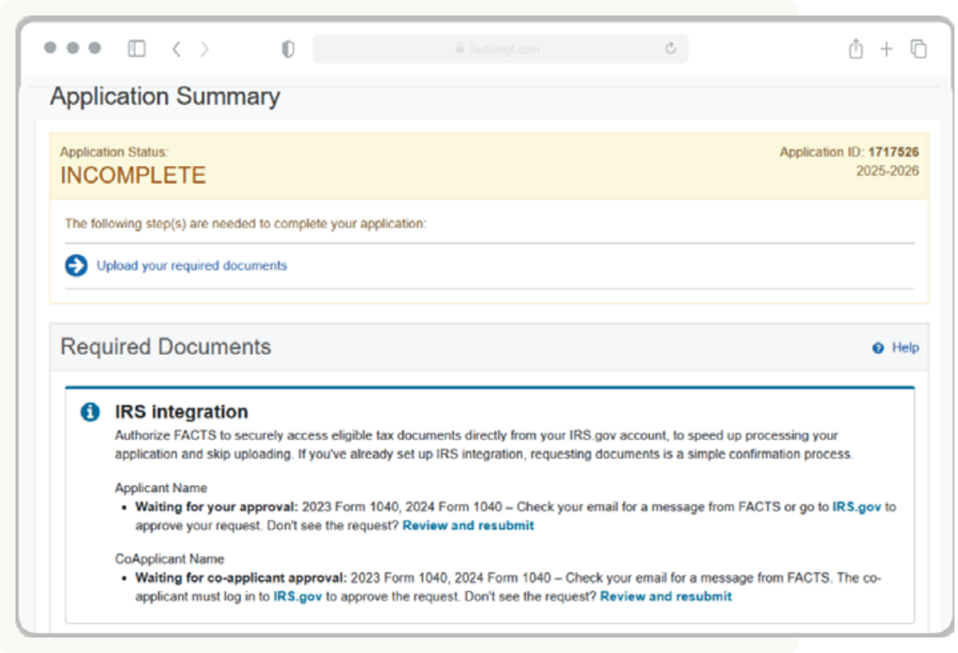


Step 5: Email Notification

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

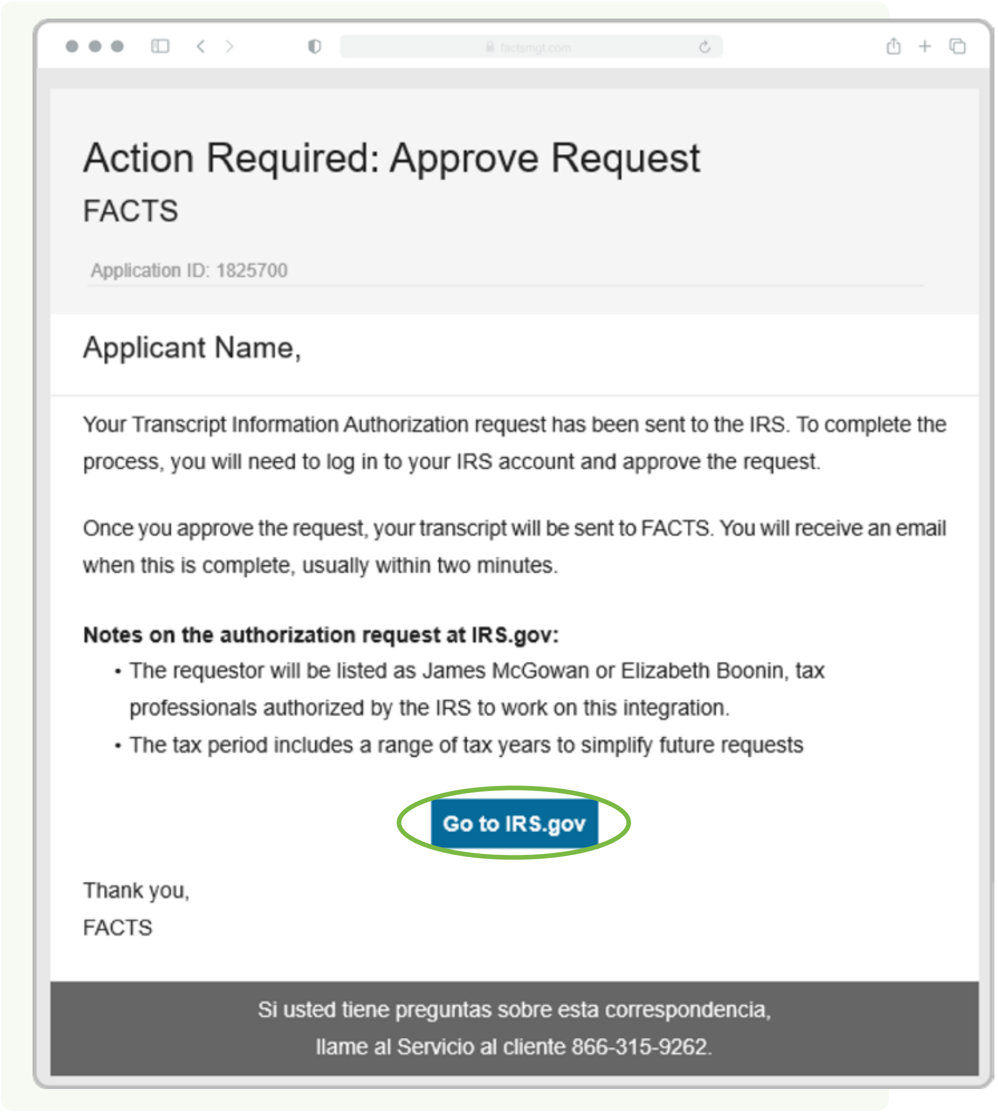


If you have a co-applicant, a separate IRS integration request will display under their name on the Application Summary page. You'll see notifications for both the applicant and co-applicant, making it easy to track the status of each request.



Step 5: Continued

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



Action Required: Approve Request

FACTS

Application ID: 1825700

Applicant Name,

Your Transcript Information Authorization request has been sent to the IRS. To complete the process, you will need to log in to your IRS account and approve the request.

Once you approve the request, your transcript will be sent to FACTS. You will receive an email when this is complete, usually within two minutes.

Notes on the authorization request at IRS.gov:

- The requestor will be listed as James McGowan or Elizabeth Boonin, tax professionals authorized by the IRS to work on this integration.
- The tax period includes a range of tax years to simplify future requests

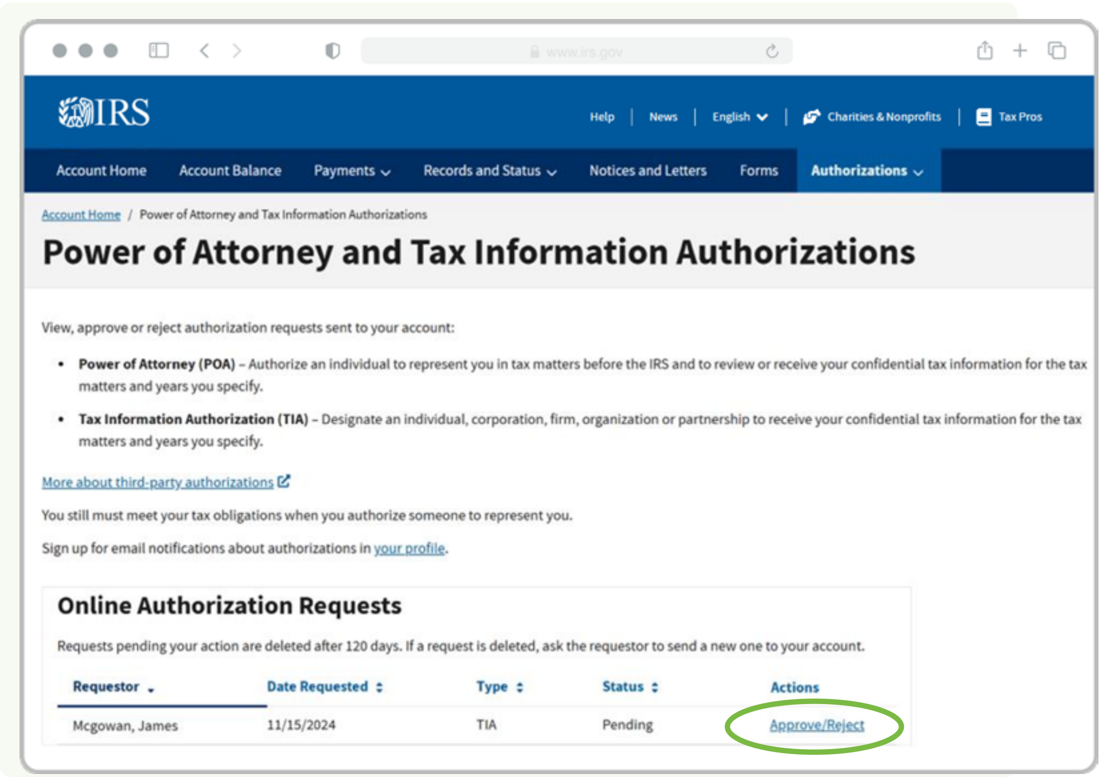
Go to IRS.gov

Thank you,
FACTS

Si usted tiene preguntas sobre esta correspondencia, llame al Servicio al cliente 866-315-9262.

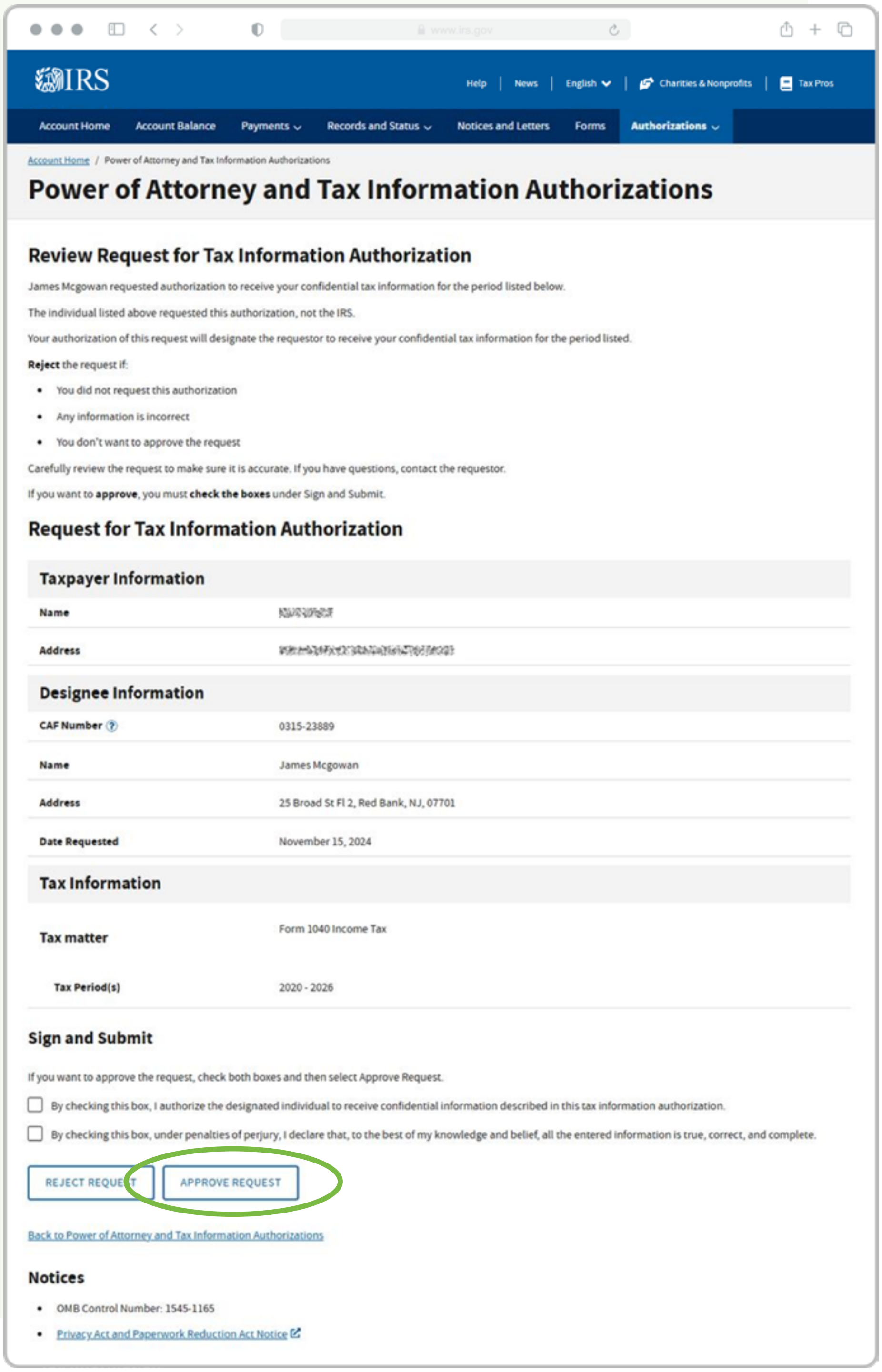
Step 6: Approve Authorization

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** and streamlined the process of submitting required tax information.



IRS

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Account Home / Power of Attorney and Tax Information Authorizations

Power of Attorney and Tax Information Authorizations

Review Request for Tax Information Authorization

James Mcgowan requested authorization to receive your confidential tax information for the period listed below.

The individual listed above requested this authorization, not the IRS.

Your authorization of this request will designate the requestor to receive your confidential tax information for the period listed.

Reject the request if:

- You did not request this authorization
- Any information is incorrect
- You don't want to approve the request

Carefully review the request to make sure it is accurate. If you have questions, contact the requestor.

If you want to **approve**, you must **check the boxes** under Sign and Submit.

Request for Tax Information Authorization

Taxpayer Information	
Name	[redacted]
Address	[redacted]

Designee Information	
CAF Number	0315-23889
Name	James Mcgowan
Address	25 Broad St Fl 2, Red Bank, NJ, 07701
Date Requested	November 15, 2024

Tax Information	
Tax matter	Form 1040 Income Tax
Tax Period(s)	2020 - 2026

Sign and Submit

If you want to approve the request, check both boxes and then select Approve Request.

- [ ] By checking this box, I authorize the designated individual to receive confidential information described in this tax information authorization.
- [ ] By checking this box, under penalties of perjury, I declare that, to the best of my knowledge and belief, all the entered information is true, correct, and complete.

REJECT REQUEST | APPROVE REQUEST

Back to Power of Attorney and Tax Information Authorizations

Notices

- OMB Control Number: 1545-1165
- Privacy Act and Paperwork Reduction Act Notice