

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





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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.
- 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.

Application Summary

Application Status: **INCOMPLETE** Application ID: 1718965 2025-2026

The following step(s) are needed to complete your application:

➔ Upload your required documents

Required Documents

IRS integration

Authorize FACTS to securely access eligible tax documents directly from your IRS.gov account, to speed up processing your application and skip uploading. If you've already set up IRS integration, requesting documents is a simple confirmation process.

Applicant Name

- Eligible documents: 2023 Form 1040, 2024 Form 1040, 2023 W-2, 2024 W-2 – [Request documents](#)

CoApplicant Name

- Eligible documents: 2023 Form 1040, 2024 Form 1040, 2023 W-2, 2024 W-2 – [Request documents](#)

Tax Documents

2023 Federal Tax Return - Applicant



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

IRS Integration

How it works

IRS integration allows FACTS to obtain tax documents directly from the IRS.

1. Follow our step-by-step guide to submit a Transcript Information Authorization (TIA) request.
2. FACTS processes the request and sends an email with a link to approve and finalize it.
3. Once approved, FACTS receives the tax information directly from the IRS.

Recently filed taxes may take about 2 weeks to appear on IRS.gov.

IRS authorization covers a range of tax periods - 3 years before and after the current tax year. Approving this range streamlines future tax document requests. Only documents for the selected year are retrieved.

Confirm Eligibility

☐ I have an IRS.gov account

Verify or create an account at <https://www.irs.gov/your-account>

☐ My address on file with the IRS is a U.S. address

[Back to Application Summary](#) [Continue](#)



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



Step 1: Continued

IRS Integration

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Recently filed taxes may take about 2 weeks to appear on IRS.gov.

Confirm Eligibility

- ☐ Co-Applicant Name has an IRS.gov account
Verify or create an account at <https://www.irs.gov/your-account>
- ☐ The address Co-Applicant Name has on file with the IRS is a U.S. address

[Back to Application Summary](#) [Continue](#)



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.

IRS

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Your account

English | Español | 中文(简体) | 中文(繁體) | 한국어 | Русский | Tiếng Việt | Kreyòl ayisyen

Interactive Tax Assistant

Tools

Document Upload Tool

Report phishing

Tax scams

Notices and letters

Appeals

Frequently asked questions

Accessibility

Contact your local IRS office

Contact an international IRS office

Learn more or sign in

You can use an IRS account to check and manage your tax information.

Use the same sign-in for 3 types of accounts. If you're a new user, have your photo identification ready.

Individual

Access your personal tax information, make payments and more.

[Sign in to online account](#)

[New to online account? Get started](#)

Business

View your business tax information, transcripts, balance due and more.

[Sign in to business tax account](#)

[New to business tax account? Get started](#)

Tax professional

Manage your authorizations and view your client information.

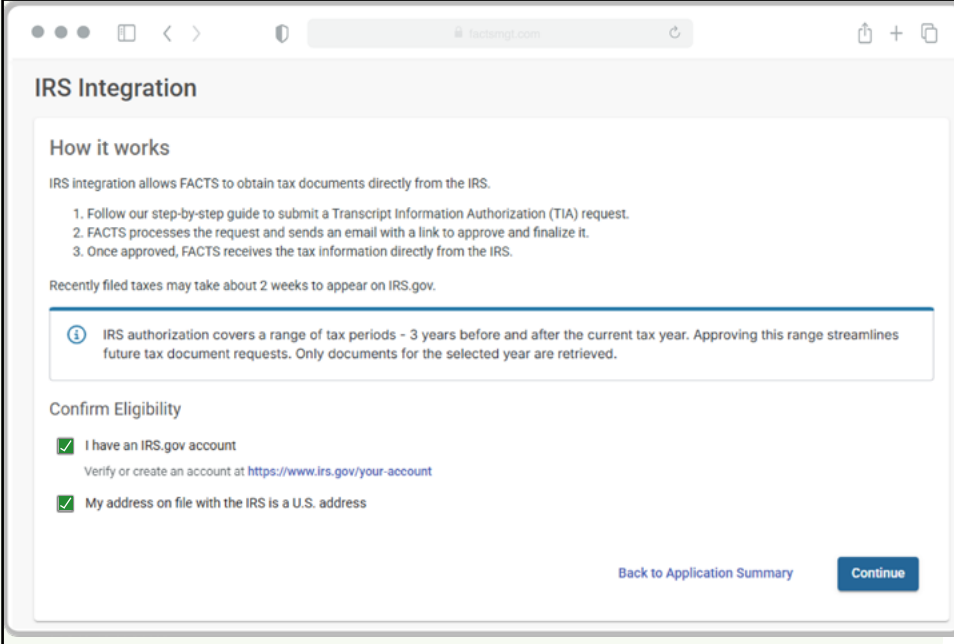
[Sign in to tax pro account](#)

[New to tax pro account? Get started](#)

For TDS, TIN matching and more, [use e-Services](#).



Step 1: Continued



IRS Integration

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Confirm Eligibility

- ☒ I have an IRS.gov account
Verify or create an account at <https://www.irs.gov/your-account>
- ☒ My address on file with the IRS is a U.S. address

[Back to Application Summary](#) [Continue](#)



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.

The screenshot shows a web browser window displaying the "IRS Integration Request" form. The form has a progress bar at the top with four steps: 1. Verify Information (active), 2. Select Documents, 3. Terms & Agreement, and 4. Confirmation. The main heading is "Verify Information: Match Your Details to Your IRS Account". Below this, a note states "* Indicates required field". A sub-heading reads "Review and edit your info so it matches what's shown on your IRS profile." followed by a link "How to find your info on IRS.gov" which is circled in green. The form contains several input fields: "First Name" (Applicant), "Last Name" (Name), "Social Security Number (SSN)" (***-**-5565), "Address Line 1*" (123 Main St.), "Address Line 2", "City*" (Kansas City), "State*" (Kansas), and "Zip Code*" (20235). There is a checkbox labeled "Edit Name or SSN" which is checked. At the bottom right, there are "Cancel" and "Continue" buttons.

Step 2: Information Verification

The screenshot shows a web browser window with the title "IRS Integration Request". The page has a progress bar at the top with four steps: 1. Verify Information (active), 2. Select Documents, 3. Terms & Agreement, and 4. Confirmation. Below the progress bar, the heading "Verify Information: Match to IRS Account" is followed by a note: "* Indicates required". A green information icon is placed over the text "Review and edit the information below so it matches what's shown on IRS.gov. How do I find this?". The form contains several fields: "First Name" and "Last Name" (both with "CoApplicant" below them), "Social Security Number (SSN)" (with the value "***-**-2315" and an "Edit Name or SSN" link), "Address Line 1*" (with the value "123 Main St."), "Address Line 2", "City*" (with the value "Kansas City"), "State*" (a dropdown menu showing "Kansas"), and "Zip Code*" (with the value "20235").



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

The screenshot shows the "IRS Integration Request" form at the "Select Documents" step. The progress bar at the top shows: 1. Verify Information, 2. Select Documents (active), 3. Terms & Agreement, and 4. Confirmation. The heading "Select Documents" is followed by a note: "* Indicates required field". Below this, the text reads: "Select the tax documents you'd like FACTS to request directly from the IRS. *". There is a list of four items, each with a checkbox and a year: "2023 Form 1040", "2024 Form 1040", "2023 W-2", and "2024 W-2". All four checkboxes are checked. A green information icon is placed over the "2023 W-2" item. At the bottom left is a "Back" button, and at the bottom right are "Cancel" and "Continue" buttons.



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.

The image displays two overlapping screenshots of the 'IRS Integration Request' web form. The left screenshot shows the 'Terms & Agreement' step, with the 'Name' field labeled 'Applicant Name'. The right screenshot shows the same step, but for a co-applicant, with the 'Name' field labeled 'CoApplicant Name' and a green circular icon with an 'i' next to it. Both screenshots show the 'Signature*' field and a 'Submit Request' button.

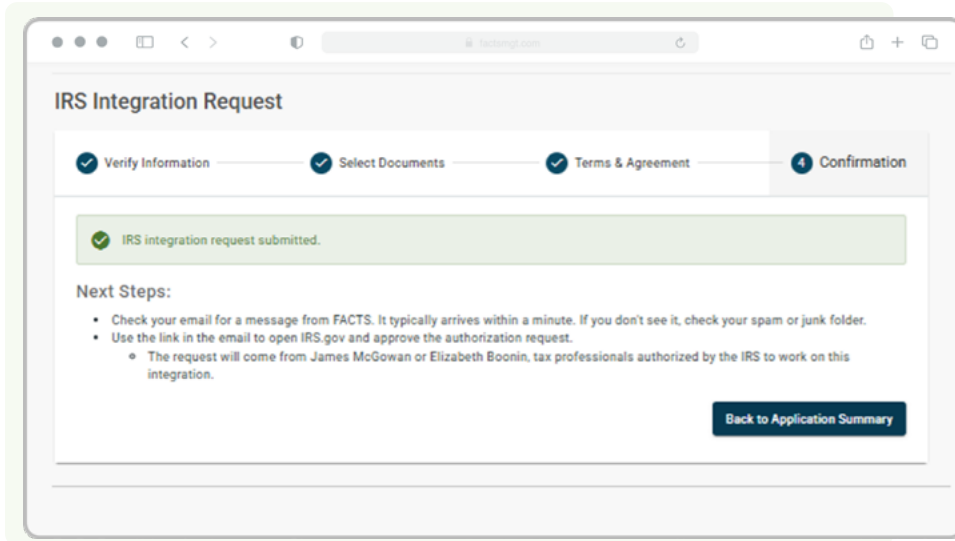


When submitting as a co-applicant, enter the co-applicant's name as the signature.



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.

The screenshot shows a web browser window displaying the 'Application Summary' page. At the top, the 'Application Status' is 'INCOMPLETE' in orange text, with the 'Application ID: 1717526' and '2025-2026' to its right. Below this, a message states: 'The following step(s) are needed to complete your application:'. A blue arrow icon points to the text 'Upload your required documents'. Further down, the 'Required Documents' section is visible, featuring an 'i' icon and the heading 'IRS integration'. The text explains that authorizing FACTS to access tax documents from an IRS.gov account speeds up processing. Below this, the 'Applicant Name' is listed, followed by a bullet point: 'Waiting for your approval: 2023 Form 1040, 2024 Form 1040 – Check your email for a message from FACTS or go to [IRS.gov](#) to approve your request. Don't see the request? [Review and resubmit](#)'. A 'Help' link is located in the top right corner of the 'Required Documents' section.

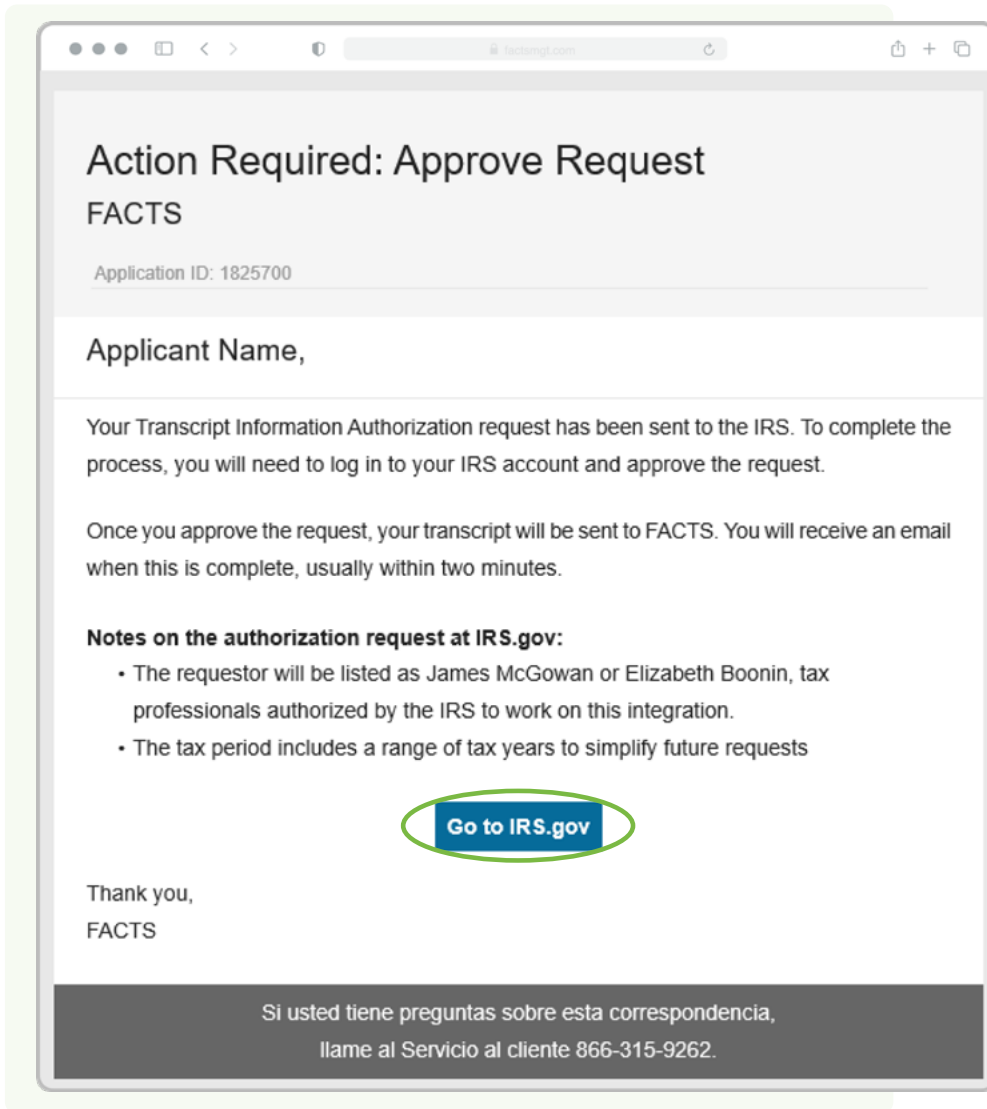
If you have a co-applicant, a separate IRS integration request will display under their name on the Application Summary page. You'll see notifications for both the applicant and co-applicant, making it easy to track the status of each request.

This screenshot is similar to the previous one but includes an additional section for a co-applicant. The 'Applicant Name' section remains the same. Below it, a 'CoApplicant Name' section is added, containing a bullet point: 'Waiting for co-applicant approval: 2023 Form 1040, 2024 Form 1040 – Check your email for a message from FACTS. The co-applicant must log in to [IRS.gov](#) to approve the request. Don't see the request? [Review and resubmit](#)'. The rest of the page, including the 'INCOMPLETE' status and the 'Upload your required documents' instruction, is identical to the previous screenshot.



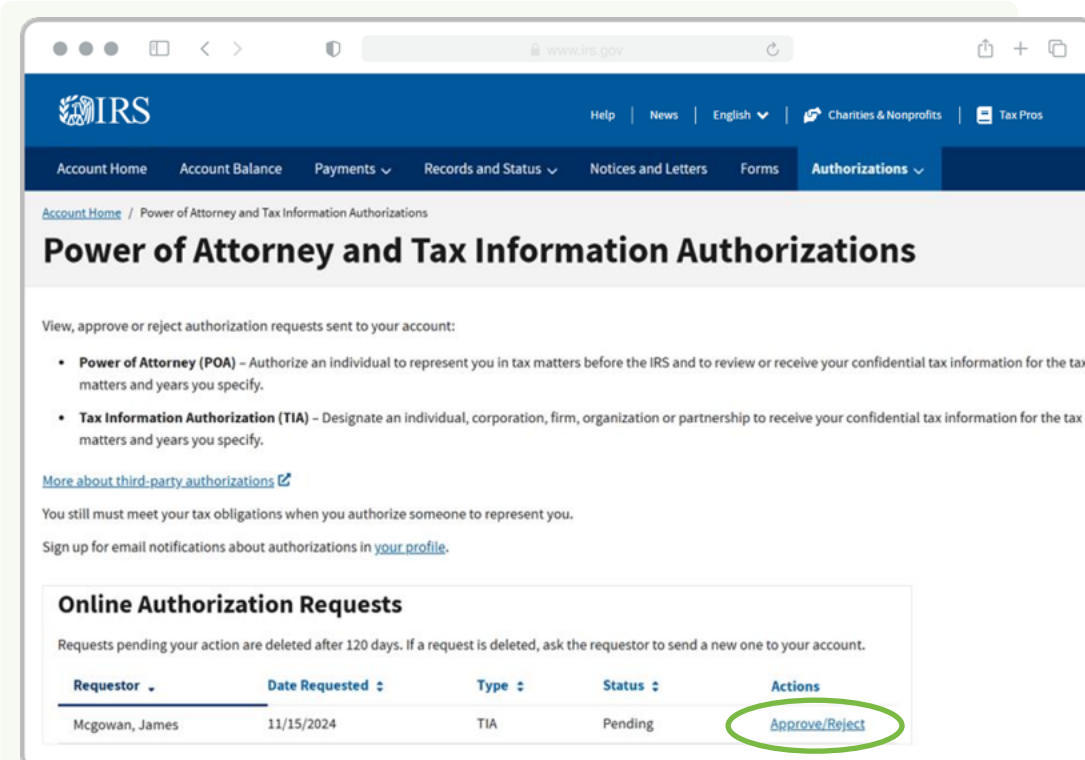
Step 5: Continued

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.



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.



The screenshot displays the IRS.gov website interface. The top navigation bar includes the IRS logo, a search bar, and links for Help, News, English, Charities & Nonprofits, and Tax Pros. Below this, a secondary navigation bar contains links for Account Home, Account Balance, Payments, Records and Status, Notices and Letters, Forms, and Authorizations. The main content area is titled 'Power of Attorney and Tax Information Authorizations' and provides instructions on how to view, approve, or reject authorization requests. It includes definitions for Power of Attorney (POA) and Tax Information Authorization (TIA). A section titled 'Online Authorization Requests' contains a table with the following data:

Requestor	Date Requested	Type	Status	Actions
Mcgowan, James	11/15/2024	TIA	Pending	Approve/Reject



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 | Account Balance | Payments | Records and Status | Notices and Letters | Forms | **Authorizations**

[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	JAMES MCGOWAN
Address	25 Broad St Fl 2, Red Bank, NJ, 07701

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](#)

