

IRS Integration Overview

Purpose	Review the IRS integration process and its eligibility requirements to streamline the submission of tax documents by securely connecting your application with IRS records, ensuring accuracy and compliance.
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FACTS Financial Aid Management is the new name for FACTS Grant & Aid, Grant & Aid, FGAA.

Overview

The IRS Integration feature allows applicants to streamline the process of submitting tax information required for their application by connecting directly with IRS records. This feature is useful for applicants who meet specific eligibility criteria and are applying for upcoming academic terms. Before using this feature, applicants must ensure they have an IRS.gov account and verify their personal details match their IRS profile. Learn the eligibility criteria and review the steps to complete the IRS Integration request.

Eligibility

Applicants must meet specific eligibility criteria to use the IRS integration feature. Review the eligibility criteria to understand why an applicant may or may not use the integration option.

Eligible If:	Not Eligible If:
The Y-1 or Y-2 Federal Tax Return is required for the Applicant as a single filer, or if the Applicant and Co-Applicant file jointly or separately.	- The application is hidden; the tax return is no longer required. - The Y-2 or Y-1 tax return has been uploaded. If any pages are submitted, the tax return is considered submitted (even if some pages or schedules are missing). - Applicant sent a request through the service on another application within the same term. - Tax return documents are being processed by data entry for the application. Includes uploaded transcripts, Form 1040s, Schedules 1-3, dependent statements.

Eligible If:	Not Eligible If:						
Tax return options <table> <tr> <th>Tax return</th><th>Description</th></tr> <tr> <td>Y-2</td><td>Federal Tax Return for the application term year minus 2. For example, the 2023 tax return shows as required for the 2025-2026 application year.</td></tr> <tr> <td>Y-1</td><td>Federal Tax Return for the application term year minus 1. For example, the 2024 tax return shows as required for the 2025-2026 application year.</td></tr> </table> • W2's for Y-1 or Y-2 for the Applicant as a single filer, or if the Applicant and Co-Applicant file jointly or separately. • Applying to the term 2025-2026 or later. • Application has been submitted.	Tax return	Description	Y-2	Federal Tax Return for the application term year minus 2. For example, the 2023 tax return shows as required for the 2025-2026 application year.	Y-1	Federal Tax Return for the application term year minus 1. For example, the 2024 tax return shows as required for the 2025-2026 application year.	
Tax return	Description						
Y-2	Federal Tax Return for the application term year minus 2. For example, the 2023 tax return shows as required for the 2025-2026 application year.						
Y-1	Federal Tax Return for the application term year minus 1. For example, the 2024 tax return shows as required for the 2025-2026 application year.						

IRS Integration steps

Review an overview of the steps to initiate and complete the IRS Integration process.

Get started

Eligible applicants must have a U.S. address and an IRS.gov account to use the IRS Integration. Without an account, the request is sent to the IRS however, FACTS will not receive return information. Applicants should create an IRS.gov account before submitting their request.

Information Verification

In the Information Verification step, applicants must ensure their Social Security Number, name, and address match their IRS profile. They can record a different address if needed, such as after a move.

Terms & Agreement

In the Terms & Agreement step, applicants review and agree to share their IRS tax transcript with FACTS. To submit, they must type their name exactly as it displays on their application. If the name does not match, a warning will appear.

Confirmation and Approve Authorization

After submitting the request, it is sent to Halcyon, who forwards it to the IRS. Applicants will receive an email to approve the request via their IRS.gov account. A "Request Pending" message will appear on the application summary page until approval
