

# 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

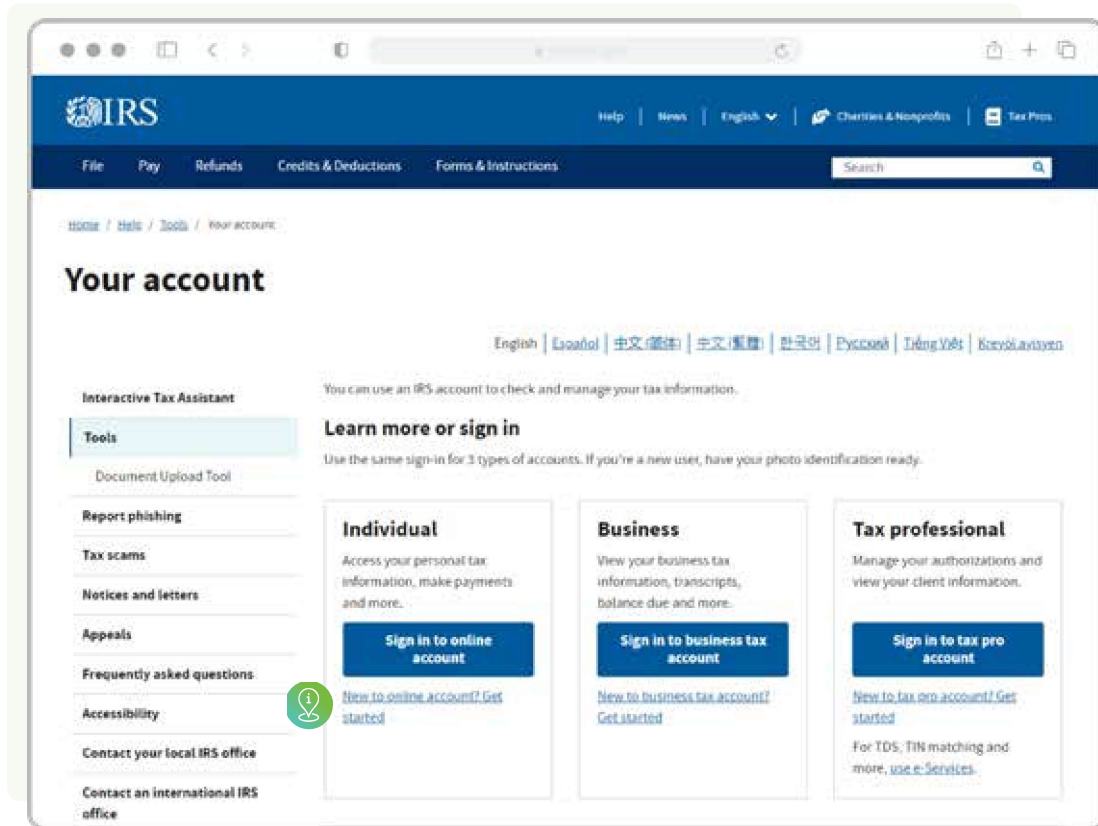
The new IRS Integration banner is displayed in the Application Summary.

The screenshot shows the 'Application Summary' page. At the top, the 'Application Status' is 'INCOMPLETE' and the 'Application ID' is '1710394 2025-2026'. A message states: 'The following step(s) are needed to complete your application: Upload your required documents'. Below this is the 'Required Documents' section, which features a blue banner for 'New IRS Integration' with the text: 'Authorize FACTS to securely access your 2023 1040 forms using direct IRS integration, to skip uploading your 1040 and significantly reduce processing time.' A 'Learn More' button is circled in green. Underneath, the 'Tax Documents' section lists '2023 Federal Tax Return' and '2023 W-2s'. The '2023 Federal Tax Return' is broken down into 'Form 1040 (Page 1)' and 'Form 1040 (Page 2)'. Each document has a circular status indicator: a red circle for 'Not Submitted', a yellow circle for 'In Process', and a green circle for 'Complete'. The '2023 W-2s' document has a red circle. At the bottom right is an 'Upload' button.

The screenshot shows the 'IRS Integration' page. It starts with a 'How It Works' section explaining that IRS integration allows FACTS to request tax information directly from the IRS, eliminating the need to upload documents and speeding up verification. It notes that FACTS will submit a Transcript Information Authorization (TIA) request to the IRS, requiring the user to log into their IRS.gov account and approve the request. It also states that IRS integration is currently available for 1040 forms, while W-2s and other documents must still be uploaded directly, with a two-week wait for information availability. The 'Requirements' section lists two items: 1. 'IRS.gov Account' (with a green information icon) and 2. 'United States Address'. A green information icon is also present next to the IRS.gov account requirement. At the bottom, there is a 'Back to Application Summary' link and a 'Get Started' button.

 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.

The screenshot shows a web browser window with the title "IRS Integration Request". The page has a progress bar at the top with three steps: "1 Information Verification" (active), "2 Terms & Agreement", and "3 Confirmation". Below the progress bar, the section is titled "Information Verification" with a note: "\* Indicates required field". A paragraph of instructions follows: "Verify that your name, social security number, and address match what is on your IRS account. If this information is not an exact match, you will need to update it or the request for authorization will not go through." A link "Where do I find this?" is circled in green. Below this, there are input fields for "First Name" (Sara), "Last Name" (Sands), and "Social Security Number (SSN)" (\*\*\*-\*\*-6526). To the right of the SSN field is a link "Edit Name or SSN". Below these are fields for "Address Line 1\*" (65 Sandy), "Address Line 2", "City\*" (Beach), "State\*" (South Carolina), and "Zip Code\*" (68239). At the bottom, there are "Back", "Cancel", and "Continue" buttons.

IRS Integration Request

1 Information Verification 2 Terms & Agreement 3 Confirmation

Information Verification

\* Indicates required field

Verify that your name, social security number, and address match what is on your IRS account. If this information is not an exact match, you will need to update it or the request for authorization will not go through. [Where do I find this?](#)

First Name Last Name Social Security Number (SSN) [Edit Name or SSN](#)

Sara Sands \*\*\*-\*\*-6526

Address Line 1\* 65 Sandy

Address Line 2

City\* Beach State\* South Carolina Zip Code\* 68239

Back Cancel Continue

## 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.

The screenshot shows a web browser window displaying the "IRS Integration Request" page. The page has a progress bar at the top with three steps: "1 Information Verification", "2 Terms & Agreement" (which is the current step), and "3 Confirmation". The "Terms & Agreement" section contains several paragraphs of text. The first paragraph, "Purposes for using information:", describes the use of financial information by Netnet Business Solutions, Inc. d/b/a FACTS Management and Halcyon Still Water LLC. The second paragraph describes Halcyon as a tax preparer and 3rd party provider licensed with the IRS. The third paragraph discusses the consent form and the specific individuals at Halcyon responsible for retrieving financial information: James McGowan or Elizabeth Boonin. The fourth paragraph states that certain laws require this consent form and that the user agrees to share financial information for evaluation and processing. The fifth paragraph, "Information used:", defines financial information and deidentified information. The sixth paragraph provides contact information for the Treasury Inspector General for Tax Administration (TIGTA). The seventh paragraph states that the consent will remain in effect until the user's revocation. At the bottom of the page, there is a "Signature" section with a "Name" field and a "Signature\*" field. A green circular icon with an 'i' is next to the "Signature\*" field. Below the signature fields are "Back" and "Cancel" buttons, and a "Submit Request" button.

IRS Integration Request

1 Information Verification 2 Terms & Agreement 3 Confirmation

### Terms & Agreement

**Purposes for using information:** For use by Netnet 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 3<sup>rd</sup> 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.treasury.gov](mailto:complaints@tigta.treasury.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\*

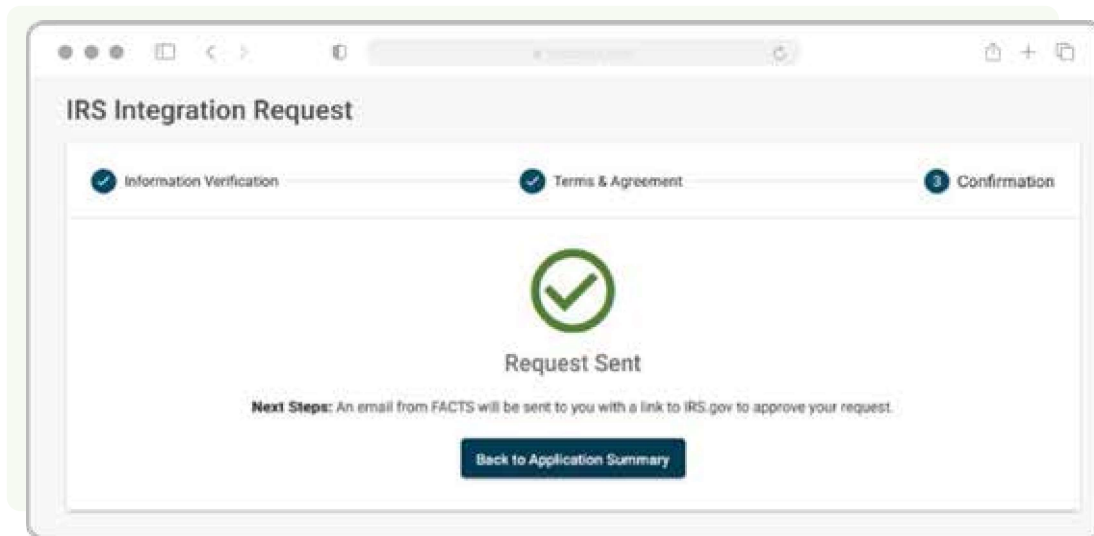
Back Cancel Submit Request



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

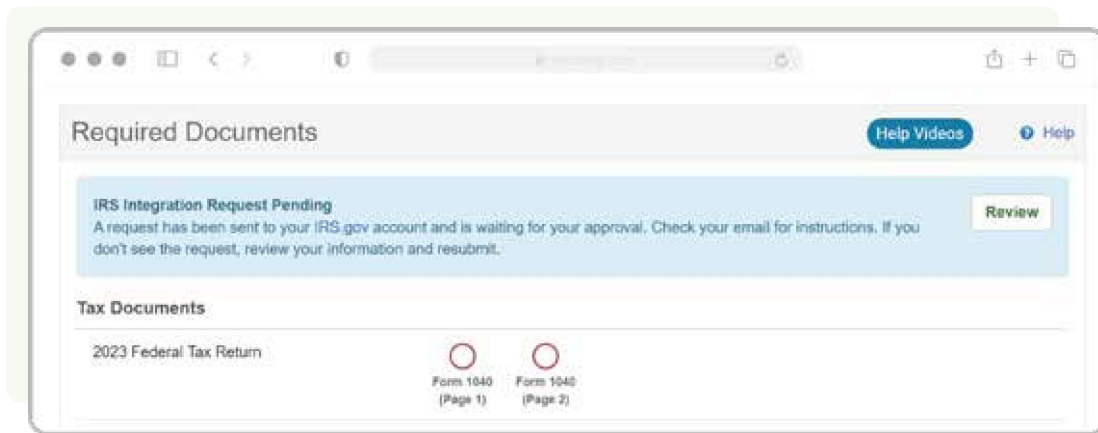
## Step 4: Confirmation

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

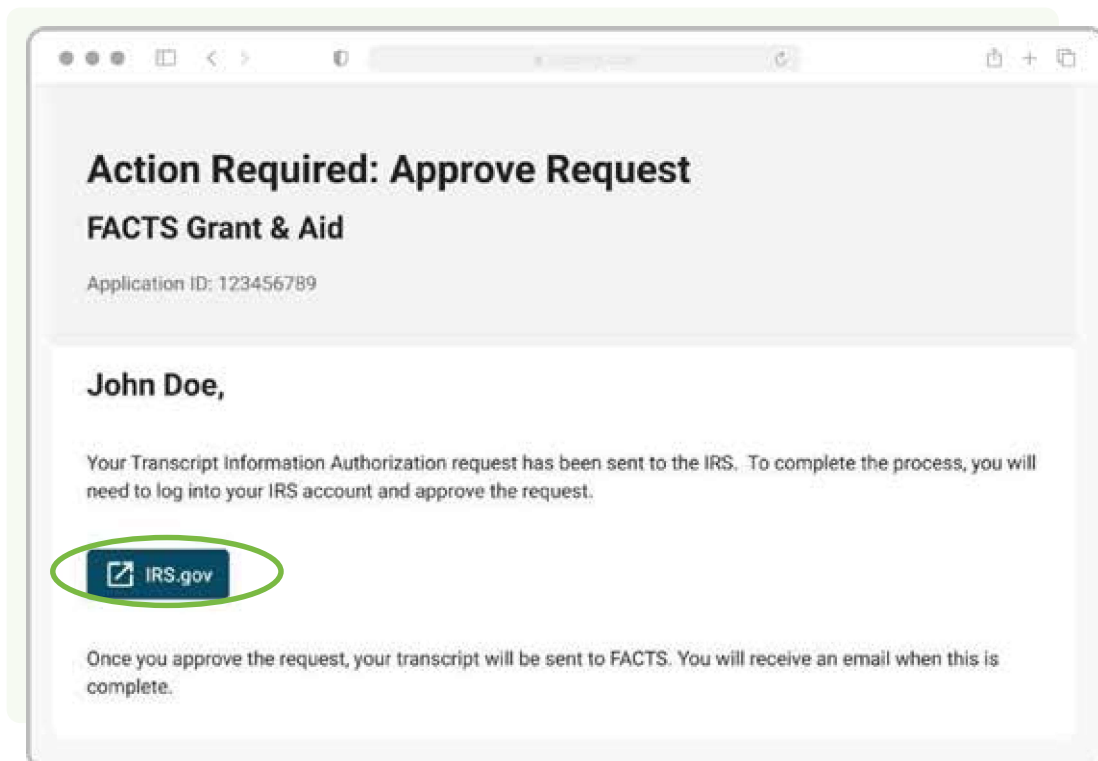


## Step 5: Email Notification

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



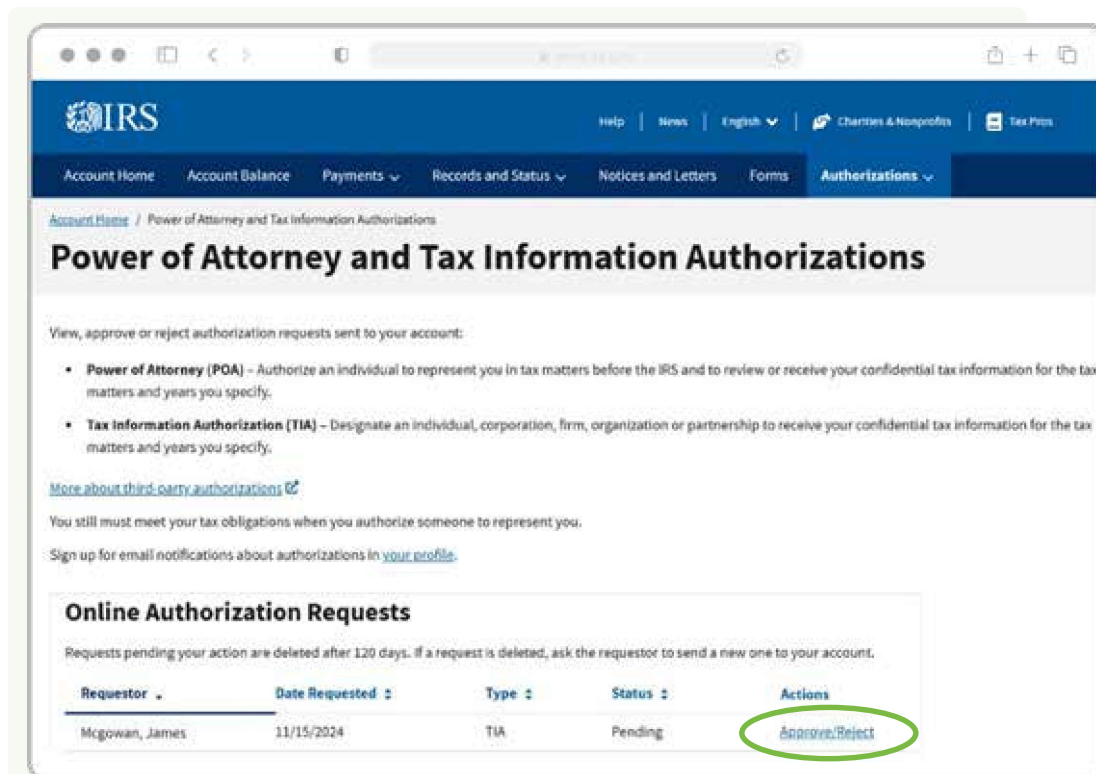
The applicant will receive an email from **FACTS Grant & Aid** with a subject line of **Action Required: Approve Request**. **Click the button** to go to the IRS.gov account to approve the request.





# 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.



The screenshot shows the IRS website's "Power of Attorney and Tax Information Authorizations" page. The page includes a navigation bar with the IRS logo and links to Help, News, English, Charities & Nonprofits, and Tax Pros. Below the navigation bar, there's a section titled "Power of Attorney and Tax Information Authorizations" with a subtitle "View, approve or reject authorization requests sent to your account:". This section contains two bullet points: "Power of Attorney (POA) - Authorize an individual to represent you in tax matters before the IRS and to review or receive your confidential tax information for the tax matters and years you specify." and "Tax Information Authorization (TIA) - Designate an individual, corporation, firm, organization or partnership to receive your confidential tax information for the tax matters and years you specify." Below this, there's a link "More about third-party authorizations" and a note "You still must meet your tax obligations when you authorize someone to represent you." and "Sign up for email notifications about authorizations in your profile." The main content area is titled "Online Authorization Requests" and includes a note "Requests pending your action are deleted after 120 days. If a request is deleted, ask the requestor to send a new one to your account." Below this is a table with the following data:

Requestor	Date Requested	Type	Status	Actions
Mcgowan, James	11/15/2024	TIA	Pending	<a href="#">Approve/Reject</a>

# 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.

The screenshot displays the IRS website's "Power of Attorney and Tax Information Authorizations" page. The page is titled "Review Request for Tax Information Authorization" and provides instructions for reviewing a request. It includes sections for "Request for Tax Information Authorization" with fields for Taxpayer Information, Designee Information, and Tax Information. The "Sign and Submit" section contains two checkboxes for authorization and a declaration, followed by "REJECT REQUEST" and "APPROVE REQUEST" buttons. The "APPROVE REQUEST" button is circled in green. A "Back to Power of Attorney and Tax Information Authorizations" link is also present.

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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	Rory Christ
Address	5833 S 19th Ct, Milwaukee, WI, 53221

Designee Information	
CAF Number (P)	0315-23889
Name	James McGowan
Address	15 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 - 2021

### 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](#)

