

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.

The screenshot shows a web browser window with the URL factsmgt.com. The page title is "Application Summary". The "Application Status" is "INCOMPLETE" and the "Application ID" is "1718965 2025-2026". A message states: "The following step(s) are needed to complete your application: Upload your required documents". Below this is a "Required Documents" section with a "Help Videos" button and a "Help" link. The "IRS integration" banner is highlighted, stating: "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." It lists "Applicant Name" and "CoApplicant Name" with "Eligible documents: 2023 Form 1040, 2024 Form 1040, 2023 W-2, 2024 W-2 - Request documents". A green information icon is visible. Below the banner is a "Tax Documents" section with "2023 Federal Tax Return - Applicant".



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

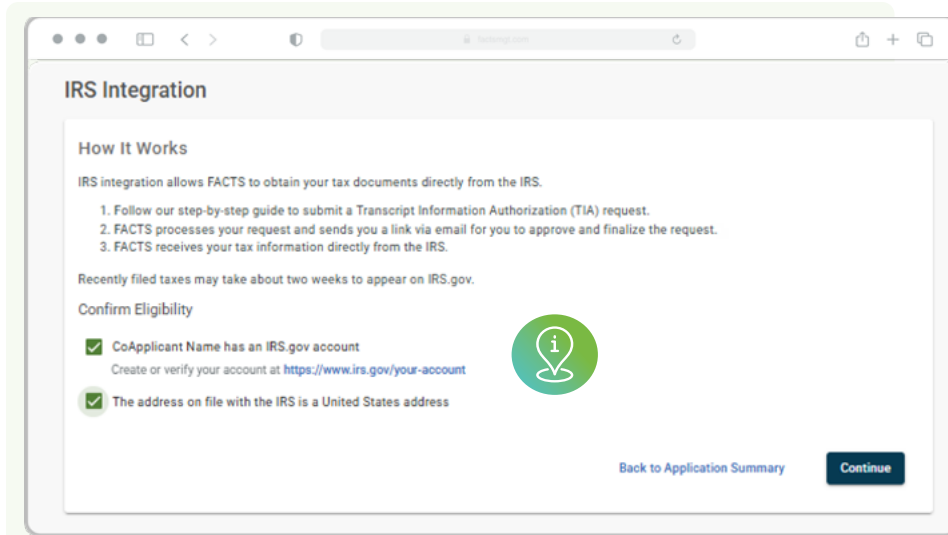
The screenshot shows a web browser window with the URL factsmgt.com. The page title is "IRS Integration". The "How It Works" section states: "IRS integration allows FACTS to obtain your tax documents directly from the IRS." It lists three steps: 1. Follow our step-by-step guide to submit a Transcript Information Authorization (TIA) request. 2. FACTS processes your request and sends you a link via email for you to approve and finalize the request. 3. FACTS receives your tax information directly from the IRS. It notes: "Recently filed taxes may take about two weeks to appear on IRS.gov." The "Confirm Eligibility" section has two checkboxes: "I have an IRS.gov account" (with a link to <https://www.irs.gov/your-account>) and "The address on file with the IRS is a United States address". A green information icon is visible. At the bottom are "Back to Application Summary" and "Continue" buttons.





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

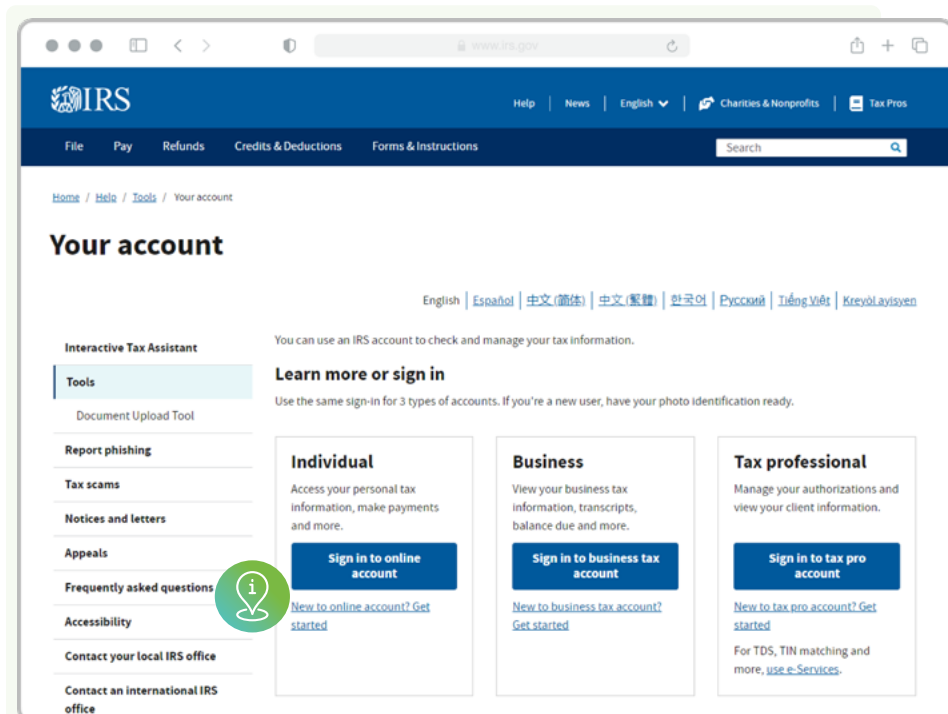


Step 1: Continued

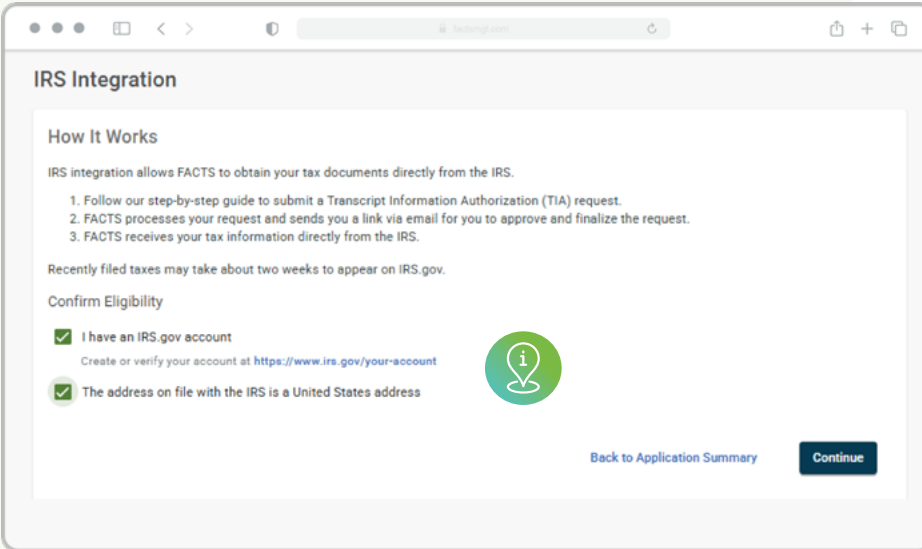


 If you have a co-applicant, they'll follow the same steps with their own IRS.gov account.

 Create or verify your IRS.gov account.



Step 1: Continued



IRS Integration

How It Works

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

1. Follow our step-by-step guide to submit a Transcript Information Authorization (TIA) request.
2. FACTS processes your request and sends you a link via email for you to approve and finalize the request.
3. FACTS receives your tax information directly from the IRS.

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

Confirm Eligibility

- ☒ I have an IRS.gov account
Create or verify your account at <https://www.irs.gov/your-account>
- ☒ The address on file with the IRS is a United States 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 application, specifically the 'Terms & Agreement' step. The left screenshot shows the form for a single applicant, with the 'Name' field labeled 'Applicant Name'. The right screenshot shows the form 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.

IRS Integration Request

Verify Information Select Documents **Terms & Agreement** Confirmation

Terms & Agreement

Purposes for using information: For use by Nelnet Business Solutions, Inc. clients you have designated in your application (Designated Institutions), ("Halcyon"), 25 Broad St. Red Bank NJ 07701 to retrieve and analyze your sponsoring institution(s) named below to facilitate your application(s) ("Financial Information to Designated Institutions, any financial institution, by the Sponsoring Institution.

Halcyon is a tax preparer and 3rd party provider licensed with the IRS to r Institution. By logging into your IRS online account and approving the "Au consent to Halcyon to retrieve your Financial Information and to utilize it Institution. Note the Authorization Request will list the specific individual will be either **James McGowan** or **Elizabeth Boonin**; both officers of Halc the purpose outlined above.

Certain laws require this consent form be provided to you. Unless author Information, including your tax transcript data, to third parties for purpos your consent. By signing this consent form, you agree that Sponsoring In Institutions for the purposes of evaluating and processing your applicati

Information used: Your "Financial Information" is defined as any data ele financial services, including but not limited to, IRS tax transcript data and or other information provided related to your financial situation. "Deident means information that cannot be used to infer information about, or oth uses noted above, you consent to Halcyon using your deidentified Finan for under applicable law, including quality control testing, to create, test, product development and product automation purposes. In no case shall consent or applicable law.

If you believe your Financial Information has been disclosed or used imp you may contact the Treasury Inspector General for Tax Administration (" complaints@tigta.treas.gov.

This consent will remain in effect until the later of your revocation of this provided for by applicable law. Review Halcyon's [privacy policy](#). If there i this consent will control. If you consent to the use of your Financial Infor

Signature

Name
Applicant Name

Signature*

Back

IRS Integration Request

Verify Information Select Documents **Terms & Agreement** 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
CoApplicant Name

Signature*

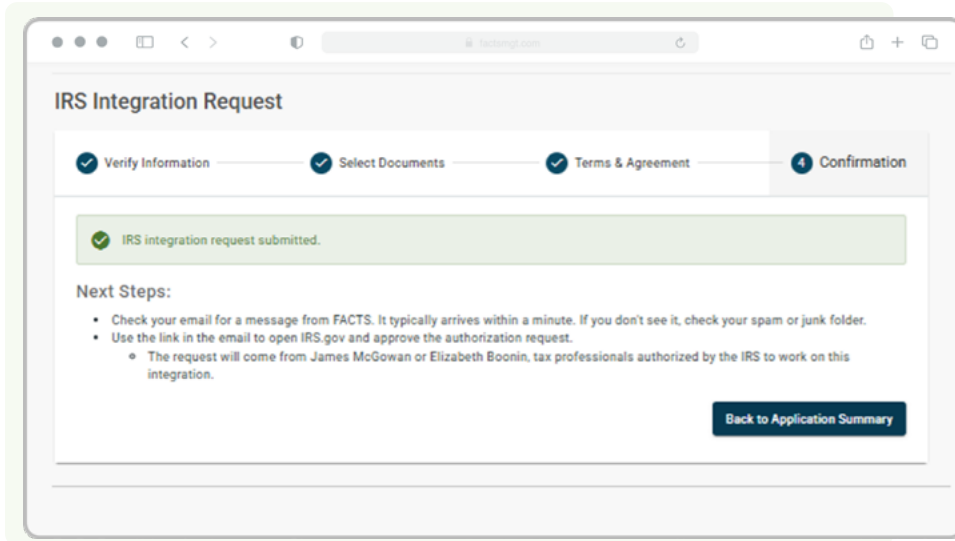
Back Cancel Submit Request



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 a blue information icon and the heading 'IRS integration'. The text explains that authorizing FACTS allows for direct access to tax documents from an IRS.gov account. 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](#)'.

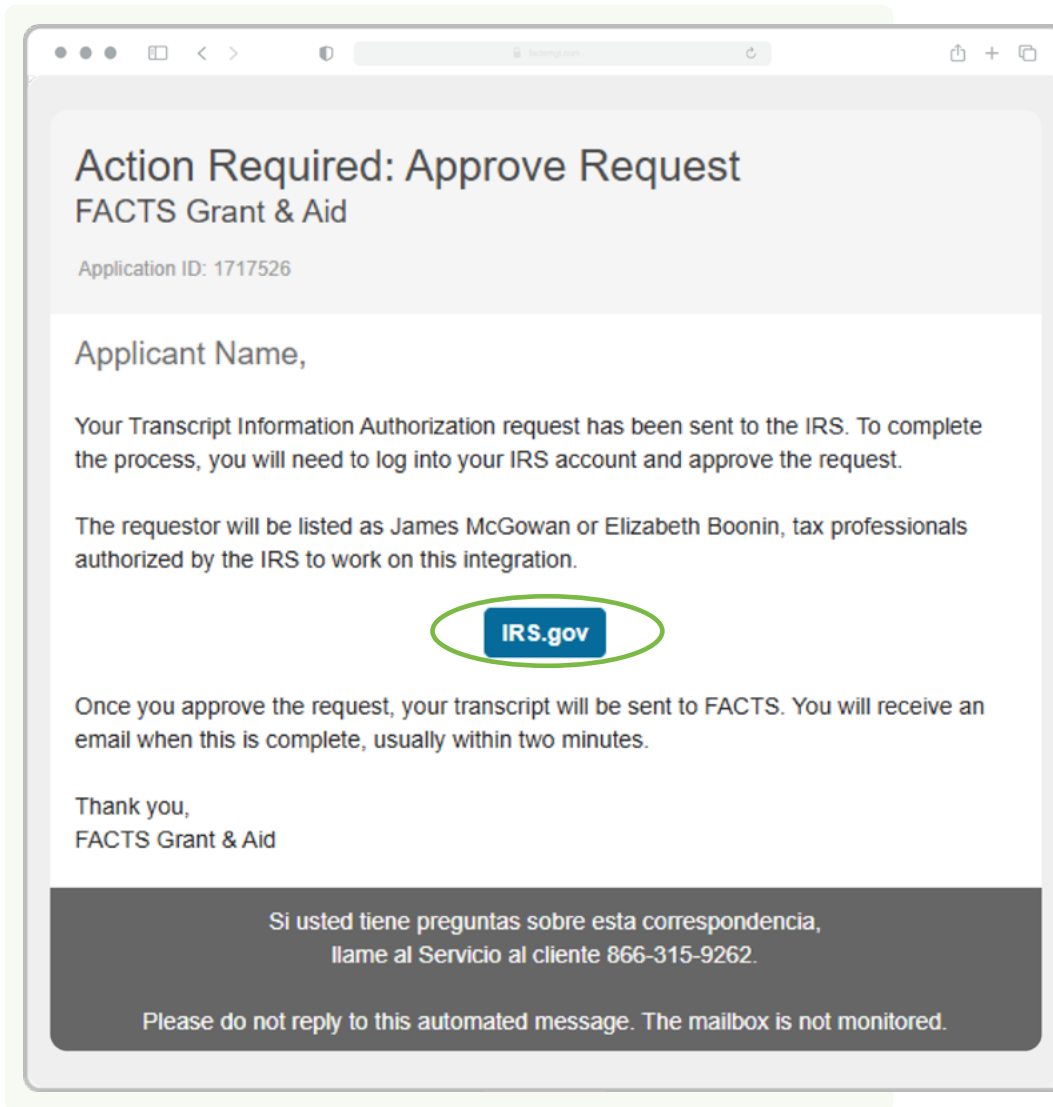
If you have a co-applicant, a separate IRS integration request will display under their name on the Application Summary page. You'll see notifications for both the applicant and co-applicant, making it easy to track the status of each request.

This screenshot is similar to the previous one but includes an additional section for a co-applicant. It shows the same 'Application Summary' page with 'INCOMPLETE' status and the 'Required Documents' section. Under the 'IRS integration' heading, there are two distinct sections. The first is for the 'Applicant Name' with the same 'Waiting for your approval' message. The second is for the 'CoApplicant Name' with a similar message: '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](#)'.



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 shows the IRS.gov website with the 'Power of Attorney and Tax Information Authorizations' page. The page includes a navigation bar with links to Account Home, Account Balance, Payments, Records and Status, Notices and Letters, Forms, and Authorizations. The main heading is 'Power of Attorney and Tax Information Authorizations'. Below this, there is a section titled 'View, approve or reject authorization requests sent to your account:' which lists two types of authorizations: Power of Attorney (POA) and Tax Information Authorization (TIA). A link 'More about third-party authorizations' is provided. Below this, there is a section titled 'Online Authorization Requests' which states that requests pending action are deleted after 120 days. A table with the following data is shown:

| 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

Help | News | English | Charities & Nonprofits | Tax Pros

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](#)

