

Simplify Your Application with IRS Integration



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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, such as joint filers, and are applying for upcoming academic terms. Before using this feature, applicants must ensure they have an IRS.gov account, US address, and verify their personal details match their IRS profile. Learn and review the steps to complete the IRS Integration request.

Am I eligible to use this feature?

You are eligible if:	You are not eligible if:
<ul style="list-style-type: none">• You have a U.S. address and an IRS.gov account.• You have submitted your prior prior year (current year minus 2) federal tax return. For example, if you are applying for the 20252026 school year, you must have completed a 2023 tax return.• You are applying to the 2025-2026 school year or later.• Your application has been submitted.	<ul style="list-style-type: none">• Your application is hidden, making a tax return no longer required.• Your tax return has already been submitted (even if some pages are missing).• You sent a request through this service on another application within the same term.• Tax return documents are already being processed for your application. This includes uploaded transcripts, form 1040s, schedules 1-3, and dependent statements.

Ready to get started?

If you are eligible to use the IRS Integration, follow the steps on the next page to get started.

How it works: IRS Integration allows FACTS to request your information directly from the IRS. This eliminates the need to upload your tax document and speeds up the verification process.

To enable IRS integration, FACTS will submit a Transcript Information Authorization (TIA) request to the IRS. You will need to log into your IRS.gov account and approve the request. Once approved, the requested information will be sent to FACTS.

IRS integration is currently available for 1040 forms. If your application requires W-2 or other tax documents, they will need to be uploaded directly. If you just filed your taxes, it takes approximately two weeks before your information is available.

Requirements:

1. **IRS.gov Account** - An IRS account is required for authorization. You can create or verify your account at the following: <https://www.irs.gov/your-account>.
2. **United States Address** - Your address on file with the IRS must be in the United States. If you do not have an IRS account, you can create one at <https://www.irs.gov/your-account>.

Information Verification: Check that the social security number, name, and address entered into your application match the information in your [IRS.gov](#) account.

Terms and Agreement: Review the terms and agree to share your IRS tax transcript with FACTS. To submit this agreement, type your name exactly as it displays in your application. If the name does not match, a warning will appear.

Confirmation: After you submit your request, the system will create an order that automatically goes to the IRS on behalf of FACTS. You will receive an email notice to approve the request once the order has been sent.

Email Notification: Once the request has been sent by the IRS, you will receive an email directing you to approve the authorization in your [IRS.gov](#) account.

Approve Authorization: From the email, log into your [IRS.gov](#) account, click Authorizations in the top right navigation, then scroll down to Online Authorization Requests and click Approve.

Questions?

Please reach out to your school with any questions about the process.

FACTSmgt.com/products/financial-management/financial-aid/