



# FACTS Grant & Aid Application Tax Return Requirements

Families completing a Grant & Aid Application must upload tax documentation, including a Federal Tax Return, applicable schedules, and necessary forms. FACTS Management reviews the forms and alerts you if additional documents are needed.

## Forms & Schedules

The examples below may not be applicable to all applicants. No need to be a tax expert, upload all documents included in your Federal Tax Return file and the system identifies required items.

- **Form 1040**
- **Schedule C**
- **Schedule E**
- **Form 1065**
- **Dependent Statement**
- **Schedule F**
- **Form 1041**
- **Form 1120S**
- **Schedules 1 & 3**
- **Form 4562**
- **Schedule K-1**
- **Form 8825**

## Application Summary

The Application Summary displays the application status and required documents. The school or organization determines the exact tax year to upload. Upon submission of the application, a notice is sent via email advising of the tax year required. Use the Help icon to view the list of forms and access links to the IRS website. Return to FACTS at any time to view the application status and tax document requirements in the Application Summary.

### Application Summary

Application Status:  
**INCOMPLETE**

Application ID: **1705178**  
2020-2021

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

[➔ Upload your required documents](#)

#### Required Documents

Tax Documents

2020 Federal Tax Return - Carmen	<div>○ Form 1040 (Page 1)</div>	<div>○ Form 1040 (Page 2)</div>
2020 Federal Tax Return - James	<div>○ Form 1040 (Page 1)</div>	<div>○ Form 1040 (Page 2)</div>
2020 W-2s - Carmen	<div>○ W-2</div>	

○  
Divorce Decree ⓘ  
Sample Institution

○  
Document

○ Not Submitted

🔄 In Process

✅ Complete

❌ Waived

Upload

The completion of the Grant & Aid Application is dependent on the submission of the required tax documents. Upload all documents in your tax return file. Ensure the following documents are included in the file.

## 1040 U.S. Individual Income Tax Return

Pages 1 and 2 of the [1040 Federal Tax Return](#) determine which additional documents are required.

Starting with page 1 of Form 1040, review lines 8 & 10. Any amount listed on lines 8 or 10 requires a [Schedule 1](#). Filers with more than 4 dependents listed on Form 1040 must submit the Dependent Statement.

The same line items are reviewed for the **2021 & 2022** tax years.

Form <b>1040</b>		Department of the Treasury—Internal Revenue Service (99)		<b>2021</b>		OMB No. 1545-0074		IRS Use Only—Do not write or staple in this space.	
<b>Filing Status</b> <input type="checkbox"/> Single <input type="checkbox"/> Married filing jointly <input type="checkbox"/> Married filing separately (MFS) <input type="checkbox"/> Head of household (HOH) <input type="checkbox"/> Qualifying widow(er) (QW) Check only one box. If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QW box, enter the child's name if the qualifying person is a child but not your dependent ▶									
Your first name and middle initial			Last name			Your social security number			
If joint return, spouse's first name and middle initial			Last name			Spouse's social security number			
Home address (number and street). If you have a P.O. box, see instructions.						Apt. no.		<b>Presidential Election Campaign</b> Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund. <input type="checkbox"/> You <input type="checkbox"/> Spouse	
City, town, or post office. If you have a foreign address, also complete spaces below.				State		ZIP code			
Foreign country name		Foreign province/state/country		Foreign postal code					
At any time during 2021, did you receive, sell, exchange, or otherwise dispose of any financial interest in any virtual currency? <input type="checkbox"/> Yes <input type="checkbox"/> No									
<b>Standard Deduction</b> <input type="checkbox"/> Someone can claim: <input type="checkbox"/> You as a dependent <input type="checkbox"/> Your spouse as a dependent <input type="checkbox"/> Spouse itemizes on a separate return or you were a dual-status alien									
<b>Age/Blindness</b> You: <input type="checkbox"/> Were born before January 2, 1957 <input type="checkbox"/> Are blind Spouse: <input type="checkbox"/> Was born before January 2, 1957 <input type="checkbox"/> Is blind									
<b>Dependents</b> (see instructions): If more than four dependents, see instructions and check here ▶ <input type="checkbox"/>									
(1) First name		Last name		(2) Social security number		(3) Relationship to you		(4) <input checked="" type="checkbox"/> if qualifies for (see instructions): Child tax credit Credit for other dependents	
								<input type="checkbox"/> <input type="checkbox"/>	
								<input type="checkbox"/> <input type="checkbox"/>	
								<input type="checkbox"/> <input type="checkbox"/>	
								<input type="checkbox"/> <input type="checkbox"/>	
<b>1</b> Wages, salaries, tips, etc. Attach Form(s) W-2 . . . . . <b>1</b>									
<b>2a</b> Tax-exempt interest . . . . . <b>2a</b> <b>b</b> Taxable interest . . . . . <b>2b</b>									
<b>3a</b> Qualified dividends . . . . . <b>3a</b> <b>b</b> Ordinary dividends . . . . . <b>3b</b>									
<b>4a</b> IRA distributions . . . . . <b>4a</b> <b>b</b> Taxable amount . . . . . <b>4b</b>									
<b>5a</b> Pensions and annuities . . . . . <b>5a</b> <b>b</b> Taxable amount . . . . . <b>5b</b>									
<b>6a</b> Social security benefits . . . . . <b>6a</b> <b>b</b> Taxable amount . . . . . <b>6b</b>									
<b>7</b> Capital gain or (loss). Attach Schedule D if required. If not required, check here ▶ <input type="checkbox"/> <b>7</b>									
<b>8</b> Other income from Schedule 1, line 10 . . . . . <b>8</b>									
<b>9</b> Add lines 1, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your <b>total income</b> . . . . . ▶ <b>9</b>									
<b>10</b> Adjustments to income from Schedule 1, line 26 . . . . . <b>10</b>									
<b>11</b> Subtract line 10 from line 9. This is your <b>adjusted gross income</b> . . . . . ▶ <b>11</b>									
<b>12a</b> <b>Standard deduction or itemized deductions</b> (from Schedule A) . . . . . <b>12a</b>									
<b>b</b> Charitable contributions if you take the standard deduction (see instructions) <b>12b</b>									
<b>c</b> Add lines 12a and 12b . . . . . <b>12c</b>									
<b>13</b> Qualified business income deduction from Form 8995 or Form 8995-A . . . . . <b>13</b>									
<b>14</b> Add lines 12c and 13 . . . . . <b>14</b>									
<b>15</b> <b>Taxable income.</b> Subtract line 14 from line 11. If zero or less, enter -0- . . . . . <b>15</b>									
For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see separate instructions. Cat. No. 11320B Form <b>1040</b> (2021)									

On page 2, review line 31. Any amount listed on line 31 indicates all pages of the [Schedule 3](#) are required.

Form 1040 (2021)		Page <b>2</b>	
<b>16</b>	<b>Tax</b> (see instructions). Check if any from Form(s): <b>1</b> <input type="checkbox"/> 8814 <b>2</b> <input type="checkbox"/> 4972 <b>3</b> <input type="checkbox"/> . . .	<b>16</b>	
<b>17</b>	Amount from Schedule 2, line 3 . . . . .	<b>17</b>	
<b>18</b>	Add lines 16 and 17 . . . . .	<b>18</b>	
<b>19</b>	Nonrefundable child tax credit or credit for other dependents from Schedule 8812 . . . . .	<b>19</b>	
<b>20</b>	Amount from Schedule 3, line 8 . . . . .	<b>20</b>	
<b>21</b>	Add lines 19 and 20 . . . . .	<b>21</b>	
<b>22</b>	Subtract line 21 from line 18. If zero or less, enter -0- . . . . .	<b>22</b>	
<b>23</b>	Other taxes, including self-employment tax, from Schedule 2, line 21 . . . . .	<b>23</b>	
<b>24</b>	Add lines 22 and 23. This is your <b>total tax</b> . . . . . ▶	<b>24</b>	
<b>25</b>	Federal income tax withheld from:		
<b>a</b>	Form(s) W-2 . . . . .	<b>25a</b>	
<b>b</b>	Form(s) 1099 . . . . .	<b>25b</b>	
<b>c</b>	Other forms (see instructions) . . . . .	<b>25c</b>	
<b>d</b>	Add lines 25a through 25c . . . . .	<b>25d</b>	
<b>26</b>	2021 estimated tax payments and amount applied from 2020 return . . . . .	<b>26</b>	
<b>27a</b>	Earned income credit (EIC) . . . . .	<b>27a</b>	
	Check here if you were born after January 1, 1998, and before January 2, 2004, and you satisfy all the other requirements for taxpayers who are at least age 18, to claim the EIC. See instructions ▶ <input type="checkbox"/>		
<b>b</b>	Nontaxable combat pay election . . . . .	<b>27b</b>	
<b>c</b>	Prior year (2019) earned income . . . . .	<b>27c</b>	
<b>28</b>	Refundable child tax credit or additional child tax credit from Schedule 8812 . . . . .	<b>28</b>	
<b>29</b>	American opportunity credit from Form 8863, line 8 . . . . .	<b>29</b>	
<b>30</b>	Recovery rebate credit. See instructions . . . . .	<b>30</b>	
<b>31</b>	Amount from Schedule 3, line 15 . . . . .	<b>31</b>	
<b>32</b>	Add lines 27a and 28 through 31. These are your <b>total other payments and refundable credits</b> . . . . . ▶	<b>32</b>	
<b>33</b>	Add lines 25d, 26, and 32. These are your <b>total payments</b> . . . . . ▶	<b>33</b>	
<b>Refund</b>	<b>34</b> If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you <b>overpaid</b> . . . . .	<b>34</b>	
	<b>35a</b> Amount of line 34 you want <b>refunded to you</b> . If Form 8888 is attached, check here . . . ▶ <input type="checkbox"/>	<b>35a</b>	
	▶ <b>b</b> Routing number <input type="text"/> ▶ <b>c</b> Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings		
	▶ <b>d</b> Account number <input type="text"/>		
	<b>36</b> Amount of line 34 you want <b>applied to your 2022 estimated tax</b> . . . ▶ <b>36</b>		
<b>Amount You Owe</b>	<b>37</b> <b>Amount you owe.</b> Subtract line 33 from line 24. For details on how to pay, see instructions . . . ▶	<b>37</b>	
	<b>38</b> Estimated tax penalty (see instructions) . . . . . ▶ <b>38</b>		
<b>Third Party Designee</b>	Do you want to allow another person to discuss this return with the IRS? See instructions . . . . . ▶ <input type="checkbox"/> <b>Yes. Complete below.</b> <input type="checkbox"/> <b>No</b>		
	Designee's name ▶	Phone no. ▶	Personal identification number (PIN) ▶ <input type="text"/>
<b>Sign Here</b>	Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.		
	Your signature	Date	Your occupation
	Spouse's signature. If a joint return, <b>both</b> must sign.		Date
	Spouse's occupation		If the IRS sent you an Identity Protection PIN, enter it here (see inst.) ▶ <input type="text"/>
	Spouse's occupation		If the IRS sent your spouse an Identity Protection PIN, enter it here (see inst.) ▶ <input type="text"/>
	Phone no.	Email address	
<b>Paid Preparer Use Only</b>	Preparer's name	Preparer's signature	Date
	Firm's name ▶	PTIN	Check if: <input type="checkbox"/> Self-employed
	Firm's address ▶	Phone no.	Firm's EIN ▶
Go to <a href="http://www.irs.gov/Form1040">www.irs.gov/Form1040</a> for instructions and the latest information.			
Form <b>1040</b> (2021)			

# Schedule 1

The [Schedule 1](#) is a 2-page document, review Lines 3, 5, and 6.

- **Line 3** indicates an income or loss from a sole proprietorship business.
  - Any amount listed on line 3 requires a [Schedule C](#).
  - Multiple Schedule C's may be required. The total income from the schedules must equal the amount listed on Line 3 of the Schedule 1.
- **Line 5** indicates an income or loss from any of the following: rental real estate, an S-Corporation, and/or a partnership.
  - Any amount listed on line 5 requires a [Schedule E](#). FACTS reviews the Schedule E and may request additional documentation to complete the business review.
- **Line 6** indicates an income or loss from a farm.
  - Any amount listed on line 6 requires a [Schedule F](#).

SCHEDULE 1 (Form 1040)		Additional Income and Adjustments to Income		OMB No. 1545-0074	
Department of the Treasury Internal Revenue Service		Attach to Form 1040, 1040-SR, or 1040-NR. Go to <a href="http://www.irs.gov/Form1040">www.irs.gov/Form1040</a> for instructions and the latest information.		2022 Attachment Sequence No. 01	
Name(s) shown on Form 1040, 1040-SR, or 1040-NR			Your social security number		
<b>Part I Additional Income</b>					
1	Taxable refunds, credits, or offsets of state and local income taxes		1		
2a	Alimony received		2a		
b	Date of original divorce or separation agreement (see instructions):				
3	Business income or (loss). Attach Schedule C		3		
4	Other gains or (losses). Attach Form 4797		4		
5	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E		5		
6	Farm income or (loss). Attach Schedule F		6		
7	Unemployment compensation		7		
8	Other income:				
a	Net operating loss	8a			
b	Gambling	8b			
c	Cancellation of debt	8c			
d	Foreign earned income exclusion from Form 2555	8d			
e	Income from Form 8853	8e			
f	Income from Form 8889	8f			
g	Alaska Permanent Fund dividends	8g			
h	Jury duty pay	8h			
i	Prizes and awards	8i			
j	Activity not engaged in for profit income	8j			
k	Stock options	8k			
l	Income from the rental of personal property if you engaged in the rental for profit but were not in the business of renting such property	8l			
m	Olympic and Paralympic medals and USOC prize money (see instructions)	8m			
n	Section 951(a) inclusion (see instructions)	8n			
o	Section 951A(a) inclusion (see instructions)	8o			
p	Section 461(f) excess business loss adjustment	8p			
q	Taxable distributions from an ABL account (see instructions)	8q			
r	Scholarship and fellowship grants not reported on Form W-2	8r			
s	Nontaxable amount of Medicaid waiver payments included on Form 1040, line 1a or 1d	8s			
t	Pension or annuity from a nonqualified deferred compensation plan or a nongovernmental section 457 plan	8t			
u	Wages earned while incarcerated	8u			
z	Other income. List type and amount:	8z			
9	Total other income. Add lines 8a through 8z		9		
10	Combine lines 1 through 7 and 9. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 8		10		

For Paperwork Reduction Act Notice, see your tax return instructions. Cat. No. 71479F Schedule 1 (Form 1040) 2022