

Families completing a Financial 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	 Form 1040 (Page 1)	 Form 1040 (Page 2)
2020 Federal Tax Return - James	 Form 1040 (Page 1)	 Form 1040 (Page 2)
2020 W-2s - Carmen	 W-2	

Supplemental Documents

Divorce Decree ?

Sample Institution

Document

☐ Not Submitted
☒ In Process
☒ Complete
☐ Waived

Upload

Help

The completion of the Financial 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 **2024 & 2025** tax years.

Form **1040** Department of the Treasury—Internal Revenue Service **2025** OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

For the year Jan. 1–Dec. 31, 2025, or other tax year beginning . 2025, ending . 20 See separate instructions.

☐ Filed pursuant to section 301.9100-2 ☐ Combat zone ☐ Deceased MM / DD / YYYY Spouse MM / DD / YYYY

☐ Other

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. Check here if your main home, and your spouse's if filing a joint return, was in the U.S. for more than half of 2025. ☐

City, town, or post office. If you have a foreign address, also complete spaces below. State ZIP code

Foreign country name Foreign province/state/county Foreign postal code

Filing Status ☐ Single ☐ Head of household (HOH) ☐ Qualifying surviving spouse (QSS)

Check only one box. ☐ Married filing jointly (even if only one had income) ☐ Married filing separately (MFS). Enter spouse's SSN above and full name here: _____ If you checked the HOH or QSS box, enter the child's name if the qualifying person is a child but not your dependent: _____

☐ If treating a nonresident alien or dual-status alien spouse as a U.S. resident for the entire tax year, check the box and enter their name (see instructions and attach statement if required): _____

Digital Assets At any time during 2025, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (See instructions.) ☐ Yes ☐ No

Dependents (see instructions) If more than four dependents, see instructions and check here ☐

	Dependent 1	Dependent 2	Dependent 3	Dependent 4
(1) First name				
(2) Last name				
(3) SSN				
(4) Relationship				
(5) Check if lived with you more than half of 2025	(a) ☐ Yes (b) ☐ And in the U.S.	(a) ☐ Yes (b) ☐ And in the U.S.	(a) ☐ Yes (b) ☐ And in the U.S.	(a) ☐ Yes (b) ☐ And in the U.S.
(6) Check if	☐ Full-time student ☐ Permanently and totally disabled	☐ Full-time student ☐ Permanently and totally disabled	☐ Full-time student ☐ Permanently and totally disabled	☐ Full-time student ☐ Permanently and totally disabled
(7) Credits	☐ Child tax credit ☐ Credit for other dependents	☐ Child tax credit ☐ Credit for other dependents	☐ Child tax credit ☐ Credit for other dependents	☐ Child tax credit ☐ Credit for other dependents

☐ Check if your filing status is MFS or HOH and you lived apart from your spouse for the last 6 months of 2025, or you are legally separated according to your state law under a written separation agreement or a decree of separate maintenance and you did not live in the same household as your spouse at the end of 2025.

Income Attach Form(s) W-2 here. Also attach Forms W-2G and 1099-R if tax was withheld. If you did not get a Form W-2, see instructions.

1a	Total amount from Form(s) W-2, box 1 (see instructions)	1a	
b	Household employee wages not reported on Form(s) W-2	1b	
c	Tip income not reported on line 1a (see instructions)	1c	
d	Medicaid waiver payments not reported on Form(s) W-2 (see instructions)	1d	
e	Taxable dependent care benefits from Form 2441, line 26	1e	
f	Employer-provided adoption benefits from Form 8839, line 31	1f	
g	Wages from Form 8919, line 6	1g	
h	Other earned income (see instructions). Enter type and amount: _____	1h	
i	Nontaxable combat pay election (see instructions)	1i	
z	Add lines 1a through 1h	1z	
2a	Tax-exempt interest	2a	
3a	Qualified dividends	3a	
c	Check if your child's dividends are included in 1 ☐ Line 3a	2 ☐ Line 3b	
4a	IRA distributions	b Taxable amount	4b
c	Check if (see instructions)	2 ☐ QCD 3 ☐	
5a	Pensions and annuities	b Taxable amount	5b
c	Check if (see instructions)	2 ☐ PSO 3 ☐	
6a	Social security benefits	b Taxable amount	6b
c	If you elect to use the lump-sum election method, check here (see instructions)		
d	If you are married filing separately and lived apart from your spouse the entire year (see inst.), check here ☐		
7a	Capital gain or (loss). Attach Schedule D if required	7a	
b	Check if: ☐ Schedule D not required ☐ Includes child's capital gain or (loss)		
8	Additional income from Schedule 1, line 10	8	
9	Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7a, and 8. This is your total income	9	
10	Adjustments to income from Schedule 1, line 26	10	
11a	Subtract line 10 from line 9. This is your adjusted gross income	11a	

For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see separate instructions. Cat. No. 11320B Form **1040** (2025) Created 9/5/25

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

Form 1040 (2025)		Page 2
Tax and Credits	11b Amount from line 11a (adjusted gross income)	11b
Standard deduction for— • Single or Married filing separately, \$15,750 • Married filing jointly or Qualifying surviving spouse, \$31,500 • Head of household, \$23,625 • If you checked a box on line 12a, 12b, 12c, or 12d, see inst.	12a Someone can claim ☐ You as a dependent ☐ Your spouse as a dependent b ☐ Spouse itemizes on a separate return c ☐ You were a dual-status alien d You: ☐ Were born before January 2, 1961 ☐ Are blind Spouse: ☐ Was born before January 2, 1961 ☐ Is blind e Standard deduction or itemized deductions (from Schedule A)	12e
	13a Qualified business income deduction from Form 8995 or Form 8995-A	13a
	b Additional deductions from Schedule 1-A, line 38	13b
	14 Add lines 12e, 13a, and 13b	14
	15 Subtract line 14 from line 11b. If zero or less, enter -0-. This is your taxable income	15
	16 Tax (see instructions). Check if any from Form(s): 1 ☐ 8814 2 ☐ 4972 3 ☐	16
	17 Amount from Schedule 2, line 3	17
	18 Add lines 16 and 17	18
	19 Child tax credit or credit for other dependents from Schedule 8812	19
	20 Amount from Schedule 3, line 8	20
	21 Add lines 19 and 20	21
	22 Subtract line 21 from line 18. If zero or less, enter -0-	22
	23 Other taxes, including self-employment tax, from Schedule 2, line 21	23
	24 Add lines 22 and 23. This is your total tax	24
Payments and Refundable Credits	25 Federal income tax withheld from: a Form(s) W-2 25a b Form(s) 1099 25b c Other forms (see instructions) 25c d Add lines 25a through 25c 25d	25d
	26 2025 estimated tax payments and amount applied from 2024 return If you made estimated tax payments with your former spouse in 2025, enter their SSN (see instructions):	26
If you have a qualifying child, you may need to attach Sch. EIC.	27a Earned income credit (EIC) 27a b Clergy filing Schedule SE (see instructions) ☐ c If you do not want to claim the EIC, check here ☐	
	28 Additional child tax credit (ACTC) from Schedule 8812. If you do not want to claim the ACTC, check here ☐ 28	28
	29 American opportunity credit from Form 8863, line 8 29	29
	30 Refundable adoption credit from Form 8839, line 13 30	30
	31 Amount from Schedule 3, line 15 31	31
	32 Add lines 27a, 28, 29, 30, and 31. These are your total other payments and refundable credits	32
	33 Add lines 25d, 26, and 32. These are your total payments	33
Refund	34 If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you overpaid	34
Direct deposit? See instructions.	35a Amount of line 34 you want refunded to you . If Form 8888 is attached, check here ☐ b Routing number c Type: ☐ Checking ☐ Savings d Account number	35a
	36 Amount of line 34 you want applied to your 2026 estimated tax 36	36
Amount You Owe	37 Subtract line 33 from line 24. This is the amount you owe . For details on how to pay, go to www.irs.gov/Payments or see instructions	37
	38 Estimated tax penalty (see instructions) 38	38
Third Party Designee	Do you want to allow another person to discuss this return with the IRS? See instructions. ☐ Yes . Complete below. ☐ No	
	Designee's name	Phone no. Personal identification number (PIN)
Sign Here	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
Joint return? See instructions. Keep a copy for your records.	Spouse's signature. If a joint return, both must sign.	Date Spouse's occupation
	Phone no.	Email address
Paid Preparer Use Only	Preparer's name Preparer's signature Date PTIN	Check if: ☐ Self-employed
	Firm's name	Phone no.
	Firm's address	Firm's EIN
Go to www.irs.gov/Form1040 for instructions and the latest information.		
Form 1040 (2025)		

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) Department of the Treasury Internal Revenue Service	Additional Income and Adjustments to Income Attach to Form 1040, 1040-SR, or 1040-NR. Go to www.irs.gov/Form1040 for instructions and the latest information.	OMB No. 1545-0074 2025 Attachment Sequence No. 01
Name(s) shown on Form 1040, 1040-SR, or 1040-NR		Your social security number
For 2025, enter the amount reported to you on Form(s) 1099-K that was included in error or for personal items sold at a loss		
Note: The remaining amounts reported to you on Form(s) 1099-K should be reported elsewhere on your return depending on the nature of the transaction. See www.irs.gov/1099k .		
Part I Additional Income		
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). Check if any from Form(s): ☐ 4797 ☐ 4684	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. If you repaid a 2025 overpayment (see instructions), check here ☐ and enter amount repaid:	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(l) excess business loss adjustment	8p
q	Taxable distributions from an ABLE 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
v	Digital assets received as ordinary income not reported elsewhere. See instructions	8v
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. This is your additional income . Enter here and on Form 1040, 1040-SR, or 1040-NR, line 8	10