

Dear Parents:

FACTS Grant & Aid Assessment will be conducting the financial need analysis for St. Mary School for the upcoming 2021-2022 school year. Families applying for financial aid will need to complete an application and submit the necessary supporting documentation to FACTS Grant & Aid Assessment by **March 15, 2021** for Round 1 and **June 1, 2021** for Round 2. Applicants can apply online at: [online.factsmgt.com/aid](https://online.factsmgt.com/aid) Once an online application has been completed, the following information will need to be sent to FACTS to complete the application process:

- Copies of your most recent Federal tax forms including all supporting tax schedules.
- Copies of your 2020 W-2 forms for both you and your spouse.
- Copies of supporting documentation for Social Security Income, Welfare, Child Support, Food Stamps, Workers' Compensation, and TANF.

All supporting documentation can be uploaded in pdf format online.

Documentation can also be faxed to 866-315-9264 or mailed to the address below. **Please be sure to include the applicant ID on all faxed or mailed correspondence.**

FACTS Grant & Aid Assessment  
P.O. Box 82524  
Lincoln, NE 68501-2524

If you have questions or concerns about the application process, you may speak with a FACTS Customer Care Representative at 866-441-4637.

Sincerely,

Mary Jane Taylor  
St. Mary Parish Business Manager  
(440) 323-5539 extension 222



## Grant & Aid Assessment

FACTS makes quality education affordable for families by assisting schools in awarding financial aid. We work with schools to create a custom application and collect financial data so schools can make accurate award decisions based on financial need.

To apply for financial aid, visit <https://online.factsmgt.com/aid>

After completing the online application, you will need to upload all required supporting documentation. If you are unable to upload, fax the required documents to 866.315.9264.

**The following supporting documents are required to complete the application process:**

- **IRS Federal Income Tax Return**, including all supporting schedules (the year of the tax return depends on the tax requirements of your school). If applicant and co-applicant file separately, we require both tax returns for the same tax year.
- Copies of **all the current year W-2 Wage and Tax Statements** for both the applicant and co-applicant.  
**NOTE:** If you are applying before you have received all the current year W-2 Wage and Tax Statements, please submit them as soon as they become available.
- Copies of all supporting tax documents if you have business income/loss from any of the following:
  - Business** - send Schedule C or C-EZ and Form 4562 Depreciation and Amortization
  - Farm** - send Schedule F and Form 4562 Depreciation and Amortization
  - Rental Property** - send Schedule E (page 1)
  - S-Corporation** - send Schedule E (page 2), Form 1120S (5 pages), Schedule K-1 and Form 8825
  - Partnership** - send Schedule E (page 2), Form 1065 (5 pages), Schedule K-1 and Form 8825
  - Estates and Trusts** - send Schedule E (page 2), Form 1041 and Schedule K-1

**IMPORTANT: If you file a tax return but do not have W-2 wages because you are self-employed, you will be required to submit a copy of your current year Federal Form 1040 Tax Return.**

- Copies of all supporting documentation for household Non-Taxable Income such as: Social Security Income, Welfare, Child Support, Food Stamps, Workers' Compensation, and Temporary Assistance for Needy Families (TANF). If you do not file a tax return, you are required to provide documentation of all income received.

**All documentation received is imaged upon receipt and then destroyed.**

You may log in to your FACTS user account to review the status of your application. Please allow 2 weeks processing time before inquiring further about receipt and/or status of the uploaded or faxed documents. Application deadlines are set by the institution awarding the aid. If you are applying after the deadline, contact your school to ensure that your application will be accepted.

**A non-refundable application fee may be required before your application will be submitted.**

**NOTE:** Award decisions are made by the institution providing the financial aid, not FACTS.