



Preparing Families for the Financial Aid Cycle

Presented by: Brett White





Brett White

Financial Specialist

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- 15+ years at FACTS
- Native Nebraskan and huge college football fan
- Lover of live music
- Three kids: 6-year-old, 4-year-old and newborn
- Lives in Duxbury, MA



On24 Housekeeping

Can't Hear?

F5 Refresh browser (Cmd+R on Mac)

 Adjust both your computer and media player volume

You may reposition, resize, or remove any tools on your screen. Use the tool bar to access any tools you have minimized.



Slides: The blue housekeeping details are on the slides now. This is where I will be sharing info today.








Media Player: You're watching my live video here.



Related Content: Download additional resources and HubHelp articles with step-by-step instructions from Related Content any time.



You will receive a **recording** of this webinar in your inbox within 24 hours!

-  IRS Integration Applicant Guide
-  Financial Aid Mgmt Applicant Guide
-  School Choice Playbook
-  IRS Introduction for Parents
-  Financial Aid Application Guide

Agenda

- What Families Need to Know
- Messaging Tips
- Engagement Timeline
- Tools and Resources for Families
- IRS Integration
- School Choice
- 8 Key Takeaways



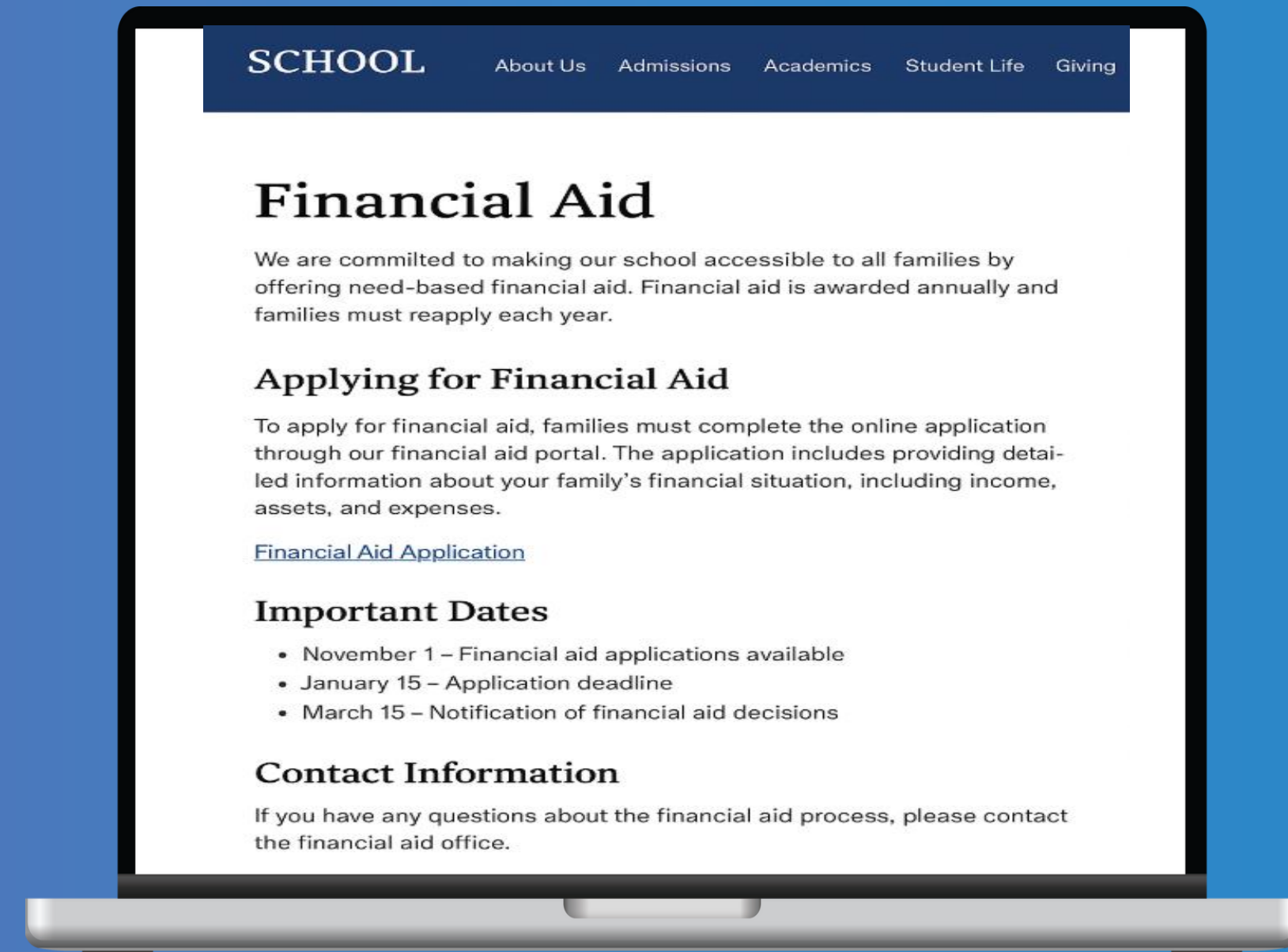
Early Prep: Key Actions for Schools

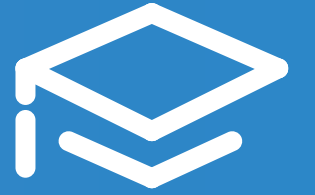
- **System & Set-up Review**
 - Confirm open/close dates
 - Review custom questions
 - Test user experience
 - **Document & Policy Check**
 - Internal aid policy
 - Required Documentation (W2s & 1040)
 - Finalize changes to award strategy or prioritization
 - Update communication materials
 - **Internal Planning & Coordination**
 - Schedule kickoff meeting – admissions, finance & communication teams
 - Assign staff to be available for office hours
 - Ensure team members have the right access to FACTS
 - **Family Engagement Strategy**
 - Set dates for financial aid nights or webinars
 - Create or update help resources
 - Identify families who struggled last year (late apps, appeals) for proactive outreach.
 - **Prior Year Reporting & Reflection**
 - % of incomplete apps
 - Submission timing patterns
 - Common reasons for delays
- 



What Families Need to Know Early

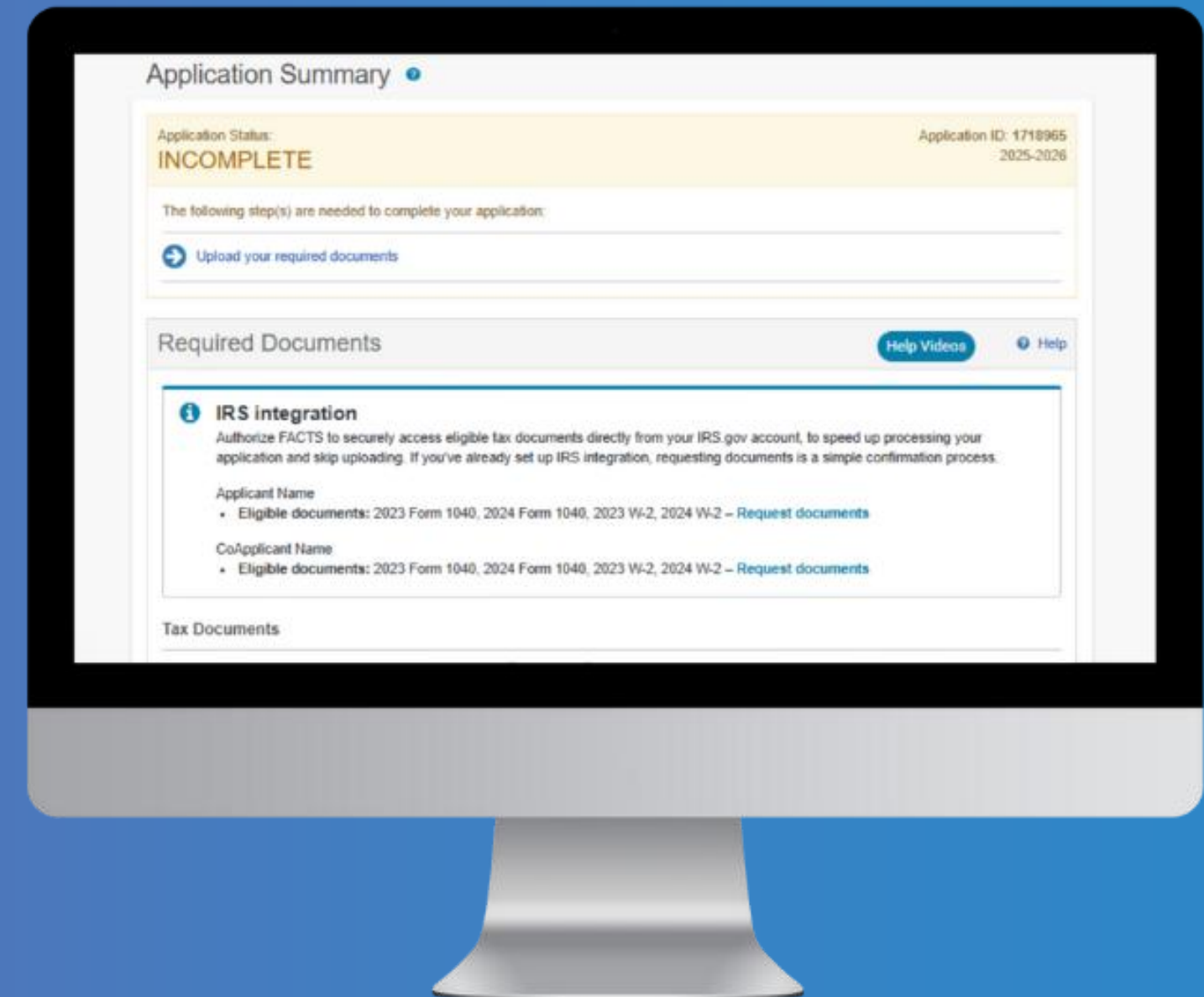
- What documents to gather (FACTS Family Guide)
- Defining the Household
 - Split families & financially responsible
- Deadlines and Awarding Timeline
 - Start early, submit early

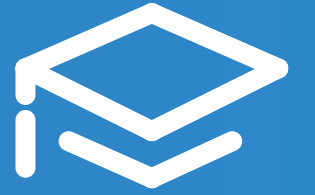




Tax Document Requirements

- IRS Integration – game changer
- Line up requirements with deadlines
 - 2024 vs 2025
 - W2s
- Other Documentation Requirements
 - Divorce Decrees
 - Applicant Documents





Messaging Tips That Work

- School Branded FAQ Document
- Dedicated Website Page
 - Application link
 - Awarding timeline & deadlines
 - Aid statistics – ave. awards, % receiving aid
- Normalize the Process
 - Rebrand Financial Aid
- Emphasis Partnership and Investment
- Reinforce the Benefit of Early Action
- Open Office House & Multi-lingual Support

EVERHOPE ACADEMY

AFFORDING AN EVERHOPE EDUCATION

2025-2026 TUITION: \$18,120

APPLY FOR TUITION ASSISTANCE

FACTS ABOUT TUITION ASSISTANCE AT EVERHOPE

- 1 OUT OF 3**
50 percent of high school students receive full tuition assistance:
- \$5-2 MILLION**
Everhope student families secure more than \$5.2 million in tuition assistance:
- 529 PLAN**
Use up to \$10,000 per year of your 529 Plan savings toward eligible
- PAY MONTHLY**
Students who test at the highest level are also eligible for Meet Scheleralup

2025-2026 TUITION: \$18,120

APPLY FOR TUITION ASSISTANCE

- 1 SUBMIT YOUR APPLICATION TODAY**
 - APPLY ONLINE:**
Students can apply online at: "insert student FACT's link here"
 - APPLICATION DEADLINES:**
Priority Deadline: 12/21/2024
Standard Deadline: 2/14/2025
- 2 UPLOAD SUPPORTING DOCUMENTS**
 - FORMS REQUIRED OF PARENT(S):**
Supporting documents required from parent(s) may include a recent 1040, a recent W 2, a 1098, and other verifying
- 3 RECEIVES YOUR DETERMINATION NOTICE**
 - AWARD DETERMINATIONS (ISSUED):**
Priority Applications – 8th Grade: 12/21/25
Standard Applications – 8th Grade: 2/28/25
All Other Applications: 3/12/25
- 4 ACCEPT YOUR TUITION ASSISTANCE AND**



Hosting Financial Aid Night

- Build trust, reduce confusion and normalize the FA process
- Hold Early: October–December
- Offer Virtual and/or in person (record virtual)
- Content to Cover: App walk-through, required docs, who applies, deadlines, aid eligibility myths, awarding timeline
- Takeaways: FACTS flyers, school branded FAQ, follow-up email, snacks!

FACTS
A @net COMPANY

Home
My Profile
Financial Accounts
Notifications

Application Form

- Schools**
- Applicant
- Students
- Student Questions
- Taxable Income
- Nontaxable Income
- Change of Income
- Monthly Expenses
- Annual Expenses
- Assets & Liabilities
- Review
- Submit

Schools

Please list all schools and organizations where you would like to apply for financial aid or will pay tuition in the 2024-2025 school year.

Central Millard School
Omaha, LA 68111

Organizations

Millard Scholarship Organization
Organization associated with Central Millard

[Add School / Organization](#)

[Save & Continue](#) [Save & Exit](#)

[Help](#)
[What to Expect](#) [FAQ](#)

Select the school(s) where your student will apply for aid or pay tuition for the upcoming year.

What's an Organization?
An organization is usually a scholarship fund, Diocese, or aid provider associated with your selected school. If it appears here, it will be checked by default to include your application.

Note:
You may have the option to unselect the group if you prefer not to share your application with them, though some organizations cannot be removed.

Need to add more?
Click [Add School / Organization](#) to search for additional schools or aid providers.

Tip:
For best results, search using **city or ZIP code**. Searching by school name can sometimes return multiple matches.

[Next](#)

FACTS Storylane Walkthrough



Family Engagement Timeline



September

October

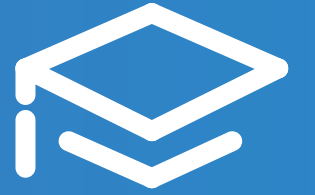
November

December

January

Early Awareness

- Email: "Financial Aid season is coming" + link to guide/checklist & FA resource Page
- Update website/parent portal with dates, who should apply, contact info
- Add note in school newsletter; flag multilingual support



September

October

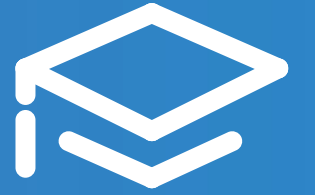
November

December

January

Application Opens

- Email all families: portal link, required docs, co-applicant rules, deadlines
- Host Financial Aid Info Session #1 (record and post)
- Promote help options: office hours, FAQs, support email/phone



September

October

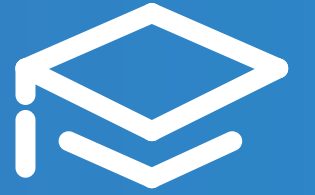
November

December

January

Early Completion Push

- Targeted reminders to “not started” families
 - Returning Applicant Report in FACTS Dashboard
- Outreach to incomplete apps: open office hours for questions
- Short text/app nudges a week before early deadlines



Priority Deadline Reminders

September

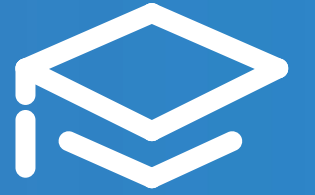
October

November

December

January

- Email: "Submit by 12/31 for Priority Review"
- Info Session # 2
- Personal outreach to returning/aid-dependent families



Standard Deadline Communications

September

October

November

December

January

- Email: "You still have time – apply by 1/31"
- Re-engage late starters; share doc tips (IRS import)
- Extended office hours the week before deadline
- Email when awards begin releasing




FACTS Resources

- Parent Facing Guide (PDF)
- Storylane Experience
- Application Video (Parent Dashboard)
- Tax Docs Videos (Parent Profile)
- Tax Docs Flyer (PDF)
- Parent Support Line & Online Chat

Application Document Help Videos ×

Click a title to view training videos about which documents you need for your application.

Tax Documents







Schedules C & F (Self-employed, Sub-Contractor, and Farm Income)

Schedule E (Rental real estate, Partnership, S-Corporation)

Upload Process

Required Documents → [Help Videos](#) ? Help

Tax Documents

2023 Federal Tax Return	 Form 1040 (Page 1)	 Form 1040 (Page 2)
2024 Federal Tax Return	 Form 1040 (Page 1)	 Form 1040 (Page 2)



Leveraging Tools in FACTS

Dashboard – Expected Applications

Application Insights

[View Applications](#)

■ verified **10** ■ incomplete **21** (0 in progress) ■ do not file **0**

31 Applications • 37 Students

APPLICATION MANAGEMENT

Expected: 11 | [View](#)

Unsubmitted: **3** | [View](#)

Incomplete: **21** | [View](#)

Hidden: **0** | None

Shared Tuition Linking | [View](#)

Prior Year Linking | [View](#)

Expected Applications

The following families submitted applications in 2024-2025 School Year and have not applied this year.

View [All](#) [Awarded](#) |

Scott Booth		
Julia Booth (4th) Prior Submit Date: 11/22/2023		Email: TestAccount1@factsmgt.com Office Phone: (985) 666-7777
Lolita Connelly and Roland Connelly		
Diego Connelly (11th), Olivia Connelly (6th) Prior Submit Date: 1/26/2024		Email: jsutton@factsmgt.com Mobile Phone: (817) 555-2231
Jennifer Copeland		
Olivia Copeland (5th) Prior Submit Date: 11/22/2023		Email: TestAccount1@factsmgt.com Mobile Phone: (781) 456-9510



Leveraging Tools in FACTS

Reports - Send Notifications

Applicant Status

31 applications selected

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App ID	Applicant Name	Has Comments	Regular App Status	Early App Status	Inc Data	Fee Payment	Business Review	Tax Return Year	W-2 Year	Submit Date	Last Receipt Date
1697220	Ackerman, Elle	No	VER	N/A				2024	DNR	04/15/2025	
1697225	Blue, Judy	No	VER	N/A				2024	DNR	04/25/2025	
1697195	Connelly, Lolita	No	N/A	VER				Waived	DNR	03/19/2025	
1697272	Duran, Carissa	No	VER	N/A				2024	DNR	06/03/2025	
1697264	Eaves, Damian	No	SBM	N/A	INC			DNR	DNR	06/03/2025	
1697273	Ferran, Colin	No	SBM	N/A	INC			DNR	DNR	06/03/2025	
1697263	Garzillo, Sunhwa	No	SBM	N/A				DNR	DNR	06/03/2025	

New Message

An email will be generated per application.

To: Mustone, Mary • Patton, Alta • Swan, Alice • Ackerman, Elle • Rush, August • Marshall, Emily • Blue, Judy • Rush, June

No messages will be sent to the following applicants due to invalid email addresses:
Connelly, Lolita • Hicks, Emma • Pobre Iii, Dennis • Jacobs, Mauricio • Garzillo, Sunhwa • Eaves, Damian • Landis, Richard • Rauchwerk, Sheryl • 15 more [View](#)

From: Premier Academy

B I U

Dear *|APP:FNAME|* *|APP:LNAME|* *|APP:SUFFIX|*

[View Application](#)

Sincerely,

|INST:NAME|

Smart Tags

- Applicant First Name
- Applicant Last Name
- Applicant Suffix
- Term
- Institution Name
- Submit Date

Select... [Save Template](#)

[Send](#) [Cancel](#) [Preview](#)

- Send emailed notice directly in FACTS (no reply)
- Use Smart Tags to input personal information
- Communicate with returning applicants
- Notifying families still missing tax documents



Leveraging Tools in FACTS

IRS Integration





Required Documents Help Videos Help

i **IRS integration**
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.

Lolita Connelly

- **Eligible documents:** 2024 Form 1040 – [Request documents](#)

Tax Documents

2024 Federal Tax Return	 Form 1040 (Page 1)	 Form 1040 (Page 2)
2025 Federal Tax Return	 Form 1040 (Page 1)	 Form 1040 (Page 2)

IRS Integration

How it works

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

1. Follow our step-by-step guide to submit a Transcript Information Authorization (TIA) request.
2. FACTS processes the request and sends an email with a link to approve and finalize it.
3. Once approved, FACTS receives the tax information directly from the IRS.

Recently filed taxes may take about 2 weeks to appear on IRS.gov.

i IRS authorization covers a range of tax periods - 3 years before and after the current tax year. Approving this range streamlines future tax document requests. Only documents for the selected year are retrieved.

Confirm Eligibility

I have an IRS.gov account
Verify or create an account at <https://www.irs.gov/your-account>

My address on file with the IRS is a U.S. address

[Back to Application Summary](#) Continue

- Pulls in 1040 Transcript & W2s
- Co-Applicant Experience
- Documents available within hours
- Immediately data entered
- Three-year authorization



School Choice

- Assess state-level availability and eligibility requirements
- Align internal tuition assistance with external programs (ESA, vouchers, tax-credit scholarships)
- Factor in state-funded amounts when determining aid eligibility
- Ensure total aid does not exceed tuition to prevent overfunding
- Confirm documentation meets both school and state compliance standards
- Provide families with clear guidance on funding options, timelines and expectations
- Coordinate messaging between admissions and business office
- Monitor funding trends and completion rates to support enrollment and budget planning

[Edchoice.org](https://edchoice.org)

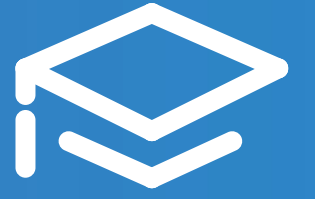
[Factsmgt.com/school-choice-playbook/](https://factsmgt.com/school-choice-playbook/)



8 Keys to Family Financial Aid Prep

1. Clear & Consistent Aid Policy
2. Proactive Family Communication Plan
3. Family-Friendly Application Experience
4. Multilingual & On-Site Support
5. School Choice & External Program Readiness
6. IRS Integration & Compliance
7. Staff Training & Internal Alignment
8. Data & Reporting Readiness





Thank You!

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