



## APPLY FOR TUITION ASSISTANCE 2021-2022 SCHOOL YEAR

### THE HALO INITIATIVE

The HALO Initiative supports Catholic Schools in the Diocese of Dallas in getting students to college & heaven by coordinating the distribution of need-based tuition assistance to students in diocesan schools. We believe that Catholic education changes lives & improves communities, and that a family's ability to pay should not limit their access to a better life through one of our Catholic Schools.

When you apply for tuition assistance through FACTS, you're applying for both tuition assistance from HALO and from your school.

### ELIGIBILITY

To be eligible to receive tuition assistance, a family/student must:

- Complete an application through FACTS Grant & Aid (must re-apply annually)
- Demonstrate financial need
- Meet the school's entrance requirements
- Be current with all financial obligations due to any Catholic school within the diocese

Tuition assistance is awarded without regard for race, religion, gender, or ethnic origin.

### TIMELINE

PRIORITY APPLICATION ROUND: November 1, 2020 – January 5, 2021

- Open to families currently enrolled in a diocesan Catholic school for the 2020-2021 school year
- Families will be notified by their school of award decisions in February 2021

REGULAR APPLICATION ROUND: January 6, 2021 – April 1, 2021

- Open to current families & families new to Catholic education
- Families will be notified by their school of award decisions in May 2021

### HOW TO APPLY

- 1) Use your school's unique FACTS link or visit [www.online.factsmgt.com](http://www.online.factsmgt.com) to create an account or log in
- 2) Complete your family application & pay the \$35 family application fee
- 3) Upload required supporting tax documents by photograph or scan
- 4) Ensure that FACTS is added to your email safe-sender list so you can receive updates about your application.

Your school can assist you in completing your application! Contact them to learn about making an appointment- click [here](#) for a complete listing of schools.

Filling out your application carefully ensures that it will be complete and on time.

## REQUIRED SUPPORTING DOCUMENTATION

To complete your FACTS application, you will be required to submit the following documents:

Copy of 2019\* or 2020 IRS Federal Form 1040, 1040A or 1040-EZ U.S. Individual Income Tax Return. If applicant and co-applicant file separately, we require both tax returns for the same tax year.

*\*some schools require the 2020 tax return for families applying for school financial aid*

Copies of all 2020\* W-2 Wage and Tax Statements for both the applicant and co-applicant. NOTE: If you are applying before you have received all the 2020 W-2 Wage and Tax Statements, please submit them as soon as they become available.

*\*Apply during the Priority Round (prior to January 5) to be eligible to use 2019 W-2 Wage & Tax Statements*

Copies of all supporting tax schedules if you have income from any of the following:

- BUSINESS – (Form 1040 Line 12) Attach Schedule C or C-EZ and Form 4562 Depreciation and Amortization
- FARM – (Form 1040 Line 18) Attach Schedule F and Form 4562 Depreciation and Amortization
- RENTAL PROPERTY – (Form 1040 Line 17) Attach Schedule E (page 1)
- S-CORPORATION – (Form 1040 Line 17) Attach Schedule E (page 2), Form 1120S (4 pages), Schedule K-1 and Form 8825
- PARTNERSHIP – (Form 1040 Line 17) Attach Schedule E (page 2), Form 1065 (5 pages), Schedule K-1 and Form 8825
- ESTATES AND TRUSTS – (Form 1040 Line 17) Attach Schedule E (page 2), Form 1041 and Schedule K-1

If you do not file income taxes and are unable to furnish a tax return or other tax schedules, you must provide copies of supporting documentation for Taxable Income, such as a letter from your employer.

Copies of all supporting documentation for household Non-Taxable Income including: Social Security Income, Welfare, Child Support, Food Stamps, Workers' Compensation, and Temporary Assistance for Needy Families (TANF).

**NOTE:** You *must* provide documentation to verify the source of any wages/income listed on your application. Applications that do not include this supporting information are incomplete and will not be considered for tuition assistance.

Please allow approximately 2 to 3 business days for FACTS to verify receipt of documents, and up to two weeks for your application & supporting documents to be fully processed.

If you have questions about the status of your application, please contact your school.