



## HOW TO APPLY 2019-2020 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.

### ELIGIBILITY

To be considered for 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 accepted & enrolled to grades K-12 in that school
- Be current with all financial obligations due to any Catholic school within the diocese

Financial aid is awarded without regard for race, religion, gender, or ethnic origin.

### TIMELINE

PRIORITY APPLICATION ROUND: November 1, 2018 – January 5, 2019

- Open to families currently enrolled in a Catholic school for the 2018-2019 school year
- Families will be notified by their school of award decisions in February 2019

REGULAR APPLICATION ROUND: January 6, 2019 – April 1, 2019

- Open to current families & families new to Catholic education
- Families will be notified by their school of award decisions in May 2019

### 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 application fee
- 3) Upload required supporting tax documents (see page 2)

Your school can assist you in completing your application! Contact them to learn about making an appointment.

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 2017\* or 2018 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 2018 tax return for families applying after January 1, 2019*

Copies of all 2018\* W-2 Wage and Tax Statements for both the applicant and co-applicant. NOTE: If you are applying before you have received all the 2018 W-2 Wage and Tax Statements, please submit them as soon as they become available.

*\*Priority Round (on/before January 5)- may use 2017 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 not "complete" 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 2 weeks for your application & supporting documents to be fully processed. If you have questions about your application status, please contact your school.