

## DIRECTIONS FOR APPLYING FOR FINANCIAL AID AT FACTS

1. You will choose "FACTS Grant and Aid."
2. You will put in the following information:
  - A. Personal information such as name, address, phone number, etc.
  - B. Social security number, date of birth, marital status, relationship to students, occupation, employer, employment status, and religious affiliation. (At I.C. school, financial aid is available no matter what your religious affiliation is -- the question is simply included to establish the correct tuition rate. Diocesan assistance is also available regardless of religious affiliation.) You will also need to state if you are an active parish member at one of the Celina cluster of parishes.
3. You will then get a page for Co-Applicant information. If you are not a two parent household, you can check the box at the top of the page to skip over this page. Otherwise, you will enter the applicable information for the co-applicant.
4. Then you will add student information for **each student attending a tuition-charging PK-12 Institution**. You will put student information in one student at a time, and click on "Add Student" to add more students.
5. Because FACTS is the company the Archdiocese had selected to use for the diocesan tuition assistance, your application will automatically be listed as both reported to Immaculate Conception School, Celina, Ohio and Cincinnati Archdiocese, Cincinnati, OH. If you do not see this when you have the form completed, please be sure to let Mrs. Muhlenkamp know.
6. Then you will fill in income information. You will list how you usually file taxes, etc., which will help to generate the correct series of questions. You will base your answers on your most recent tax forms. There will be a place you can say if you expect your income to change next year and explain accordingly. (If you file separately, you will list the applicant's information first and then the co-applicant's).
7. You will need to answer "Yes" or "No" to a series of questions such as "Do you own a farm?", "Do you own a business?", etc. If you answer yes, you will notice a box to the right, telling you what supporting information will be needed. You must answer each question.
8. The next page contains questions about non-taxable income, such as child support, social security, welfare, food stamps, etc. You will enter the amount and select the term (such as per week, month, etc.) If you have none, you need to enter 0 in that space.
9. The next page asks if you anticipate a change in income for the following year. If you click yes, a new series of question will generate, asking what you anticipate income to be for you and for co-applicant and have a list of reasons for you to check if they apply.

10. The next page will ask about monthly expenses -- rent or mortgage payments, home equity loan payments, vehicle expenses, other loan payments or credit card debt. You will also add any child support payments you make and health insurance premiums paid.

11. The next page will be annual expenses including: annual vehicle insurance, out of pocket medical costs, charitable contributions, college expenses, child/daycare expenses, and elderly care expenses. Fill in whatever applies.

12. The next page is assets and liabilities. You will need the value of you checking and savings accounts, investments, retirement plans, contributions to retirement plans, what your home is worth and what you owe on it if you own it.

13. There is a page for additional information where you may write anything that has not been already said that you think should be taken into account, such as the impending birth in a family or a recent death or illness that has impacted income, etc.

14. You will then be able to review the form and edit any necessary information. You may also choose to print this form for your files, if you like. (It might help you gather the correct information more easily next year or something.)

15. Finally, you will be asked to make a \$28.00 payment for the application fee. Again, your choices will be automatic withdrawal or credit card. Credit card payments will always have a 3% convenience fee added on. If neither of those ways will work for you, stop and call FACTS at the customer service number: 1-866-441-4637. Explain that you need to make a payment directly to the school via cash or check, and they will help us set that up.

**The first deadline to apply for diocesan tuition assistance will be January 31, 2017, so it is recommended that you do your financial aid application by that date, if possible. There will likely be a second distribution of grants in mid-to-late February. Those grants will be offered in February directly to families, and if you receive a grant from the diocese, you will need to bring that letter into school for it to be applied to tuition here. The same application will be used for us to divide up our parish-level assistance here at I.C. We will plan on informing families of those grants in May as usual.**