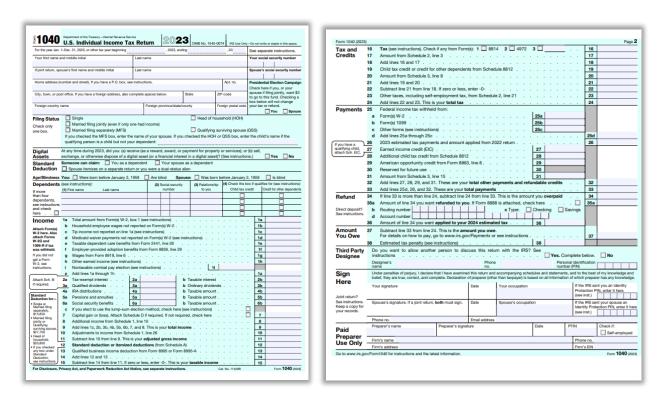# Education Scholarship Trust Fund Program

What documents Do I Need to Apply?

Depending on your responses to application questions some or all the following documents may be required.

Taxable Income
- Copy of U.S. Individual or Joint Income Tax Return for applicant and/or co-applicant. To obtain a copy of your tax return you can go to www.IRS.gov
- 2023 IRS Federal Form 1040 pages 1 and 2

Nontaxable Income (If Applicable)

*Documents must contain applicant or co-applicant name, amount received, and frequency of receipt. **Note:** You do not need to tell us about child support, veteran's payments, or Supplemental, Security Income.*

- **Alimony Received**- Court ordered legal documents or a letter from the provider of your alimony.
- **Social Security Income** - SSA-1099 or SSI statements/letters for all family members receiving benefits.
- **Workers' Compensation** - A Workers' Compensation award letter
- **Housing Allowance** - A benefit statement or enrollment and payment letter
- **Tax Exempt Interest** – A Form 1099-INT or Form 1099-OID

For assistance submitting documents for your application, please contact FACTS at 866-539-6359

- **Other Nontaxable Income** –All documentation available to substantiate income reported on the application. Child support, veterans' payments, and Supplemental Security Income (SSI) are not considered income and will not be accepted.

Other Documentation

Address Verification: Please provide one form of verification matching the physical address and **name of the applicant and/or co-applicant as listed on your application. Approved documents are:
- Driver's License or State Issued ID*
- Utility Bills* (Full Page) (gas, electric, water, etc.)
- Government-Issued Mail* (TANF, SNAP, voter registration card, tax assessment, etc.)
- Mortgage Statement for that residence*

Recent: If monthly, the recent statement should be within the last 3 months. If annual, the recent statement would be the current or previous year (if applicable).

**Additional documents such as a marriage license, divorce decree, or court documents showing a legal name change can be submitted along with an approved document to confirm the name's match.*

**Guardianship Verification: (*If Student is not on the 2023 tax return or no 2023 taxes were filed):* Please provide legal documents listing the name of the applicant and/or co-applicant as well as the student. Legal documents may include foster paperwork, adoption papers, divorce agreements, the 2023 or 2024 tax return or a birth certificate.

Medicaid Card (*If a current participant*): Please provide a copy of the Medicaid card in the student's name. Submitted Medicaid cards must match this example image to be accepted. Health Insurance cards are not accepted.
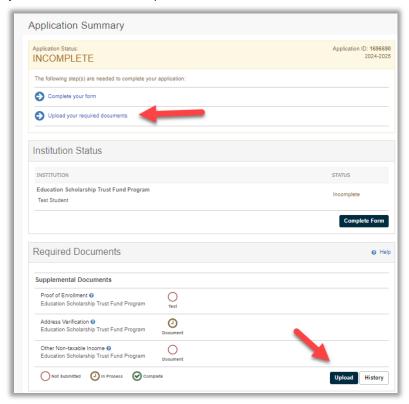

Active-Duty or Veteran Military Documentation: (If student has a legal guardian who is currently serving on active duty in the U.S. Armed Forces, or who is a veteran of the U.S. Armed Forces) Please provide one of the following documents confirming the student has a legal guardian who is active-duty or a veteran. The name must match the name of the applicant or co-applicant on this application. Approved documents are: Current Military ID, Leave and Earnings Statement (within 30 days), Orders for Active Duty, Letter from Commanding Officer on military letterhead or a Service Verification Letter.

Once all required information and documents have been submitted, please allow up to 30 days for processing.
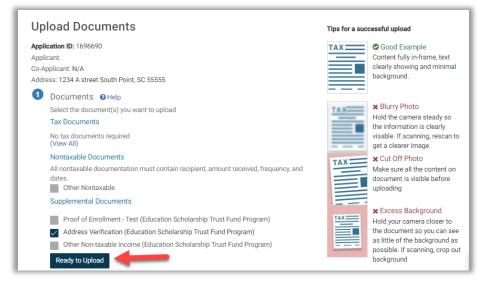
For assistance submitting documents for your application, please contact FACTS at 866-539-6359

How Do I Submit Documents?

Upon submitting your application, you will automatically be taken to your Application Summary page. There is a Required Documents section that will list out document requirements specific to your application. You will also receive an email listing required documentation. That email has a link to bring you directly back into your Application Summary.
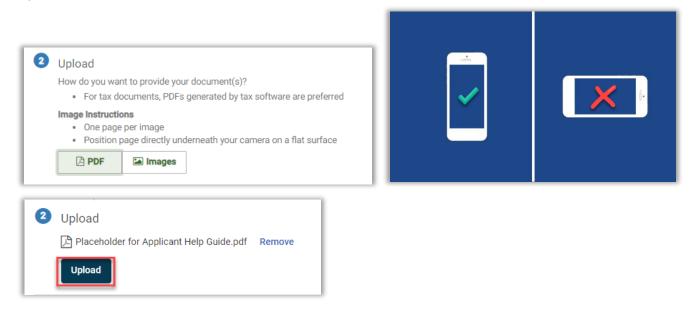
1) To upload documents, you can click on either the "**Upload your required documents**" link at the top of your summary or the "**Upload**" button in the Required Documents section.
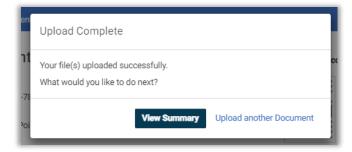

2) Once you have selected either option, the Upload Documents page appears listing out documents to upload. Select which document you are uploading in Step 1, then click "Ready to Upload". Pay careful attention to the tips on the right-hand side.

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3) In Step 2 you can choose to upload either PDF or Images-JPEG. If you are choosing to upload an image-JPEG this image must be vertical, as horizontal images are not accepted. Once the image has been selected click the "Upload" button.

4) You will then receive a message once your file has been uploaded successfully. If you have additional documents to upload you can click "Upload another Document" and this will allow you to continue uploading documents to your application. An email confirmation that an upload has been made will also be generated to the email address on file.

5) Please allow two weeks for document processing. Once documents have been processed you will receive a notification either:
   - Asking for additional documentation if there was an issue with the prior document(s). **OR**
   - That you are complete if all required documents have been received.

If you have any questions, please contact the application helpline at 866-539-6359.

Once all required information and documents have been submitted, please allow up to 30 days for processing.