



FAMILY APPLICATION CHECKLIST

Get Ready to Apply for an EdGen Scholarship



Use this checklist to gather household, student, school, grade, and income information before the EdGen application portal opens for the Federal Scholarship Tax Credit program.

TIP

Gather documents now, but do not assume eligibility until EdGen completes review under final Treasury/IRS guidance and participating-state rules.



The application will generally ask for three kinds of information

1

Household

Parent/guardian names, address, household members, filing status, and income verification details.

2

Student

Student names, dates of birth, current grade, applying grade, and priority status.

3

School

Current school, school attending next year, school state, tuition, and required fees.

Important state question: Treasury/IRS still may need to clarify certain cross-state scenarios, such as a parent living in one state while the child attends school in another. The application should collect both residence state and school state until final guidance is clear.



PART 1

Household and Student Information

These are the basic items families should be ready to enter. EdGen may request additional documentation depending on final rules and application design.

Household information

- Parent/guardian full legal names
- Email addresses and phone numbers
- Home address and state of residence
- Mailing address, if different
- Household members and relationship to student
- Tax filing status for the applicable tax year
- Prior calendar year household income information
- Taxpayer consent details for income verification, if required
- Documentation for unusual household circumstances, if requested
- Preferred language and best contact method

Student information

- Student full legal name
- Student date of birth
- Current school year: 2026-2027 grade, Nursery through 11th grade
- Applying school year: 2027-2028 grade, Kindergarten through 12th grade
- Current school, if applicable
- School attending next year, if known
- School state for 2027-2028
- Public school district or public school eligibility information
- Prior EdGen scholarship recipient status, if applicable
- Sibling scholarship priority information, if applicable

Tip: Use the same spelling for student and parent names across all documents. Small mismatches can slow down verification.



PART 2

School, Income, and Document Uploads

The goal is a smooth, one-time application experience. Families should be prepared to support the information they enter with appropriate documents if EdGen requests them.

1 School information

- School attending in 2027-2028
- School address and state
- Grade applying for
- Annual tuition amount, if known
- Required fees, if known
- School contact or admissions office
- Enrollment/acceptance confirmation, if requested

2 Income verification

- Prior-year tax return or transcript information
- W-2, 1099, or other income documents if requested
- IVES/Form 4506-C consent if used
- Household size confirmation
- Documentation for non-taxable income if requested
- Explanation of income changes, if requested

3 Application uploads

- Government-issued ID if requested
- Proof of address if requested
- Student birthdate documentation if requested
- Enrollment or acceptance document if requested
- Tuition/fee statement if requested
- Any special circumstance documentation

Security reminder

Do not email tax returns, Social Security numbers, or sensitive student records unless EdGen specifically provides a secure upload or verification process. Production systems should use secure collection, storage, and access controls.

Final application requirements may change after Treasury/IRS guidance and participating-state procedures are reviewed.

PART 3

Final Ready-to-Apply Checklist

Before starting the application, use this page as a quick family readiness check.

Ready-to-apply checklist

- I know which student or students I am applying for.
- I know each child's current 2026-2027 grade.
- I know each child's applying 2027-2028 grade.
- I know the school each child expects to attend next year, or I can select "undecided" or "school not listed."
- I know my household size and who is included in the household.
- I have my prior-year income information available.
- I understand EdGen may request income verification through a secure IRS transcript/IVES process, with required consent.
- I understand that applying does not guarantee a scholarship.
- I understand final eligibility may depend on federal rules, state participation, available funding, and EdGen policies.
- I know who to contact at my school if enrollment or tuition information is needed.

Best next step: Join EdGen updates so your family receives application timing, document checklist updates, and final eligibility guidance when available.



This checklist is informational only. It is not an application, eligibility decision, or award notice.