

TASFA (Texas Application for State Financial Aid) Check list

- Go to **SGASTDN** (Check Residency)
 - TASFA students are coded as **J** or **K** (**Print SGASTDN**)
 - If coded anything else, notify student we cannot award them until Admissions notes they are eligible for SB1528 status.

- Texas Application for State Financial Aid Application
 - Check to be sure **ALL** spaces are filled in
 - Application must be signed and dated (including parent if dependent)

- SB1528 Statement Form

- Determine Dependency Status:
 - Independent
 - Independent Verification, and (Check to be sure **ALL** spaces are filled in)
 - Student Tax Return Transcript, if filed, or W-2's, or a detailed statement of income earned and support provided to student/family

OR

- Dependent
 - Dependent Verification, and (Check to be sure **ALL** spaces are filled in)
 - Student Tax Return Transcript, if filed, **or** W-2's, **or** a detailed statement of income earned and support provided to student/family, and
 - Parent Tax Return Transcript, if filed, **or** W-2's, **or** a detailed statement of income earned and support provided to student/family

- If male 18-25, student must indicate on TASFA that they registered for Selective Service or were exempt

- Student must answer the drug conviction question (Question #25)

- HS Transcript

Office use only:

Aid Year: _____ Campus: _____ Date: _____ RRAAREQ Code: SB1528 Status Code: _____ Initials: _____

The Texas Application for State Financial Aid (TASFA) is a **free** application that collects information to help determine eligibility for state (or institutional) financial aid programs administered by institutions of higher education in the state of Texas.

Students classified as Texas residents who are not eligible to apply for federal financial aid using the Free Application for Federal Student Aid (FAFSA) are encouraged to complete the TASFA. To review the FAFSA filing requirements, visit studentaid.gov or contact the financial aid office at the institution you plan to attend for the 2023-24 award year. The federal application covers federal and state financial aid opportunities. If you meet the FAFSA filing requirements, then you should submit a completed FAFSA.

YOU DO NOT NEED TO COMPLETE BOTH THE FAFSA AND TASFA.

The 2023-24 state financial aid priority application deadline for many institutions of higher education is **January 15, 2023**. It is important to complete and submit this application with all required documentation to the financial aid office **on or before Jan. 15** to be considered for the most financial aid possible.

To complete this application, answer each item within each section. If a question does not apply to you, answer N/A for *not applicable*. For clarification on certain items, refer to the **TASFA Notes on pages 7-14**. If you have further questions about this form, contact the financial aid office at your institution.

Note: Personal information collected on the TASFA is protected under the Family Educational Rights and Privacy Act (FERPA) of 1974.

SECTION 1: STUDENT INFORMATION

DEMOGRAPHICS

1. Last Name		2. First Name		3. Middle Initial	
4. Date of Birth		5. What is your Social Security Number (SSN), Individual Taxpayer Identification Number (ITIN), Deferred Action for Childhood Arrivals (DACA) number? _____ Or check N/A []			
6. Your permanent mailing address number and street (include apt. number)					
7. City		8. State		9. ZIP Code	
10. Phone Number					
11. Your Email Address					

EDUCATION DETAILS

12. What will your high school (HS) completion status be when you begin college in the 2023-24 school year?		[] High School Diploma		[] Homeschooled (Skip to question 14)	
		[] High School Equivalency Certificate (i.e., GED, HiSET, etc.) (Skip to questions 13c & 13d)		[] None of these (Skip to question 14)	
13a. High School Name (If applicable)					
13b. High School City (If applicable)		13c. HS State (If applicable)		13d. HS ZIP code (If applicable)	
14. Will you have your first bachelor's degree before you begin the 2023-24 school year? [] Yes [] No					

SELECTIVE SERVICE STATEMENT OF REGISTRATION STATUS

An individual born male must complete the Selective Service Statement of Registration Status below, in accordance with [Texas Education Code, Title 3, Section 51.9095](#). For more information on Selective Service registration, visit sss.gov.

15. Were you born male or female? [] Male [] Female

16. Please mark one option below:

- I was born female and not required to register.
- I was born male and am under the age of 18, and not currently required to register.
- I was born male and am **REGISTERED** with the Selective Service.
- I was born male and am over age 18. I am not registered with the Selective Service, and I am not exempt.

I was born male and am **EXEMPT** from registration because:
(please briefly explain why you are exempt in the box below.)

STUDENT INCOME AND ASSETS

STUDENT MARITAL STATUS

<p>17. What is your current marital status as of today?</p> <input type="checkbox"/> Single <input type="checkbox"/> Separated <input type="checkbox"/> Married/remarried <input type="checkbox"/> Divorced or widowed	<p>18. Month and year you were married, remarried, separated, divorced, or widowed.</p> Month: _____ Year: _____ <input type="checkbox"/> N/A
<p>19. What is your spouse's Social Security Number (SSN), Individual Taxpayer Identification Number (ITIN), Deferred Action for Childhood Arrivals (DACA) number? _____ Or check N/A</p>	

STUDENT EARNINGS AND TAX INFORMATION

The financial aid office may require documentation, such as W-2s, tax returns, or tax transcripts. See Notes for questions 20-28.

<p>20. How much did you earn from working in 2021? _____ <input type="checkbox"/> N/A</p>	<p>21. How much did your spouse earn from working in 2021? _____ <input type="checkbox"/> N/A</p>
<p>22. For 2021, have you completed your IRS income tax return or another tax return? <input type="checkbox"/> Already completed <input type="checkbox"/> Will file <input type="checkbox"/> Not going to file (Skip to question 28)</p>	<p>23. What income tax return did you file or will file for 2021? <input type="checkbox"/> IRS 1040 <input type="checkbox"/> Foreign tax return, IRS 1040NR or IRS 1040NR-EZ <input type="checkbox"/> Tax return from Puerto Rico, a U.S. territory, or Freely Associated State</p>
<p>24. What is or will be your tax filing status for 2021? <input type="checkbox"/> Single <input type="checkbox"/> Head of Household <input type="checkbox"/> Married, filed joint return <input type="checkbox"/> Married, filed separate return <input type="checkbox"/> Qualifying Widow(er) <input type="checkbox"/> Don't know</p>	<p>25. Did (or will) you file a Schedule 1 with your 2021 tax return? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know</p>
<p>26. What was your (and spouse's) adjusted gross income for 2021? Adjusted gross income is on IRS Form 1040—line 11 _____</p>	<p>27. Enter your (and spouse's) income tax for 2021. Income tax amount is the total of IRS Form 1040—line 22 minus Schedule 2—line 2. If negative, enter zero. _____</p>
<p>28. As of today, are you (or spouse) a dislocated worker (currently unemployed)? This question is unrelated to previous tax years and is asking about right now. <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't know</p>	

DO NOT LEAVE ANY BLANKS.

If the answer is zero or the question does not apply to you, enter "0." Report whole dollar yearly amounts with no cents. Enter the combined amounts for you (and your spouse if applicable). See Notes for questions 29-33.

<p>29. As of today, what is your (and spouse's) total current balance of cash, savings, and checking accounts? <i>Don't include student financial aid.</i></p>	
<p>30. As of today, what is the net worth of your (and spouse's) investments, including real estate? <i>Don't include the home you live in.</i></p>	
<p>31. As of today, what is the net worth of your (and spouse's) current businesses and/or investment farms? <i>Don't include a family farm or family business with 100 or fewer full-time or full-time equivalent employees.</i></p>	

32. STUDENT 2021 ADDITIONAL FINANCIAL INFORMATION

<p>a. Education credits (American Opportunity Tax Credit and Lifetime Learning Tax Credit) from IRS Form 1040 Schedule 3—line 3.</p>	
<p>b. Child support paid because of divorce or separation or as a result of a legal requirement. Don't include support for children in your household.</p>	
<p>c. Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.</p>	
<p>d. Taxable college grant and scholarship aid reported to the IRS as income. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.</p>	
<p>e. Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income.</p>	
<p>f. Earnings from work under a cooperative education program offered by a college.</p>	

33. STUDENT 2021 UNTAXED INCOME

a.	Payments to tax-deferred pension and retirement savings plans (paid directly or withheld from earnings).	
b.	IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040 Schedule 1—total of lines 16 + 20.	
c.	Child support received for any of your children. Don't include foster care or adoption payments.	
d.	Tax exempt interest income from IRS Form 1040—line 2a.	
e.	Untaxed portions of IRA distributions and pensions from IRS Form 1040—(lines 4a + 5a) minus (lines 4b + 5b). Exclude rollovers. If negative, enter a zero here.	
f.	Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). Don't include the value of on-base military housing or the value of a basic military allowance for housing.	
g.	Veterans noneducation benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	
h.	Other untaxed income not reported, such as workers' compensation, disability benefits, untaxed foreign income, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040 Schedule 1—line 13.	
i.	Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form. This includes money that you received from a parent or other person whose financial information is not reported on this form and that is not part of a legal child support agreement.	

FEDERAL BENEFITS PROGRAMS & HOUSEHOLD INFORMATION

Federal Benefits Programs

This information being collected below will be only used to help determine eligibility for certain state financial aid options. Information disclosed about federal benefits received is protected from unauthorized distribution to third parties under the Family Educational Rights and Privacy Act (FERPA) of 1974.

At any time during 2022 or 2023, did you or anyone **in your household** (including your spouse or parents, if applicable) receive benefits from any of the federal programs listed? Mark all that apply with Yes, No or Prefer not to answer.

34. Medicaid, including the Children's Health Insurance Program (CHIP), or Supplemental Security Income (SSI) <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Prefer not to answer	35. Supplemental Nutrition Assistance Program (SNAP) benefits, also known as food stamps <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Prefer not to answer	36. Free and Reduced-Price School Lunch Program <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Prefer not to answer	37. Temporary Assistance for Needy Families (TANF) – may use a different name in different states <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Prefer not to answer	38. Special Supplemental Nutrition Program for Women, Infants, and Children (WIC) <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Prefer not to answer
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HOUSEHOLD

If you answer **"NO"** to any question in **SECTION 2** (41-53) *on the following page*, use these instructions to calculate your totals for questions 39 and 40.

- **Total number in household:** Include yourself (even if you don't live with your parents), your parents, and your parents' other children (even if they do not live with your parents) if your parents will provide more than half of their support between July 1, 2023 and June 30, 2024. Include any other people if they now live with your parents, and your parents provide and will continue to provide more than half of their support between July 1, 2023 and June 30, 2024.
- **Total number in college for 2023-24:** Always count yourself as a college student. **Do not include your parents.** Do not include siblings who are in U.S. military service academies. You may include others only if they will attend, at least half-time in 2023-24, a program that leads to a college degree or certificate.

If you answer **"YES"** to any question in **SECTION 2** (41-53) *on the following page*, use these instructions to calculate your totals for questions 39 and 40.

- **Total number in household:** Include yourself (and spouse) and your children if you will provide more than half of their support between July 1, 2023 and June 30, 2024 (even if they do not live with you). Include any other people if they now live with you, and you provide and will continue to provide more than half of their support between July 1, 2023 and June 30, 2024.
- **Total number in college for 2023-24:** Always count yourself as a college student. Do not include family members who are in U.S. military service academies. Include others only if they will attend, at least half-time in 2023-24, a program that leads to a college degree or certificate.

39. How many people are in your household? _____

40. How many people in your household will be college students between July 1, 2023 and June 30, 2024? _____

SECTION 2: STUDENT STATUS DETERMINATION

(See Notes for questions 41-53) Answer all questions.

41. Were you born before January 1, 2000?	[] Yes [] No
42. As of today, are you married?	[] Yes [] No
43. At the beginning of the 2023-2024 school year, will you be working on a master's or doctorate program (such as an MA, MBA, MD, JD, PhD, EdD, graduate certificate, etc.)?	[] Yes [] No
44. Are you currently serving on active duty in the U.S. Armed Forces for purposes other than training?	[] Yes [] No
45. Are you a veteran of the U.S. Armed Forces?	[] Yes [] No
46. Do you <i>now</i> have, or <i>will</i> you have children who will receive more than half of their support from you between July 1, 2023 and June 30, 2024?	[] Yes [] No
47. Do you have dependents (other than your children or spouse) who live with you and who receive more than half of their support from you, now and through June 30, 2024?	[] Yes [] No
48. At any time since you turned age 13, were both your parents deceased, were you in foster care or were you a dependent or ward of the court?	[] Yes [] No
49. As determined by a court in your state of residence, are you or were you an emancipated minor?	[] Yes [] No
50. Does someone other than your parent or stepparent have legal guardianship of you, as determined by a court in your state of legal residence?	[] Yes [] No
51. At any time on or after July 1, 2022, did your high school or school district homeless liaison determine that you were an unaccompanied youth who was homeless?	[] Yes [] No
52. At any time on or after July 1, 2022, did the director of an emergency shelter or transitional housing program funded by the U.S. Department of Housing and Urban Development determine that you were an unaccompanied youth who was homeless?	[] Yes [] No
53. At any time on or after July 1, 2022, did the director of a runaway or homeless youth basic center or transitional living program determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless?	[] Yes [] No

SECTION 3: PARENT INFORMATION



STOP: If you answered "YES" to any of the questions in **SECTION 2**, parental information is **NOT** required. Proceed to **SECTION 4**.

If you answered "NO" to **all the questions in SECTION 2**, you **must include** parental information, even if you do not live with your legal parents (biological, adoptive, or as determined by the state [for example, if the parent is listed on the birth certificate]). Grandparents, foster parents, legal guardians, widowed stepparents, aunts, uncles, and siblings are **not** considered parents on this form, unless they have legally adopted you. If your legal parents are married to each other, or are not married to each other and **live together**, answer the questions about both of them.

If you are in a single-parent home (e.g., parent(s) was never married, divorced, separated, etc.), **review the TASFA Notes for clarification**.

<p>54. As of today, what is the marital status of your legal parents?</p> <p>[] Married or Remarried [] Never Married [] Divorced or Separated [] Widowed [] Both parents live together unmarried</p>	<p>55. Month and year your parents were married, remarried, separated, divorced, or widowed:</p> <p>Month: _____ Year: _____ [] N/A (Never Married)</p>
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PARENT 1

56. Last Name		57. First Name	
58. Date of Birth		59. What is Parent 1's Social Security Number (SSN), Individual Taxpayer Identification Number (ITIN), Deferred Action for Childhood Arrivals (DACA) number _____ Or check N/A []	
60. Phone Number		61. Email Address	
62. Highest level of education completed: [] Middle School/Jr. High [] High School [] College or Beyond [] Other/Unknown			

PARENT 2 (IF APPLICABLE)

63. Last Name		64. First Name	
65. Date of Birth		66. What is your Parent 2's Social Security Number (SSN), Individual Taxpayer Identification Number (ITIN), Deferred Action for Childhood Arrivals (DACA) number? _____ Or check N/A []	
67. Phone Number		68. Email Address	
69. Highest level of education completed: [] Middle School/Jr. High [] High School [] College or Beyond [] Other/Unknown			

PARENT EARNINGS AND TAX INFORMATION

The financial aid office may require documentation, such as W-2s, tax returns, or tax transcripts. See Notes for questions 70-77.

70. How much did Parent 1 earn from working in 2021? _____	71. How much did Parent 2 earn from working in 2021? _____ (If applicable)
72. For 2021, have your parents completed an IRS income or another tax return? [] Already completed [] Will file [] Not going to file (skip to question 78)	73. What income tax return did your parents file or will file for 2021? [] IRS 1040 [] Foreign tax return, IRS 1040NR or IRS 1040NR-EZ [] Tax return from Puerto Rico, a U.S. territory, or Freely Associated State
74. What is or will be your parents' tax filing status for 2021? [] Single [] Head of household [] Married – filed joint return [] Married – filed separate return [] Qualifying widow(er) [] Don't know	75. Did (or will) your parents file a Schedule 1 with their 2021 tax return? [] Yes [] No [] Don't know
76. Enter your parents' 2021 adjusted gross income from IRS Form 1040—line 11. _____	77. Enter your parents' 2021 income tax from IRS Form 1040—line 22 minus Schedule 2—line 2. If negative, enter a zero. _____

DO NOT LEAVE ANY BLANKS.

If the answer is zero or the question does not apply to you, enter "0." Report whole dollar yearly amounts with no cents. Enter the combined amounts for your parents (if applicable). See Notes for questions 78-83.

78. As of today, what is your parents' total current balance of cash, savings, and checking accounts? <i>Don't include student financial aid.</i>	
79. As of today, what is the net worth of your parents' investments, including real estate? <i>Don't include the home in which your parents live.</i>	
80. As of today, what is the net worth of your parents' current businesses and/or investment farms? <i>Don't include a family farm or family business with 100 or fewer full-time or full-time equivalent employees.</i>	
81. As of today, is either parent a dislocated worker (currently unemployed)? This question is unrelated to previous tax years and is asking about right now. [] Yes [] No [] Don't know	

82. PARENT 2021 ADDITIONAL FINANCIAL INFORMATION (ENTER THE COMBINED AMOUNTS FOR YOUR PARENTS)

a. Education credits (American Opportunity Tax Credit and Lifetime Learning Tax Credit) from IRS Form 1040 Schedule 3—line 3.	
b. Child support paid because of divorce or separation or as a result of a legal requirement. <i>Don't include support for children in your parents' household.</i>	
c. Your parents' taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships	
d. Your parents' taxable college grant and scholarship aid reported to the IRS as income . Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.	
e. Combat pay or special combat pay. Only enter the amount that was taxable and included in your parents' adjusted gross income. <i>Don't include untaxed combat pay.</i>	
f. Earnings from work under a cooperative education program offered by a college.	

83. PARENT 2021 UNTAXED INCOME (ENTER THE COMBINED AMOUNTS FOR YOUR PARENTS)

a. Payments to tax-deferred pension and retirement savings plans (paid directly or withheld from earnings).	
b. IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040 Schedule 1—total of lines 16 + 20.	
c. Child support received for any of your children. Don't include foster care or adoption payments.	
d. Tax exempt interest income from IRS Form 1040—line 2a.	
e. Untaxed portions of IRA distributions and pensions from IRS Form 1040—(lines 4a + 5a) minus (lines 4b + 5b). Exclude rollovers. If negative, enter a zero here.	
f. Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). Don't include the value of on-base military housing or the value of a basic military allowance for housing.	
g. Veterans noneducation benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	
h. Other untaxed income not reported, such as workers' compensation, disability benefits, untaxed foreign income, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040 Schedule 1—line 13.	

SECTION 4: COLLEGE INFORMATION

If you plan to submit your TASFA to multiple institutions, **answer the questions below for each copy you submit.** Your housing status is based on your living situation at the college you plan to attend and may vary. Your college student ID, if you were provided one, is an optional item that will be used to match your application with your official student record if you enroll at a college.

What college do you plan to attend for 2023-24? (response optional) _____

Where do you plan to live when you attend college? (response required) On-campus Off-campus With parents or relative

What is your college student ID#, if you were provided one? (response optional) _____

SECTION 5: SIGNATURE

I certify that the information provided on this TASFA is true and correct to the best of my knowledge. If eligible, I will use any student financial aid provided as a result of my submission to pay only the cost of attending a Texas institution of higher education. I understand that any false statements may void my eligibility for state (or institutional) financial aid. By signing this application, I also acknowledge and consent to the following:

- I understand that the information provided on this application will be used only for evaluation of eligibility for state (or institutional) financial aid and that I may need to provide additional information or documentation to the college or university to determine eligibility.
- Once my application has been submitted, I must contact the college or university directly to discuss next steps to update or correct information on my submitted TASFA.

Student Signature _____

Date _____

Parent Signature _____

Date _____

*One parent signature is required if all questions in **SECTION 2** (question 41-53) were answered "NO."*

Mark which parent signed above. Parent 1 Parent 2

Submitting the TASFA: This completed application should be sent directly to the institution that you plan to attend for the 2023-24 school year. Contact the institution's financial aid office to confirm how to submit your TASFA form (**see notes page**).

The Texas Application for State Financial Aid (TASFA) is a **free** application that is accepted at public and private colleges in the State of Texas. These notes help explain certain questions on the TASFA, but you can also contact the financial aid office at the institution you currently attend or plan to attend for the **2023-24** award year if you need additional assistance completing this application.

SECTION ONE: STUDENT INFORMATION

Notes for questions 1 and 2 (page 1)

Enter your full, legal first and last name. Do not use nicknames or abbreviations since this information will be used to match your application with your official student record if you enroll at a college.

Notes for question 5 (page 1)

If you have been issued a Social Security card, enter your assigned number. If you have been approved for Deferred Action for Childhood Arrivals (DACA), enter your assigned Social Security Number (SSN) through this program. If you have an Individual Taxpayer Identification Number (ITIN), enter it. If you do not have any of these, mark "N/A."

Note that an SSN is not necessary to be eligible for state financial aid and will be used to match your application with your official student record if you enroll at a college. Personal information collected on the TASFA is protected under the Family Educational Rights and Privacy Act (FERPA) of 1974.

Notes for question 6 (page 1)

Enter your permanent mailing address street number and street name, or PO Box (be sure to include your apartment number, if applicable).

Notes for question 11 (page 1)

Enter your email address. Do not use an email account issued by your high school, college or work. The email account should be one you review often. You must provide your email address.

Notes for question 12 (page 1)

Select the answer that describes your high school completion status.

- High school diploma means you have received or will receive a high school diploma before the first date of your enrollment in college.
- High School Equivalency Certificate (i.e., GED, HiSET, etc.) means you have received or will receive an equivalency certificate before the first date of your enrollment in college.
- Homeschooled means you have completed homeschooling at the secondary level regulated by your state.
- "None of the Above" means you do not or will not have a high school diploma, GED, or equivalent before the first date of your enrollment in college and did not complete secondary school in a homeschool setting.

Notes for question 15 (page 1)

Enter your gender at birth. This will only be used for purposes of determining items related to Selective Service.

Notes for question 16 (page 1)

Individuals who were born male are required to complete a **Selective Service Statement of Registration Status** ([Texas Education Code \(TEC\), Title 3, Section 51.9095](#)). If you are male and between the ages of 18 through 25, you can register or review registration requirements by visiting [www.sss.gov](#) or completing a registration form found at a U.S. Post Office. If you are over the age of 25, you can no longer register.

Notes for question 17 (page 2)

Report your marital status as of the date you sign your TASFA. If your marital status changes after you sign your TASFA, check with the financial aid office at your institution.

Notes for question 19 (page 2)

If your spouse has been issued a Social Security card, enter the assigned number. If they have been approved for Deferred Action for Childhood Arrivals (DACA), enter their assigned Social Security Number (SSN) through this program. If they have an Individual Taxpayer Identification Number (ITIN), enter it. If they do not have any of these, mark "N/A."

Note that an SSN is not necessary to be eligible for state financial aid and will be used to match your application with your official student record if you enroll at a college. Personal information collected on the TASFA is protected under the Family Educational Rights and Privacy Act (FERPA) of 1974.

Notes for questions 20 and 21 (page 2)

Enter 2021 earnings (wages, salaries, tips, etc.), even if a tax return was not filed. This information may be on W-2 forms or on your tax return: IRS Form 1040—line 1 (or IRS Form 1040-NR—line 1a) + Schedule 1—lines 3 + 6 + Schedule K-1 (IRS Form 1065)—Box 14 (Code A).

If any individual earning item on these tax forms is negative, do not include that item in your calculation.

In order to accurately assess your financial situation, your institution needs to account for all sources of income. In cases where your family's earnings from employment are at or above the IRS filing threshold requirements, the financial aid office will require that you file taxes before processing your TASFA. Tax filing requirements can be found in IRS Publication 17, Table 1-1: 2021 Filing Requirements for Most Taxpayers. See <https://www.irs.gov/uac/About-Publication-17>.

Nontax filers: If you (and your spouse) did not file taxes, contact the financial aid office to see if additional information is needed.

Notes for question 22 (page 2)

If you indicate you "Will file" a 2021 tax return and your 2020 income is similar to your 2021 income, use your 2020 income tax return to provide estimates for questions about your income. If your application is selected for review, your college may require you to provide tax transcripts to verify the information you provided on the application.

Notes for question 23 (page 2)

If you filed or will file a foreign tax return or IRS 1040NR, or a tax return with Puerto Rico, another U.S. territory (e.g., Guam, American Samoa, the U.S. Virgin Islands, Swain's Island, or the Northern Marianas Islands), or one of the Freely Associated States, use the information from that return to fill out this form. If you filed a foreign return, convert all monetary units to U.S. dollars using the published exchange rate in effect for the date nearest to today's date. To view the daily exchange rates, go to federalreserve.gov/releases/h10/current.

Notes for question 24 (page 2)

If you filed or will file an IRS Form 1040 tax return, select your tax return filing status for 2021 from the “Filing Status” field:

- Single
- Head of household
- Married – filed joint return
- Married – filed separate return
- Qualifying widow(er)
- Don’t know

The “Filing Status” field is located at the top of page one on IRS Form 1040.

Notes for question 25 (page 2)

Answer “No” if you (and if married, your spouse) did not file a Schedule 1.

Answer “No” if you (and if married, your spouse) did or will file a Schedule 1 to report only one or more of the following items:

- Unemployment compensation (line 7)
- Other income to report (line 8 - may not be a negative value)
- Educator expenses (line 11)
- IRA deduction (line 20)
- Student loan interest deduction (line 21)
- Receiving, selling, sending, exchanging, or otherwise acquiring any financial interest in any virtual currency

Answer “Yes” if you (or if married, your spouse) filed or will file a Schedule 1 and reported additional income or adjustments to income on any lines other than or in addition to the six exceptions listed above.

If you do not know if you filed or will file a Schedule 1, select “Don’t know”.

Notes for question 26 (page 2)

If you filed a 2021 tax return (or if married, you and your spouse filed a joint tax return), the AGI can be found on IRS Form 1040—Line 11.

If you and your spouse filed separate tax returns, calculate your total AGI by adding line 11 from both 2021 tax returns and entering the total amount.

If you or your spouse will file a federal tax return but haven’t yet filed, estimate the amount that will appear in line 11 of your IRS Form 1040.

If one of you filed a tax return and the other didn’t and won’t file, add line 11 from your 2021 IRS Form 1040 to your spouse’s 2021 income earned from working (for example, earnings from the W-2 form[s] and/or any other earning statements).

Notes for question 27 (page 2)

This question cannot be left blank if you (and your spouse) filed or will file a 2021 income tax return.

Income tax paid can be found on your 2021 IRS Form 1040 on line 22 minus Schedule 2—line 2. If negative, enter zero.

Note: The line numbers above are from the Internal Revenue Service tax form, not from the W-2 form.

Notes for question 28 (page 2)

This question is asking about your current situation and is unrelated to previous tax years. The financial aid administrator at your college may require you to provide proof that you (or your spouse) are a dislocated worker. In general, a person may be considered a dislocated worker if the person:

- is receiving unemployment benefits due to being laid off or losing a job and is unlikely to return to a previous occupation; or
- has been laid off or received a lay-off notice from a job; or
- was self-employed but is now unemployed due to economic

conditions or natural disaster; or

- is the spouse of an active duty member of the Armed Forces and has experienced a loss of employment because of relocating due to permanent change in duty station; or
- is the spouse of an active duty member of the Armed Forces and is unemployed or underemployed, and is experiencing difficulty in obtaining or upgrading employment; or
- is a displaced homemaker. A displaced homemaker is generally a person who previously provided unpaid services to the family (e.g., a stay-at-home parent), is no longer supported by the spouse, is unemployed or underemployed, and is having trouble finding or upgrading employment.

Note: If a person quits work, generally they are not considered a dislocated worker even if, for example, the person is receiving unemployment benefits. This situation excludes a spouse of an active duty member of the Armed Forces.

Notes for question 29 (page 2)

Add the account balances of your (and your spouse’s) cash, savings, and checking accounts as of today. Enter the total of all accounts as the total current balance. If the total is negative, enter zero as the total current balance.

Do not add student financial aid into your account balances. Round to the nearest dollar and do not include commas or decimal points.

Notes for question 30 (page 2)

Net worth means the current value, as of today, of investments, businesses, and/or investment farms, minus debts related to those same investments, businesses, and/or investment farms. When calculating net worth, use 0 for investments or properties with a negative value.

Investments include real estate (do not include the home in which you live), rental property (includes a unit within a family home that has its own entrance, kitchen, and bath rented to someone other than a family member), trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, installment and land sale contracts (including mortgages held), commodities, etc.

Investments also include qualified educational benefits or education savings accounts (e.g., Coverdell savings accounts, 529 college savings plans, and the refund value of 529 prepaid tuition plans). For a student who does not report parental information, the accounts owned by the student (and/or the student’s spouse) are reported as student investments. For a student who must report parental information, the accounts are reported as parental investments, including all accounts owned by the student and all accounts owned by the parents for any member of the household.

Investments do not include the home you live in, the value of life insurance, ABLE accounts, retirement plans (401[k] plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.) or cash, savings, and checking accounts already reported in questions 29 and 78.

Investments also do not include UGMA and UTMA accounts for which you are the custodian but not the owner.

Investment value means the current balance or market value of these investments as of today. Investment debt means only those debts that are related to the investments.

Notes for question 31 (page 2)

Enter the net worth (current value minus debt) of the current businesses and/or investment farms that you (and your spouse) own as of today.

Business and/or investment farm value includes the market value of land, buildings, machinery, equipment, inventory, etc. Business and/or investment farm debt means only those debts for which the business or investment farm was used as collateral.

Business value does not include the value of a small business if your family owns and controls more than 50% of the business and the business has 100 or fewer full-time or full-time equivalent employees. For small business value, your family includes: (1) persons directly related to you, such as a parent, sister, or cousin; or (2) persons who are or were related to you by marriage, such as a spouse, stepparent, or sister-in-law.

Investment farm value does not include the value of a family farm that you (your spouse) live on and operate.

Notes for question 32a (page 2)

You will only have this information if you (or your spouse) submitted a 2021 federal tax return.

- If you and your spouse filed separate tax returns, add IRS Form 1040 Schedule 3—line 3 from both tax returns and enter the total amount.
- If you or your spouse will file a federal tax return but haven't yet filed, estimate the amount that will appear in the lines noted above.

Note: The line number (IRS Form 1040 Schedule 3—line 3) is from the IRS tax form, not from the W-2 form.

Notes for question 32b (page 2)

Enter the total amount of child support you (and your spouse) paid because of divorce or separation or as a result of a legal requirement in 2021. Do not include support for children in your household. Report the total annual amount you (and your spouse) paid in 2021. Round to the nearest dollar and do not include commas or decimal points.

Notes for question 32c (page 2)

Enter the total amount of taxable earnings that you (and your spouse) received in 2021 from work-study or other need-based work programs, such as fellowships and assistantships. Work-study is reported on your W-2 form as income earned from work and should be reported here whether or not you are a tax filer.

Note: The amounts reported in the Student's Additional Financial Information fields (a-f) are treated differently in the EFC calculation, and you will not be penalized.

Notes for question 32d (page 2)

Enter the total amount of grant and scholarship aid reported to the IRS as part of your (and your spouse's) adjusted gross income (AGI) for 2021.

This is student aid that was part of the student's (and your spouse's) financial aid package but was also considered taxable and included in the student's (and your spouse's) AGI. In most cases, grant and scholarship aid is not reported on the tax return as part of your AGI unless the amount you received exceeds your educational expenses (tuition, fees, books, supplies, or equipment). See IRS Publication 970.

Student aid types to report may include:

- Grants
- Scholarships
- Waivers/Remissions
- Fellowships/Assistantships (grant or scholarship portions)

- AmeriCorps education awards
- AmeriCorps living allowances (but not insurance or child care payments)
- AmeriCorps interest accrual payments (for student loan interest that accrued while you were in AmeriCorps)

Notes for question 32e (page 2)

Enter the total amount of taxable combat pay or special combat pay that you (and your spouse) received in 2021. Only enter the amount that was taxable and included in the adjusted gross income.

Note: Do not enter untaxed combat pay reported on the W-2 Box 12, Code Q.

Notes for question 32f (page 2)

Enter the amount of received income earned from work under a cooperative education program offered by a college that you (and your spouse) received in 2021. Round to the nearest dollar and do not include commas or decimal points.

- If you received the same dollar amount every month, multiply the amount by the number of months you received it. The result is the total annual amount.
- If you did not receive the same amount each month, add together the amounts you received each month. The result is the total annual amount.

Notes for question 33a (page 3)

Enter the total amount you paid to your tax-deferred pension and savings plans (paid directly or withheld from your earnings) in 2021. These amounts are reported on the W-2 form in boxes 12a through 12d, codes D, E, F, G, H, and S. Don't include amounts reported in code DD (employer contributions toward employee health benefits).

Notes for question 33b (page 3)

Enter the amount of IRA deductions and payments to self-employed SEP, SIMPLE, Keogh, and other qualified plans that you (and your spouse) received in 2021. Round to the nearest dollar and do not include commas or decimal points.

Note: The line number references above are from the IRS tax form, not from the W-2 form.

Notes for question 33c (page 3)

Enter the total amount of child support you (and your spouse) received in 2021 for all children in your household.

- If you received the same dollar amount every month, multiply the amount by the number of months you received it. The result is the total annual amount.
- If you did not receive the same amount each month, add together the amounts you received each month. The result is the total annual amount.

Note: Do not include foster care or adoption payments.

Notes for question 33d (page 3)

Enter the total amount of tax-exempt interest income you (and your spouse) received in 2021. If you (and your spouse) filed IRS Form 1040, use line 2a.

Note: The line number references above are from the IRS tax form, not from the W-2 form.

Notes for Question 33e (page 3)

Enter the total amount of the untaxed portions of IRA distributions you (and your spouse) received in 2021. If the total is a negative amount, enter a zero (0).

If you (and your spouse) filed IRS Form 1040, use (lines 4a + 5a) minus (lines 4b + 5b).

Notes for question 33f (page 3)

Enter the total cash value of housing, food, and any other living allowances you (and your spouse) received in 2021. These allowances are often paid to military, clergy, and others.

Do not include rent subsidies for low-income housing, the value of on-base military housing, or the value of a basic military allowance for housing.

Notes for question 33g (page 3)

Veterans non-education benefits include Disability, Death Pension, Dependency and Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances.

Do not include veterans' educational benefits, such as the Montgomery GI Bill, Dependents Education Assistance Program, VA Vocational Rehabilitation Program, VEAP Benefits, and Post-9/11 GI Bill.

- If you received the same dollar amount every month, multiply the amount by the number of months you received it. The result is the total annual amount.
- If you did not receive the same amount each month, add together the amounts you received each month. The result is the total annual amount.

Notes for question 33h (page 3)

Enter the total amount of any other untaxed income or benefits you received for 2021, such as workers compensation, Black Lung Benefits, untaxed portions of Railroad Retirement Benefits, disability, etc. that you (and your spouse) received. Also include untaxed portions of health savings accounts from IRS Form 1040 Schedule 1—line 13.

Do not include extended foster care benefits, student aid, earned income credit, child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Innovation and Opportunity Act educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements, (e.g., cafeteria plans), foreign income exclusion, or credit for federal tax on special fuels.

Notes for question 33i (page 3)

Enter the total amount of cash support you (and your spouse) received in 2021 from a friend or relative (other than your parents, if you are a dependent student). Report the amount if it is not reported elsewhere on this application.

If someone is paying rent, utility bills, etc., for you while you attend school, include the amount of that person's contributions, unless the person is your parent whose information is reported on this application.

Include money that you received from a parent or other person whose financial information isn't reported on this form and that isn't part of a legal child support agreement.

Note: This includes distributions to you (the student beneficiary) from a 529 plan that is owned by someone other than you or your parents (such as, your grandparents, aunts, uncles, and noncustodial parents).

Notes for questions 34-38 (page 3)

The information being collected below will only be used to help determine eligibility for certain state financial aid options.

Information disclosed about federal benefits received is protected from unauthorized distribution to third parties under the Family Educational Rights and Privacy Act (FERPA) of 1974.

SECTION TWO: STUDENT STATUS DETERMINATION

Notes questions 41-53 (page 4)

Student Status questions help determine if you will need to give parental information on your TASFA. If you answer **yes** to **any** of the student status questions, you will **not** need to give parental information. If you answer **no** to **all** of the following student status questions, then **you will need** parental information and for your parent to sign your application.

Notes for question 41 (page 4)

If you were born on January 1, 2000, you should enter “No.”

Notes for question 42 (page 4)

Report your marital status as of the date you sign your TASFA (enter married if you are separated but not divorced). If your marital status changes after you sign your TASFA, check with the financial aid office at the institution you plan to attend.

Notes for question 44 (page 4)

Answer “Yes” if you are currently serving in the U.S. Armed Forces or are a National Guard or Reserves enlistee who is on active duty for other than state or training purposes.

Answer “No” if you are a National Guard or Reserves enlistee who is on active duty for state or training purposes.

Notes for question 45 (page 4)

Answer “No” (you are not a veteran) if you:

- have never engaged in active duty (including basic training) in the U.S. armed forces,
- are currently a Reserve Officers' Training Corps (ROTC) student or a cadet or midshipman at a service academy,
- are a National Guard or Reserves enlistee activated only for state or training purposes, or
- were engaged in active duty in the U.S. armed forces but released under dishonorable conditions.

Also answer “No” if you are currently serving in the U.S. armed forces and will continue to serve through June 30, 2024.

Answer “Yes” (you are a veteran) if you:

- have engaged in active duty (including basic training) in the U.S. armed forces or are a National Guard or Reserves enlistee who was called to active duty for other than state or training purposes, or were a cadet or midshipman at one of the service academies; and
- were released under a condition other than dishonorable. Also answer “Yes” if you are not a veteran now but will be one by June 30, 2024.

Notes for question 48 (page 4)

Answer “Yes” if at any time since you turned age 13:

- you had no living parent, even if you are now adopted; or
- you were in foster care, even if you are no longer in foster care today; or
- you were a dependent or ward of the court, even if you are no longer a dependent or ward of the court today. (Someone who is incarcerated is not considered a ward of the court.)

Note: If you are not sure if you were in foster care, check with your state child welfare agency. You can find that agency's contact information at childwelfare.gov/nfcad.

The financial aid administrator at your school may require you to provide proof that you were in foster care or a dependent or ward of the court.

Notes for questions 49 & 50 (page 4)

The definition of legal guardianship does not include your parents, even if they were appointed by a court to be your guardians. You are also not considered a legal guardian of yourself. An emancipated minor is someone who has been legally deemed an adult by a court in his or her state of residence.

Answer “Yes” if you can provide a copy of the court’s decision that, as of today, you are an emancipated minor or are in legal guardianship.

Also, answer “Yes” if you can provide a copy of a court’s decision that you were an emancipated minor or were in legal guardianship immediately before you reached the age of being an adult in your state. The court must be located in your state of legal residence at the time the court’s decision was made.

Answer “No” if you are still a minor and the court decision is no longer in effect or the court decision was not in effect at the time you became an adult.

Note: The financial aid administrator at your school may require you to provide additional information such as a copy of the court’s decision.

Notes for questions 51-53 (page 4)

Answer “Yes” if you received a determination at any time on or after July 1, 2022, that you were an unaccompanied youth who was homeless or at risk of being homeless.

- “Homeless” means lacking fixed, regular, and adequate housing. You may be homeless if you are living in shelters, parks, motels, hotels, public spaces, camping grounds, cars, abandoned buildings, or temporarily living with other people because you have nowhere else to go. Also, if you are living in any of these situations and fleeing an abusive parent, you may be considered homeless even if your parent would otherwise provide a place to live.
- “Unaccompanied” means you are not living in the physical custody of your parent or guardian.

Answer “No” if you are not homeless or at risk of being homeless, or do not have a determination. However, even if you answer “No,” you should contact the financial aid administrator at the college you plan to attend if you are either (1) homeless and unaccompanied or (2) at risk of being homeless, unaccompanied, and providing for your own living expenses, as your college financial aid office can determine that you are “homeless” and are not required to provide parental information.

The financial aid administrator at your college may require you to provide a copy of the determination if you answered “Yes” to any of these questions.

SECTION THREE: PARENT INFORMATION

Notes for questions 54-83 (pages 4-6)

If you answer no to all of the student status questions in Section 2, then **you will need** parental information and for your parent to sign your application.

Note: If you believe you have a special circumstance in which you are unable to enter parental information when completing the TASFA, it is important for you to notify and work closely with the financial aid office of the institution you plan to attend. In limited circumstances such as the ones listed below, you may be able to submit your TASFA without providing parental information:

- your parents are incarcerated.
- you have left home due to an abusive family environment.
- you do not know where your parents are and are unable to contact them (and you have not been adopted).

In these special circumstances, it is important for you to understand

the following: The financial aid staff may ask for additional information to determine whether you can have an expected family contribution (EFC) calculated without parental data. Gather as much written evidence of your situation as you can. Written evidence may include court or law enforcement documents; letters from a clergy member, school counselor, or social worker; and any other relevant documentation that explains your special circumstance.

Notes for question 54 (page 4)

Report your legal parents’ marital status as of the date you sign your TASFA (enter married if they are separated but not divorced).

- If your parent was never married and does not live with your other legal parent, or if your parent is widowed and not remarried, answer the questions about that parent.
- If your legal parents (biological, adoptive, or as determined by the state [for example, if the parent is listed on the birth certificate]) are not married to each other and live together, select “Unmarried and both legal parents living together” and provide information about both of them, regardless of their gender. Do not include any person who is not married to your parent and who is not a legal or biological parent.
- If your legal parents are married, select “Married or remarried.” If your legal parents are divorced but living together, select “Unmarried and both legal parents living together.” If your legal parents are separated but living together, select “Married or remarried,” not “Divorced or separated.”
- If your parents are divorced or separated, answer the questions about the parent you lived with more during the past 12 months. (If you did not live with one parent more than the other, give answers about the parent who provided more financial support during the past 12 months or during the most recent year that you actually received support from a parent.) If this parent is remarried as of today, answer the questions about that parent and your stepparent.
- If your widowed parent is remarried as of today, answer the questions about that parent and your stepparent.

Notes for questions 59 and 66 (page 4-5)

If your parent has been issued a social security card, enter their assigned number. If your parent has been approved for Deferred Action for Childhood Arrivals (DACA), enter your assigned social security number (SSN) through this program. If your parent has an Individual Taxpayer Identification Number (ITIN), enter it. If your parent does not have an assigned SSN or other number, mark “N/A.”

Note that a parent SSN is not necessary for you to be eligible for state financial aid. Personal information collected on the TASFA is protected under the Family Educational Rights and Privacy Act (FERPA) of 1974.

Notes for question 61 (page 4)

The email provided for your parent is very important that it be a regularly reviewed email account. Please make sure that the email is accurate.

Notes for questions 62 and 69 (page 4-5)

Select the answer that best describes the highest level of education completed by your parent. Some financial aid is offered based on the level of schooling your parents completed.

Notes for questions 70 and 71 (page 5)

Enter Parent 1 and Parent 2 (if applicable) 2021 earnings (wages, salaries, tips, etc.), even if a tax return was not filed. This information may be on W-2 forms or on Parent 1’s tax return: IRS Form 1040—line 1 (or IRS Form 1040-NR—line 1a) + Schedule 1—lines 3 + 6 + Schedule K-1 (IRS Form 1065)—Box 14 (Code A).

If any individual earning item on these tax forms is negative, do not include that item in your calculation.

Notes for question 72 (page 5)

If your parents are now married or living together, answer this question about them as a couple. If they are not married and not living together, answer this question about the parent who is reporting financial information on this application.

If you indicate Parent "Will file" a 2021 tax return and your 2021 income is similar to your 2020 income, use your 2020 income tax return to provide estimates for questions about your income.

If your application is selected for review, your college may require you to provide tax transcripts to verify the information you provided on the application.

Notes for question 73 (page 5)

If your parent filed or will file a foreign tax return or IRS 1040NR, or a tax return with Puerto Rico, another U.S. territory (e.g., Guam, American Samoa, the U.S. Virgin Islands, Swain's Island, or the Northern Marianas Islands), or one of the Freely Associated States, use the information from that return to fill out this form. If your parent filed a foreign return, convert all monetary units to U.S. dollars, using the published exchange rate in effect for the date nearest to today's date. To view the daily exchange rates, go to [federalreserve.gov/releases/h10/current](https://www.federalreserve.gov/releases/h10/current).

Notes for question 74 (page 5)

If a parent filed or will file an IRS Form 1040 tax return, you must select the tax return filing status for 2021 from the "Filing Status" field:

- Single
- Head of household
- Married – filed joint return
- Married – filed separate return
- Qualifying widow(er)
- Don't know

The "Filing Status" field is located at the top of page one on IRS Form 1040.

Notes for question 75 (page 5)

Answer "No" if your parents did not file a Schedule 1.

Answer "No" if your parents did or will file a Schedule 1 to report only one or more of the following items:

- Unemployment compensation (line 7)
- Other income to report (line 8 - may not be a negative value)
- Educator expenses (line 11)
- IRA deduction (line 20)
- Student loan interest deduction (line 21)

Receiving, selling, sending, exchanging, or otherwise acquiring any financial interest in any virtual currency

Answer "Yes" if your parents filed or will file a Schedule 1 and reported additional income or adjustments to income on any lines other than or in addition to the six exceptions listed above.

If you do not know if your parents filed or will file a Schedule 1, select "Don't know".

Notes for question 76 (page 5)

If your parents filed a 2021 tax return, the AGI can be found on IRS Form 1040—Line 11.

If your parents filed separate tax returns, calculate the total AGI by adding line 11 from both 2021 tax returns and entering the total amount.

If your parents will file a federal tax return, but haven't yet filed, estimate the amount that will appear in line 11 of your IRS Form 1040.

If one parent filed a tax return and the other didn't and won't file, add line 11 from the 2021 IRS Form 1040 to your other parent's 2021 income earned from working (for example, earnings from the W-2 form[s] and/or any other earning statements).

Notes for question 77 (page 5)

This question cannot be left blank if your parents filed or will file a 2021 income tax return.

Income tax paid can be found on your 2021 IRS Form 1040 on line 22 minus Schedule 2—line 2. If negative, enter zero.

Note: The line numbers above are from the Internal Revenue Service tax form, not from the W-2 form.

Notes for question 78 (page 5)

Add the account balances of your parents' cash, savings, and checking accounts as of today. If the total is negative, enter zero as the total current balance. Round to the nearest dollar and do not include commas or decimal points.

Notes for question 79 (page 5)

Net worth means the current value, as of today, of investments, businesses, and/or investment farms minus debts related to those same investments, businesses, and/or investment farms. When calculating net worth, use 0 for investments or properties with a negative value.

Investments include real estate (do not include the home in which you live), rental property (includes a unit within a family home that has its own entrance, kitchen, and bath rented to someone other than a family member), trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, installment and land sale contracts (including mortgages held), commodities, etc.

Investments also include qualified educational benefits or education savings accounts (e.g., Coverdell savings accounts, 529 college savings plans, and the refund value of 529 prepaid tuition plans). For a student who does not report parental information, the accounts owned by the student (and/or the student's spouse) are reported as student investments. For a student who must report parental information, the accounts are reported as parental investments, including all accounts owned by the student and all accounts owned by the parents for any member of the household.

Investments do not include the home you live in, the value of life insurance, ABLE accounts, retirement plans (401[k] plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.) or cash, savings, and checking accounts already reported in question 29 and 78.

Investments also do not include UGMA and UTMA accounts for which you are the custodian but not the owner.

Investment value means the current balance or market value of these investments as of today. Investment debt means only those debts that are related to the investments.

Notes for question 80 (page 5)

Enter the net worth (current value minus debt) of the current businesses and/or investment farms that your parents own as of today.

Business and/or investment farm value includes the market value of land, buildings, machinery, equipment, inventory, etc. Business and/or investment farm debt means only those debts for which the business or investment farm was used as collateral.

Business value does not include the value of a small business if your family owns and controls more than 50% of the business and the business has 100 or fewer full-time or full-time equivalent

employees. For small business value, your family includes (1) persons directly related to you, such as a parent, sister, or cousin, or (2) persons who are or were related to you by marriage, such as a spouse, stepparent, or sister-in-law.

Investment farm value does not include the value of a family farm that your parents live on and operate.

Notes for question 81 (page 5)

This question is unrelated to previous tax years and is asking about your parent's current situation. The financial aid administrator at your college may require you to provide proof that your parent is a dislocated worker. In general, a person may be considered a dislocated worker if the person:

- is receiving unemployment benefits due to being laid off or losing a job and is unlikely to return to a previous occupation; or
- has been laid off or received a lay-off notice from a job; or
- was self-employed but is now unemployed due to economic conditions or natural disaster; or
- is the spouse of an active duty member of the Armed Forces and has experienced a loss of employment because of relocating due to permanent change in duty station; or
- is the spouse of an active duty member of the Armed Forces and is unemployed or underemployed, and is experiencing difficulty in obtaining or upgrading employment; or
- is a displaced homemaker. A displaced homemaker is generally a person who previously provided unpaid services to the family (e.g., a stay-at-home mom or dad), is no longer supported by the spouse, is unemployed or underemployed, and is having trouble finding or upgrading employment.

Note: If a person quits work, generally they are not considered a dislocated worker even if, for example, the person is receiving unemployment benefits. This situation excludes a spouse of an active duty member of the Armed Forces.

Notes for question 82a (page 5)

Your parent will only have this information if a 2021 federal tax return was submitted.

- If your parents filed separate tax returns, add IRS Form 1040 Schedule 3—line 3 from both tax returns and enter the total amount.
- If one or both parents will file a federal tax return, but haven't yet filed, estimate the amount that will appear in the line noted above.

Note: The line number (IRS Form 1040 Schedule 3—line 3) is from the IRS tax form, not from the W-2 form.

Notes for question 82b (page 5)

Enter the total amount of child support your parents paid because of divorce or separation or as a result of a legal requirement in 2021. Don't include child support paid for children in your parents' household. Round to the nearest dollar and do not include commas or decimal points.

Notes for question 82c (page 6)

Enter the total amount of taxable earnings that your parents received in 2021 from Federal Work-Study or other need-based work programs such as fellowships and assistantships.

Federal Work-Study is income earned from work. This income would appear on your parents W-2 forms and should be reported here, whether or not your parents filed taxes.

Notes for question 82d (page 6)

Enter the total amount of grant and scholarship aid reported to the IRS as part of your parents adjusted gross income (AGI) for 2021.

This is student aid that was also considered taxable and included in the parents' AGI. In most cases, grant and scholarship aid is not

reported on the tax return as part of your AGI unless the amount you received exceeds your educational expenses (tuition, fees, books, supplies, or equipment). See IRS Publication 970 for more information.

Student aid types to report as part of the AGI may include:

- Grants
- Scholarships
- Waivers/Remissions
- Fellowships/Assistantships (grant or scholarship portions)
- AmeriCorps education awards
- AmeriCorps living allowances (but not insurance or child care payments)
- AmeriCorps interest accrual payments (for student loan interest that accrued during your AmeriCorps term of service).

Notes for question 82e (page 5)

Enter the total amount of taxable combat pay or special combat pay that your parents received in 2021. Only enter the amount that was taxable and included in the adjusted gross income. Do not enter untaxed combat pay reported on the W-2 in Box 12, Code Q.

Notes for question 82f (page 5)

Enter the total amount of income earned from work under a cooperative education program offered by a college your parents received in 2021.

Report the total annual amount your parents received.

- If your parents received the same dollar amount every month, multiply the amount by the number of months your parents received it. The result is the total annual amount.
- If your parents did not receive the same amount each month, add together the amounts your parents received each month. The result is the total annual amount.

Notes for question 83a (page 6)

Enter the total amount of tax-deferred pension and savings plans (paid directly or withheld from your earnings) your parents received in 2021. These amounts are reported on the W-2 form in boxes 12a through 12d, codes D, E, F, G, H, and S. These include but are not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H and S. Don't include amounts reported in code DD (employer contributions toward employee health benefits).

Notes for question 83b (page 6)

Enter the total amount of IRA deductions and payments to self-employed SEP, SIMPLE and Keogh your parents received in 2021. Round to the nearest dollar and do not include commas or decimal points.

Note: The line number references above are from the IRS tax form, not from the W-2 form.

Notes for question 83c (page 6)

Enter the total amount of child support your parents received in 2021 for all children in your household.

- If they received the same dollar amount every month, multiply the amount by the number of months they received it. The result is the total annual amount.
- If they did not receive the same amount each month, add together the amounts they received each month. The result is the total annual amount.

Note: Do not include foster care or adoption payments.

Notes for question 83d (page 6)

Enter the total amount of tax-exempt interest income your parents received in 2021.

If your parents filed: IRS Form 1040 - Use Line: 2a

Note: The line number references above are from the IRS tax form,

not from the W-2 form.

Notes for question 83e (page 6)

Enter the total amount of the untaxed portions of IRA distributions your parents received in 2021. If the total is a negative amount, enter a zero (0).

If your parents filed IRS Form 1040, use (lines 4a + 5a) minus (lines 4b + 5b).

Notes for question 83f (page 6)

Enter the total cash value of housing, food, and any other living allowances your parents received in 2021. These allowances are often paid to military, clergy, and others.

Do not include rent subsidies for low-income housing, the value of on-base military housing, or the value of a basic military allowance for housing.

Notes for question 83g (page 6)

Enter the total amount of veterans non-education benefits your parents received in 2021. Round to the nearest dollar and do not include commas or decimal points.

Veterans non-education benefits include Disability, Death Pension, Dependency and Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances.

Do not include veterans educational benefits such as the Montgomery GI Bill, Dependents Education Assistance Program, VA Vocational Rehabilitation Program, VEAP Benefits, or Post-9/11 GI Bill.

- If your parents received the same dollar amount every month, multiply the amount by the number of months they received it. The result is the total annual amount.
- If your parents did not receive the same amount each month, add together the amounts they received each month. The result is the total annual amount.

Notes for question 83h (page 6)

Enter the total amount of any other untaxed income or benefits your parents received for 2021, such as workers compensation, Black Lung Benefits, untaxed portions of Railroad Retirement Benefits, disability, etc. that your parents received. Also include untaxed portions of health savings accounts from IRS Form 1040 Schedule 1—line 13.

Do not include extended foster care benefits, student aid, earned income credit, child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Innovation and Opportunity Act educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements, (e.g., cafeteria plans), foreign income exclusion, or credit for federal tax on special fuels.

Notes for Submitting a Paper Copy TASFA

Each institution may have a different process for receiving paper copy TASFAs. Some institutions may prefer that a paper copy TASFA is mailed directly to the Financial Aid Office and other institutions may prefer that you upload or email a copy through a secure platform. Before submitting or mailing your application, [contact your institution's financial aid office](#) to clarify the procedure.

The information provided on the TASFA will be used by the receiving institution to calculate your student financial need and eligibility for state and institutional financial aid. For any questions on the submission process or to confirm your TASFA has been received, contact your institution's financial aid office directly.



Financial Aid Office

Contact Us:
P: (972)881-5760
Financialaid@collin.edu

2023 – 2024 SB1528 STATEMENT

Student Information

Name: _____ CWID: _____

To qualify for Texas SB 1528, the student is required to complete the following:
...if the person (student) is not a citizen or permanent resident of the United States, (sign) an affidavit stating that the person will apply to become a permanent resident of the United States as soon as the person becomes eligible to apply. Per Texas Education Code Title 3, Subtitle A, Chapter 54, Subchapter A, Sec 54.053. (3)(B)

I, _____, affirm that I will file an application to become a
(Student's printed name)

permanent resident at the earliest opportunity to do so.

Student signature

Date

Office use only:
Aid Year: _____ Campus: _____ Date: _____ RRAAREQ Code: SB1528 Status Code: _____ Initials: _____



Financial Aid Office

Contact Us:
P: (972) 881-5760
Financialaid@collin.edu

2023 – 2024 DEPENDENT VERIFICATION WORKSHEET

Student Information

Name: _____ CWID: _____

Your application has been selected by the Dept. of Education for review in a process called “Verification.” In this process, we are required by federal law (34 CFR, Part 668) to compare information from your Free Application for Federal Student Aid (FAFSA) with information from you (and your spouse if you are married) and your parent(s)/stepparents’ (if you are dependent) 2021 federal **tax transcripts** and/or other financial documents. If there are any discrepancies, we may request further clarification. If corrections are needed, we will make them on your behalf and notify you of the change. **It is important that you respond promptly to this request. We cannot award you financial aid until your file is complete.**

Dependent Student’s Family Information

List below the people in your parent(s)’ household. Include:

- Yourself and your parent(s) (including a stepparent) even if you don’t live with your parent(s).
- Your parent(s)’ other children if your parent(s) will provide more than half of their support from July 1, 2023, through June 30, 2024, or if the other children would be required to provide parental information if they were completing a FAFSA for 2023–2024. Include children who meet either of these standards, even if they do not live with your parent(s).
- Other people if they now live with your parent(s) and your parent(s) provide more than half of their support and will continue to provide more than half of their support through June 30, 2024.

Include the name of the college for any household member, excluding your parents, who will be enrolled at least half time, in a degree, diploma, or certificate program at a Title IV eligible postsecondary educational institution any time between July 1, 2023, and June 30, 2024. *If more space is needed, attach a separate page with your name and Student ID Number at the top.*

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time
<i>Marty Jones(example)</i>	<i>28</i>	<i>Wife</i>	<i>Central University</i>	<i>Yes</i>
		<i>Self</i>		

Office use only:

Aid Year: _____ **Campus:** _____ **Date:** _____ **RRAAREQ Code:** DVST20 **Status Code:** _____ **Initials:** _____

Student's Name: _____

CWID: _____

Income Information to Be Verified

1. Student Information:

A. **TAX RETURN FILERS** - Check one of the following:

- I, the student, certify that I have used the IRS Data Retrieval Tool in FAFSA on the Web to transfer my 2021 IRS income information into my FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. I also certify that I DID NOT MAKE CHANGES to any of the data once it was transferred.

Your Financial Aid Advisor will verify that you a) used the IRS Data Retrieval Tool in FAFSA and b) made NO CHANGES to the data once it was transferred. If they can confirm both items, they will use the IRS information that was transferred. However, if the Financial Aid Advisor cannot confirm one or both of the above, you will be required to submit a 2021 tax transcript.

- I, the student, was unable or chose not to use the IRS Data Retrieval Tool in FAFSA on the Web, and am submitting to the school my **2021 IRS Tax Return Transcript(s)**—NOT photocopies of the income tax return.

To obtain an IRS Tax Return Transcript, go to www.irs.gov and click on the "Get Transcript" link, or call 1-800-908-9946.

*Make sure to request the "IRS Tax Return Transcript" and **not** the "IRS Tax Account Transcript." You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2017 IRS tax return was filed). It takes up 2 - 3 weeks for IRS income information to be available for electronic IRS tax return filers, and 8 - 11 weeks for paper IRS tax return filers.*

*If you filed an amended tax return, you will need to submit an "IRS Tax Return Transcript" and a signed copy of the **1040X**.*

B. **TAX RETURN NON-FILERS** – Complete this section if you, the student, will not file and are not required to file a 2021 income tax return with the IRS. If you fall into either category below, you **MUST** provide a Verification of Non-Filing Letter from the IRS with this form.

Check the box that applies:

- I, the student, was not employed and had no income earned from work in 2021.

- I, the student, was employed in 2021 and have listed below the names of all employers and the amount earned from each employer in 2021. Attach copies of all 2021 W-2 forms issued to you by employers. *If more space is needed, attach a separate page with your name and CWID at the top.*

Employer's Name	2021 Amount Earned
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00</i>

Please note: Per federal regulations, you are required to submit a 2021 Federal Tax Return Transcript. All tax filers use IRS Form 1040 and any applicable numbered or lettered IRS schedules. Instructions for obtaining a tax transcript can be found above. Please make copies of the tax transcript for your own records PRIOR to submitting the verification paperwork to our office.

Student's Name: _____

CWID: _____

2. Parent Information:

A. TAX RETURN FILERS - Check one of the following:

I, the student's parent, certify that I have used the IRS Data Retrieval Tool in FAFSA on the Web to transfer my (and, if married, my spouse's) 2021 IRS income information into my FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. I also certify that I DID NOT MAKE CHANGES to any of the data once it was transferred.

The Financial Aid Advisor will verify that you a) used the IRS Data Retrieval Tool in FAFSA and b) made NO CHANGES to the data once it was transferred. If they can confirm both items, they will use the IRS information that was transferred. However, if the Financial Aid Advisor cannot confirm one or both of the above, you will be required to submit a 2021 tax transcript.

I, the student's parent, was unable or chose not to use the IRS Data Retrieval Tool in FAFSA on the Web, and am submitting to the school my (and my spouse's if married) **2021 IRS tax return transcript(s)**—NOT photocopies of the income tax return.

To obtain an IRS tax return transcript, go to www.irs.gov and click on the "Get Transcript" link, or call 1-800-908-9946.

*Make sure to request the "IRS Tax Return Transcript" and **not** the "IRS Tax Account Transcript." See the student's section on page 2 for more ordering information.*

*If you filed an amended tax return, you will need to submit an "IRS Tax Return Transcript" and a signed copy of the **1040X**.*

B. TAX RETURN NON-FILERS—Complete this section if you, the student's parent(s), will not file and are not required to file a 2021 income tax return with the IRS. If you fall into either category below, you **MUST** provide a Verification of Non-Filing Letter from the IRS with this form.

Check the box that applies:

I, the student's parent, (and/or, if married, your spouse) was not employed and had no income earned from work in 2021.

I, the student's parent, (and/or, if married, your spouse) was employed in 2021 and have listed below the names of all employers and the amount earned from each employer in 2021. Attach copies of **all** 2021 W-2 forms issued to you (and, if married, to your spouse) by employers. *If more space is needed, attach a separate page with your name and CWID at the top.*

Employer's Name	2021 Amount Earned
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00</i>

Student's Name: _____

CWID: _____

3. Other Information to Be Verified

1. Both the student and the parent need to complete the chart below. Please put \$0's in any space where the answer is \$0. Do not leave blank.

Student	2021 ADDITIONAL FINANCIAL INFORMATION	Parent(s)
\$	Taxable earnings from need-based employment programs such as Federal Work-Study and need-based employment portions of fellowships and assistantships.	\$
\$	Grant and scholarship aid reported to the IRS in the adjusted gross income. Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.	\$
\$	Combat pay or special combat pay. Only enter the amount that was taxable and included in the adjusted gross income. Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).	\$
\$	Earnings from work under a Cooperative Education Program offered by a college.	\$
Student	2021 UNTAXED INCOME	Parent(s)
\$	Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings) including, but not limited to, amounts reported on the W-2 Form (Boxes 12a through 12d, codes D, E, F, G, H, and S).	\$
\$	Child support you received for all children. Do not include foster care or adoption payments.	\$
\$	Housing, food and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits). Do not include the value of on-base military housing or the value of a basic military allowance for housing.	\$
\$	Veterans' non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$
\$	Other untaxed income not reported, such as worker's compensation, disability, Black Lung Benefits, untaxed portions of health savings accounts from IRS Form 1040 Line 25, Railroad Retirement Benefits, etc. DO NOT INCLUDE: student aid, earned income credit, additional child tax credit, TANF payments, untaxed Social Security benefits, Supplemental Security Income (SSI), Workforce Investment Act educational benefits, combat pay, benefits from flexible spending arrangements (e.g. cafeteria plans), foreign income exclusion, or credit for federal tax on special fuels.	\$
\$	Money received , or paid on your behalf (e.g., bills), not reported elsewhere on this form.	XXXXXXXX

Certification and Signatures

By signing this worksheet, I (we) certify that all information reported on this worksheet is complete and correct. If dependent, at least one parent must sign. **Warning:** If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Student's Signature

Date

Parent's Signature

Date