



UHCL - Office of Financial Aid
2024-2025
TASFA CHECKLIST

2024-2025 TASFA Application

- All sections of the application must be complete. (**No blanks**) Please provide “physical” signature where a signature is required.

HB 1403/SB 1528 Residency Info

- Complete/submit **Affidavit of Intent** to Office of Admissions

This determines eligibility under the HB 1403/SB 1528 residency requirements. Only applicants with Texas Residency status will be considered eligible candidates for TASFA awards. If you have questions or concerns regarding your residency status, you are encouraged to contact the Admissions Office at 281-283-2500 or via e-mail at residency@uhcl.edu.

Student - Tax Documents

Filed 2022 Tax Return – submit documentation below:

- 2022 Student and Spouse Tax Return Transcript** (NOT Tax Account Transcript) –You can obtain a copy online via <http://www.irs.gov/Individuals/Get-Transcript>.
- 2022 Student and Spouse W2s or Wage and Income Transcript** - which can be obtained via <http://www.irs.gov/Individuals/Get-Transcript>.

Did NOT file 2022 Tax Return – submit documentation below:

- 2024/2025 Student Non-Filer Form** – Please complete the either the Dependent or Independent Student section and provide a “physical” signature on the bottom of the page. (<https://www.uhcl.edu/costs-aid/forms-resources/>)

Parent - Tax Documents

Filed 2022 Tax Return – submit documentation below:

- 2022 Parent Tax Return Transcript** (NOT Tax Account Transcript) –You can obtain a copy online via <http://www.irs.gov/Individuals/Get-Transcript>.
- 2022 Parent W2s or Wage and Income Transcript** - which can be obtained via <http://www.irs.gov/Individuals/Get-Transcript>.

Did NOT file 2022 Tax Return – submit documentation below:

- 2024/2025 Parent Non-Filer Form** – Please complete and provide a “physical” signature on the bottom of the page. (<https://www.uhcl.edu/costs-aid/forms-resources/>)

Selective Service (Male Students ONLY)

- Proof of Selective Service registration**

Male students must verify their current Selective Service registration status and provide proof of registration.

*** The Selective Service registration card must be signed by the student.***

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 2024-25 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.

DO NOT COMPLETE BOTH THE FAFSA AND TASFA.

The 2024-25 state financial aid priority application deadline for many institutions of higher education is **March 15, 2024**. It is important to complete and submit this application with all required documentation to the financial aid office **on or before March 15** to be considered for the most financial aid possible.

To complete this application, answer each item within each applicable 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 7-12**. If you have further questions about this form, contact the financial aid office at your institution. More information on the TASFA can be found at www.highered.texas.gov/our-work/empowering-our-students/tasfa/.

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? _____ [] 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 2024-25 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 2024-25 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 MARITAL STATUS

17. What is your marital status as of today? <input type="checkbox"/> Single (<i>never married</i>) <input type="checkbox"/> Separated <input type="checkbox"/> Married (<i>not separated</i>) <input type="checkbox"/> Divorced <input type="checkbox"/> Remarried <input type="checkbox"/> Widowed	18. Month and year you were married, remarried, separated, divorced, or widowed. Month: _____ Year: _____ <input type="checkbox"/> N/A
19. Spouse's Last Name _____ <input type="checkbox"/> N/A	20. Spouse's First Name _____ <input type="checkbox"/> N/A
21. What is your spouse's Social Security Number (SSN), Individual Taxpayer Identification Number (ITIN), Deferred Action for Childhood Arrivals (DACA) number? _____ <input type="checkbox"/> N/A	

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 22-29*.

22. How much did you earn from working in 2022? _____ <input type="checkbox"/> N/A	23. How much did your spouse earn from working in 2022? _____ <input type="checkbox"/> N/A
24. For 2022, 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 (<i>Skip to question 30</i>)	25. What income tax return did you file or will file for 2022? <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
26. What is or will be your tax filing status for 2022? <input type="checkbox"/> Single <input type="checkbox"/> Head of Household <input type="checkbox"/> Married filing jointly <input type="checkbox"/> Married filing separately <input type="checkbox"/> Qualifying surviving spouse	27. Did (or will) you file a Schedule A, B, D, E, F or H with your 2022 tax return? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know
28. What was your (and spouse's) adjusted gross income for 2022? Adjusted gross income is on IRS Form 1040—line 11. _____	29. Enter your (and spouse's) income tax paid for 2022 from 1040—line 22 minus Schedule 2—line 2. If negative, enter 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 you (and your spouse if applicable). See *Notes for questions 30-43*.

STUDENT ASSETS

30. 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>	
31. 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. Net worth is the value of the investments minus any debts owed against them.</i>	
32. As of today, what is the net worth of your (and spouse's) current businesses and/or investment farms? <i>Enter the net worth of the student's businesses or for-profit agricultural operations. Net worth is the value of the businesses or farms minus any debts owed against them.</i>	
33. Child support received for any of your children. Don't include foster care or adoption payments.	

STUDENT 2022 ADDITIONAL FINANCIAL INFORMATION AND UNTAXED INCOME

34. Education credits (American Opportunity Tax Credit and Lifetime Learning Tax Credit) from IRS Form 1040 Schedule 3—line 3.	
35. 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.	
36. 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.	
37. Tax exempt interest income from IRS Form 1040—line 2a.	
38. Untaxed portions of IRA distributions from IRS Form 1040—line 4a minus 4b.	

39. IRA rollover into another IRA or qualified plan.	
40. Untaxed portions of pensions from IRS Form 1040—line 5a minus 5b.	
41. Pension rollover into an IRA or other qualified plan.	
42. Net profit or loss from IRS Form 1040— line 31 of Schedule C.	
43. Foreign earned income exclusion from IRS Form 1040— line 8d of Schedule 1.	

SECTION 2: STUDENT STATUS DETERMINATION

Answer all questions. See Notes for questions 44-56.

44. Were you born before January 1, 2001?	[] Yes [] No
45. As of today, are you married?	[] Yes [] No
46. At the beginning of the 2024-2025 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
47. Are you currently serving on active duty in the U.S. Armed Forces for purposes other than training?	[] Yes [] No
48. Are you a veteran of the U.S. Armed Forces?	[] Yes [] No
49. Do you have children who will receive more than half of their support from you between July 1, 2024 and June 30, 2025?	[] Yes [] No
50. 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, 2025?	[] Yes [] No
51. 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
52. As determined by a court in your state of residence, are you or were you an emancipated minor?	[] Yes [] No
53. 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
54. At any time on or after July 1, 2023, did your high school, school district homeless liaison/designee, or financial aid administrator determine that you were an unaccompanied youth who was homeless?	[] Yes [] No
55. At any time on or after July 1, 2023, did the director or designee of an emergency or transitional shelter, street outreach program, homeless youth drop-in center, or other program serving those experiencing homelessness, determine that you were an unaccompanied youth who was homeless.	[] Yes [] No
56. At any time on or after July 1, 2023, did the director or designee 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.

57. As of today, what is the marital status of your legal parents?

- Single (*never married*) Separated
 Married (*not separated*) Divorced
 Remarried Widowed
 Unmarried and both legal parents living together

58. Month and year your parents were married, remarried, separated, divorced, or widowed:

Month: _____ Year: _____ N/A (Never Married)

PARENT 1

59. Last Name		60. First Name	
61. Date of Birth		62. What is your Parent 1's Social Security Number (SSN), Individual Taxpayer Identification Number (ITIN), Deferred Action for Childhood Arrivals (DACA) number? _____ <input type="checkbox"/> N/A	
63. Phone Number		64. Email Address	
65. Highest level of education completed: <input type="checkbox"/> Middle School/Jr. High <input type="checkbox"/> High School <input type="checkbox"/> College or Beyond <input type="checkbox"/> Other/Unknown			

PARENT 2 (IF APPLICABLE)

66. Last Name		67. First Name	
68. Date of Birth		69. What is your Parent 2's Social Security Number (SSN), Individual Taxpayer Identification Number (ITIN), Deferred Action for Childhood Arrivals (DACA) number? _____ <input type="checkbox"/> N/A	
70. Phone Number		71. Email Address	
72. Highest level of education completed: <input type="checkbox"/> Middle School/Jr. High <input type="checkbox"/> High School <input type="checkbox"/> College or Beyond <input type="checkbox"/> 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 73-80*.

73. How much did Parent 1 earn from working in 2022? _____	74. How much did Parent 2 earn from working in 2022? _____ (If applicable)
75. For 2022, have your parents completed an IRS income or another tax return? <input type="checkbox"/> Already completed <input type="checkbox"/> Will file <input type="checkbox"/> Not going to file (<i>skip to question 81</i>)	76. What income tax return did your parents file or will file for 2022? <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
77. What is or will be your parents' tax filing status for 2022? <input type="checkbox"/> Single <input type="checkbox"/> Head of household <input type="checkbox"/> Married filing jointly <input type="checkbox"/> Married filing separately <input type="checkbox"/> Qualifying surviving spouse	78. Did (or will) your parents file a Schedule A, B, D, E, F or H with their 2022 tax return? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know
79. Enter your parents' 2022 adjusted gross income from IRS Form 1040—line 11. _____	80. Enter your parents' 2022 income tax paid from 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 81-94.

PARENT ASSETS

81. As of today, what is your parents' total current balance of cash, savings, and checking accounts? <i>Don't include student financial aid.</i>	
82. 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. Net worth is the value of the investments minus any debts owed against them.</i>	
83. As of today, what is the net worth of your parents' current businesses and/or investment farms? <i>Enter the net worth of the parents' businesses or for-profit agricultural operations. Net worth is the value of the businesses or farms minus any debts owed against them.</i>	
84. Child support received for any of your parents' children. Don't include foster care or adoption payments.	

PARENT 2022 ADDITIONAL FINANCIAL INFORMATION AND UNTAXED INCOME (ENTER THE COMBINED AMOUNTS FOR YOUR PARENTS)

85. Education credits (American Opportunity Tax Credit and Lifetime Learning Tax Credit) from IRS Form 1040 Schedule 3—line 3.	
86. 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.	
87. 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.	
88. Tax exempt interest income from IRS Form 1040—line 2a.	
89. Untaxed portions of IRA distributions from IRS Form 1040—line 4a minus 4b.	
90. IRA rollover into another IRA or qualified plan.	
91. Untaxed portions of pensions from IRS Form 1040—line 5a minus 5b.	
92. Pension rollover into an IRA or other qualified plan.	
93. Net profit or loss from IRS Form 1040— line 31 of Schedule C.	
94. Foreign earned income exclusion from IRS Form 1040— line 8d of Schedule 1.	

SECTION 4: FAMILY INFORMATION**FEDERAL BENEFITS RECEIVED**

This information being collected below will 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.

At any time during 2022 or 2023, did you or anyone **in your family** (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.

95. Medicaid, including the Children's Health Insurance Program (CHIP), Supplemental Security Income (SSI), or refundable credit for coverage under a qualified health plan (QHP)	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Prefer not to answer
96. 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
97. Free and Reduced-Price School Lunch Program	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Prefer not to answer
98. 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
99. 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
100. Earned Income Credit (EIC)	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Prefer not to answer
101. Federal Housing Assistance	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Prefer not to answer

FAMILY SIZE

If you answer **“NO”** to all questions in **SECTION 2 (44-56)**, use these instructions to calculate your totals for questions 102 and 103.

- **Total number in family:** Include your parent (and spouse), yourself, your parent’s dependent children (even if they live apart because of college enrollment), and other people living with your parent now. Include these dependent children and other people only if your parent will provide more than half of their support between July 1, 2024, and June 30, 2025.
- **Total number in college for 2024-25:** Always count yourself as a college student. **Do not include your parents.**

If you answer **“YES”** to any question in **SECTION 2 (44-56)**, use these instructions to calculate your totals for questions 102 and 103.

- **Total number in family:** Include yourself (and spouse), your dependent children (even if they live apart due to college enrollment), and other people living with you now. Include these dependent children and other people only if you will provide more than half of their support between July 1, 2024, and June 30, 2025.
- **Total number in college for 2024-25:** Always count yourself as a college student.

102. How many people are in your family? (see instructions above) _____

103. How many people in your family will be college students between July 1, 2024 and June 30, 2025? (see instructions above) _____

SECTION 5: COLLEGE INFORMATION

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.

104. What college do you plan to attend for 2024-25? (response optional) _____

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

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

SECTION 6: SIGNATURE

I confirm 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 44-56) were answered **“NO.”***

Mark which parent signed above. Parent 1 Parent 2

Submitting the TASFA: Your completed application should be sent directly to the institution that you plan to attend for the 2024-25 school year. Contact the institution’s financial aid office for additional instructions (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 **2024-25** award year if you need additional assistance completing this application.

Students who are classified by the institution as a **Texas Resident** who cannot apply for federal financial aid, using the Free Application for Federal Student Aid (FAFSA), are encouraged to complete the TASFA. To see if you can fill out the FAFSA, please visit www.studentaid.gov. **Do not complete both the FAFSA and TASFA.** If you are not sure which application to complete, visit the [TASFA webpage](#), and use the online decision tool to guide you: [TASFA Decision Tool](#).

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.

Note: 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 the purpose 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 21 (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.

Notes for questions 22 and 23 (page 2)

Enter 2022 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 (or 1040-NR): Line 1z + Schedule 1: lines 3 + 6. If the student is married, spouse earnings must be included, whether taxes were filed together or separately.

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

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: 2022 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 24 (page 2)

If you indicate you "Will file" a 2022 tax return and your 2022 income is similar to your 2021 income, use your 2021 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 25 (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](https://www.federalreserve.gov/releases/h10/current).

Notes for question 26 (page 2)

If you filed or will file an IRS Form 1040 tax return, select your tax return filing status for 2022 from the "Filing Status" field:

- Single
- Head of household
- Married filing jointly
- Married filing separately
- Qualifying surviving spouse

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

Notes for question 28 (page 2)

If you filed a 2022 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 2022 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 2022 IRS Form 1040 to your spouse's 2022 income earned from working (for example, earnings from the W-2 form[s] and/or any other earning statements).

Notes for question 29 (page 2)

This question cannot be left blank if you (and your spouse) filed or will file a 2022 income tax return.

Income tax paid can be found on your 2022 IRS Form 1040—line 22 minus Schedule 2—line 2. If negative, enter a zero.

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

Notes for question 30 (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 31 (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 education benefits or education savings accounts such as Coverdell savings accounts, 529 college savings plans, and the refund value of 529 prepaid tuition plans. If the student is required to report parent information on the TASFA form, parents should not report the value of education savings accounts for other children. Qualified education benefits or education savings accounts must be reported as an asset of the parent if the student is required to report parent information. If the student is not required to report parent information on the TASFA form, the education benefit or savings account is reported as an asset of the student. UGMA and UTMA accounts are considered the assets of the student and must be reported as an asset of the student on the TASFA form, regardless of whether the student is required to report parent information.

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.

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 32 (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.

Businesses and investment farms include businesses that you own (including a small or family-run business) or income-producing farms that you own (including the fair market value of land, buildings, livestock, unharvested crops, and machinery actively used in investment farms, agricultural, or commercial activities).

Businesses and investment farms do not include the value of crops that are grown solely for consumption by the student and their family or the home in which you live. If the home in which you live is also located on a farm that you own, do not include the net value of that principal residence in the net value of all farm assets. The principal residence may include the home, structures, and land that are adjacent to the home that are not being used, stored, or sold for farming or other commercial activities.

Notes for question 33 (page 2)

Enter the total amount of child support you (and your spouse) received in 2022 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 34 (page 2)

You will only have this information if you (or your spouse) submitted a 2022 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 35 (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 2022.

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 36 (page 2)

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 2022. 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 37 (page 2)

Enter the total amount of tax-exempt interest income you (and your spouse) received in 2022. 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 Questions 38-41 (pages 2-3)

Enter the total amount of the untaxed income or portions you (and your spouse) received in 2022. If the total is a negative amount, enter a zero (0).

A rollover occurs when funds are moved from one eligible retirement plan to another. Example: moving funds from a 401(k) to a Rollover IRA. Check with the IRS for rollover guidance.

SECTION TWO: STUDENT STATUS DETERMINATION

Notes for questions 44-56 (page 3)

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 44 (page 3)

If you were born on January 1, 2001, you should enter **"No."**

Notes for question 45 (page 3)

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 47 (page 3)

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 48 (page 3)

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, 2025.

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, 2025.

Notes for question 51 (page 3)

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 52 & 53 (page 3)

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 54-56 (page 3)

Answer "Yes" if you received a determination at any time on or after July 1, 2023, 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 57-94 (pages 4-5)

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.

Legal parents are biological or adoptive (regardless of gender), 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 the student.

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:

- you have left home due to an abusive or threatening family environment;
- you were abandoned by or estranged from your parents;
- you have refugee or asylee status and are separated from your parents, or your parents are displaced in a foreign country;
- you are a victim of human trafficking;
- you are incarcerated, or your parents are incarcerated, and contact with the parents would pose a risk to you; or
- Are otherwise unable to contact or locate their parents.

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 a student aid index (SAI) calculated without parental data.

Notes for question 57 (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 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 both parents provided an exactly equal amount of financial support during the past 12 months, or if they don't support the student financially, answer the questions about the parent with the greater income and assets. 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 62 and 69 (page 4)

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.

Notes for question 64 and 71 (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 65 and 72 (page 4)

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 73 and 74 (page 4)

Enter Parent 1 and Parent 2 (if applicable) 2022 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(or 1040-NR): Line 1z + Schedule 1: lines 3 + 6.

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

Notes for question 75 (page 4)

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 2022 tax return and your 2022 income is similar to your 2021 income, use your 2021 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 76 (page 4)

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 77 (page 4)

If a parent filed or will file an IRS Form 1040 tax return, you must select the tax return filing status for 2022 from the "Filing Status" field:

- Single
- Head of household
- Married filing jointly
- Married filing separately
- Qualifying surviving spouse

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

Notes for question 79 (page 4)

If your parents filed a 2022 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 2022 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 2022 IRS Form 1040 to your other parent's 2022 income earned from working (for example, earnings from the W-2 form[s] and/or any other earning statements).

Notes for question 80 (page 4)

This question cannot be left blank if your parents filed or will file a 2022 income tax return.

Income tax paid can be found on your 2022 IRS Form 1040—line 22 minus Schedule 2—line 2. If negative, enter a zero.

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

Notes for question 81 (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 82 (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 education benefits or education savings accounts such as Coverdell savings accounts, 529 college savings plans, and the refund value of 529 prepaid tuition plans. If the student is required to report parent information on the TASFA form, parents should not report the value of education savings accounts for other children. Qualified education benefits or education savings accounts must be reported as an asset of the parent if the student is required to report parent information. If the student is not required to report parent information on the TASFA form, the education benefit or savings account is reported as an asset of the student. UGMA and UTMA accounts are considered the assets of the student and must be reported as an asset of the student on the TASFA form, regardless of whether the student is required to report parent information.

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.

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 83 (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.

Businesses and investment farms include businesses that you own (including a small or family-run business) or income-producing farms that you own (including the fair market value of land, buildings, livestock, unharvested crops, and machinery actively used in investment farms, agricultural, or commercial activities).

Businesses and investment farms do not include the value of crops that are grown solely for consumption by the student and their family or the home in which you live. If the home in which you live is also located on a farm that you own, do not include the net value of that principal residence in the net value of all farm assets. The principal residence may include the home, structures, and land that are adjacent to the home that are not being used, stored, or sold for farming or other commercial activities.

Notes for question 84 (page 5)

Enter the total amount of child support your parents received in 2022 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 85 (page 5)

Your parents will only have this information if a 2022 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 86 (page 5)

Enter the total amount of grant and scholarship aid reported to the IRS as part of your parents adjusted gross income (AGI) for 2022.

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 87 (page 5)

Enter the total amount of IRA deductions and payments to self-employed SEP, SIMPLE and Keogh your parents received in 2022. 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 88 (page 5)

Enter the total amount of tax-exempt interest income your parents received in 2022.

If your parents filed a tax return: 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 89-92 (page 5)

Enter the total amount of the untaxed income or portions your parents received in 2022. If the total is a negative amount, enter a zero (0).

A rollover occurs when funds are moved from one eligible retirement plan to another. Example: moving funds from a 401(k) to a Rollover IRA. Check with the IRS for rollover guidance.

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.

If you have filled out a paper copy of the TASFA, you do not need to fill out the online TASFA. You should do one or the other but not both.

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.

For more information on the TASFA and frequently asked questions, visit <https://www.highered.texas.gov/our-work/empowering-our-students/tasfa/>.