



Office of Financial Aid

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financial-aid@utdallas.edu

2022-2023 TASFA Cover Sheet

Once we have received all requested documents on your To Do List, please allow our office up to 3 weeks to review and process the documents submitted.

Purpose

The Texas Application for State Financial Aid (TASFA) is used to calculate financial aid eligibility for students who are not U.S. Citizens or are not eligible for federal financial aid, but are classified as residents of the state of Texas under Senate Bill 1528.

Residency Status

Your residency status with UT Dallas must indicate that you are classified as a Texas resident under Senate Bill 1528 before we may process your TASFA. If you have not already done so, you will need to contact the Office of the Registrar in order to update your residency status. You may contact them by emailing residency@utdallas.edu or by calling 972-883-2342.

Required Supporting Documents

Along with the TASFA, please submit the following supporting documents:

Students:

- Your 2020 Tax Return Transcript (must be obtained from <https://www.irs.gov/>) or a copy of your IRS Tax Return Form 1040 and all numbered schedules
- If you did not file a 2020 tax return:
 - Student Non-Tax Filer Worksheet (available at <http://www.utdallas.edu/finaid/forms/>)
 - Copies of your 2020 IRS Form(s) W-2
 - **Independent Students Only:** An IRS Verification of Non-Filing Letter for 2020 (obtained from <https://www.irs.gov/>) or by submitting IRS Form 4506-T directly to the IRS via fax/mail)
- If you were born male and are over 18 years of age:
 - Proof of registration with Selective Service (visit <https://www.sss.gov/> for more information)

Parents of Dependent Students:

- Your parents' 2020 Tax Return Transcript (must be obtained from <https://www.irs.gov/>) or a copy of your Parents IRS Tax Return Form 1040 and all numbered schedules
- If your parent did not file a 2020 tax return:
 - Parent Non-Tax Filer Worksheet (available at <http://www.utdallas.edu/finaid/forms/>)
 - Copies of your parents' 2020 IRS Form(s) W-2
 - An IRS Verification of Non-Filing Letter for 2020 (obtained from <https://www.irs.gov/>) or by submitting IRS Form 4506-T directly to the IRS via fax/mail)

Note that additional documentation may be required upon review of your application. If additional documentation is needed to process your file, we will notify you by sending an email to your UT Dallas email account.

Please submit your completed TASFA and supporting documents to the Office of Financial Aid by:

Email: financial-aid@utdallas.edu or **Fax:** 972-883-6803 or **In-person drop-off:** Student Services Building, first floor

2022-23 TASFA

Texas Application for State Financial Aid

July 1, 2022 – June 30, 2023

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 fafsa.gov or contact the financial aid office at the institution you plan to attend for the 2022-23 award year. **Note:** 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 state financial aid priority application deadline for many institutions of higher education is **January 15, 2022** for the 2022-23 award year. In order to be considered for the most financial aid that may be available to you, it is important to complete and submit this application with all required documentation to the financial aid office **on or before Jan. 15**. **Note:** Texas residency and final eligibility for financial aid can only be determined by the institution that you plan to attend.

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 6-8**. If you have further questions about this form, contact the financial aid office at your institution. Some institutions have an online version of the TASFA; check with your institution before filling out the pdf or paper version. **Note:** Personal information collected on the TASFA is protected under the Family Educational Rights and Privacy Act (FERPA) of 1974.

SECTION ONE: STUDENT INFORMATION (See Notes for questions 5-6)

| | | | | | |
|---|--|---|---|---|--|
| 1. Last Name | | 2. First Name | | 3. M.I. | |
| 4. Date of Birth | | 5. Social Security Number, DACA Number, or N/A [] N/A | | 6. College Student ID # (If applicable) | |
| 7. Permanent Mailing Address | | | | | |
| 8. City | | 9. State | 10. Zip Code | 11. Phone Number | |
| 12. Email Address | | | | | |
| 13. What will your high school (HS) completion status be when you begin college in the 2022-23 school year? | | High school diploma [] | | Homeschooled [] (Skip to Question 16) | |
| | | General Educational Development (GED) certificate [] (Skip to Question 16) | | None of these [] (Skip to Question 18) | |
| 14. High School Name (If applicable) | | | | | |
| 15. High School City (If applicable) | | | 16. HS State (If applicable) | 17. Date of Graduation (HS or GED) | |
| 18. Will you have your first bachelor's degree before you begin the 2022-23 school year? [] Yes [] No | | | | | |
| 19. What will your college grade level be when you begin the 2022-23 school year? | | | 20. What degree or certificate will you be working on when you begin the 2022-23 school year? | | |
| Never attended college <input type="checkbox"/> | | | 1st bachelor's degree <input type="checkbox"/> | | |
| 1st year undergraduate <input type="checkbox"/> | | | 2nd bachelor's degree <input type="checkbox"/> | | |
| 2nd year undergraduate/sophomore <input type="checkbox"/> | | | Associate degree <input type="checkbox"/> | | |
| 3rd year undergraduate/junior <input type="checkbox"/> | | | Certificate or diploma <input type="checkbox"/> | | |
| 4th year undergraduate/senior <input type="checkbox"/> | | | Teaching credential <input type="checkbox"/> (nondegree program) | | |
| 5th year/other undergraduate <input type="checkbox"/> | | | Graduate or professional degree <input type="checkbox"/> | | |
| 1st year graduate/professional <input type="checkbox"/> | | | Other/undecided <input type="checkbox"/> | | |
| Continuing graduate/professional or beyond <input type="checkbox"/> | | | | | |

STUDENT INFORMATION continued... (See Notes for questions 24-29) Reminder: Fill in all questions or choose N/A.

21. Where do you plan to live during the 2022-23 school year?

- On-campus Off-campus With parent or relative

22. At the start of the 2022-23 school year, how many credits/hours will you be enrolled in?

- Full-time (12 hours or more) Three-quarter time (9-11 hours)
 Half-time (6-8 hours) Less than half-time (5 hours or less)
 Not sure

23. If you are transferring schools, have you earned an Associate Degree?

- Yes
 (Enter date you earned an Associate Degree: ____/____/____)
 No

24. Were you born male or female?

- Male
 Female

25. Have you been convicted of a felony, or crime involving a controlled substance?

- Yes No

26. Have you previously received Student Financial Aid from Texas?

- Yes No

27. (A) Do you have authorization to work in the United States?

- Yes No Don't know N/A

(B) If yes, are you interested in applying for a work-study program?

- Yes No Don't know

28. What is your current marital status?

- I am single I am separated
 I am married/remarried I am divorced or widowed

29. Month and year you were married, remarried, separated, divorced, or widowed. Month: _____ Year: _____ N/A

SELECTIVE SERVICE STATEMENT OF REGISTRATION STATUS

In accordance with [Texas Education Code, Section 51.9095](#), male students must file a Selective Service Statement of Registration Status with their institution or other entity granting financial assistance. For more information about the Selective Service System, visit sss.gov.

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 the age of 18. I am not registered with Selective Service and I am not exempt from registration with Selective Service.

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

SECTION TWO: STUDENT DEPENDENCY STATUS DETERMINATION (See Notes for questions 30 and 35-40) Reminder: Fill in all questions.

- | | | |
|---|------------------------------|-----------------------------|
| 30. Were you born before January 1, 1999? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 31. As of today, are you married? (Answer Yes if you are separated but not divorced.) | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 32. At the beginning of the 2022-23 school year, will you be working on a master's or doctorate program? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| (e.g., MA, MBA, JD, PhD, EdD, MD, graduate certificate, etc.) | | |
| 33. Do you now have or will you have children who will receive more than half of their support from you between July 1, 2022 and June 30, 2023?..... | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 34. 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, 2023?..... | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 35. At any time since you turned age 13, were you in foster care, were you a dependent or ward of the court, or were both your parent(s) deceased? (You do not have to currently be a ward of the court.)..... | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 36. As determined by the state's court, are you or were you an emancipated minor? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 37. As determined by the state's court, does someone other than your parent or stepparent have legal guardianship of you?..... | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 38. At any time on or after July 1, 2021, did your high school or school district's homeless liaison determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless?..... | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 39. At any time on or after July 1, 2021, 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 or were self-supporting and at risk of being homeless?..... | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 40. At any time on or after July 1, 2021, 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?.... | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

SECTION THREE: PARENT INFORMATION (See Notes for questions 41-56)

 **STOP:** If you answered “Yes” to any of the questions in **SECTION TWO**, parental information is **NOT** required. Proceed to **SECTION FOUR**.

If you answered “No” to all the questions in **SECTION TWO**, 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 further clarification. See the **TASFA Notes** page 7 if you believe you are unable to provide parental information because of a **special circumstance**.

PARENT MARITAL STATUS

41. As of today, what is the marital status of your legal parent(s)?

- Married or Remarried Never Married
 Divorced or Separated Both parents live together unmarried
 Widowed

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

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


PARENT 1

| | | | |
|---|--|------------------------------|-------------------------|
| 43. Last Name | | 44. First Name | |
| 45. Date of Birth | 46. Social Security Number, DACA Number, or N/A | <input type="checkbox"/> N/A | 47. Phone Number |
| 48. Email Address | | | |
| 49. 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)

| | | | |
|---|--|------------------------------|-------------------------|
| 50. Last Name | | 51. First Name | |
| 52. Date of Birth | 53. Social Security Number, DACA Number, or N/A | <input type="checkbox"/> N/A | 54. Phone Number |
| 55. Email Address | | | |
| 56. 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 | | | |

SECTION FOUR: INCOME INFORMATION

 **STOP:** If you answered “Yes” to any of the questions in **SECTION TWO**, parental information is **NOT** required in the purple section below. You are required to enter income information for only yourself (and your spouse, if applicable).

If you answered “No” to all the questions in **SECTION TWO**, you **must include** parental information, as defined in **SECTION THREE**.

PART A. EARNINGS (See Notes for questions 57-70) The financial aid office may require documentation, such as W-2s, tax returns, or tax transcripts.

| Student Earnings and Tax Information | Parent Earnings and Tax Information |
|---|--|
| 57. Did you (or your spouse) work in 2020? <input type="checkbox"/> Yes <input type="checkbox"/> No | 63. Did your parent(s) work in 2020? <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 58. If yes, how much did you (or spouse) earn from working in 2020? Student: _____ <input type="checkbox"/> N/A Spouse: _____ <input type="checkbox"/> N/A | 64. If yes, how much did your parent(s) earn from working in 2020? Parent 1: _____ <input type="checkbox"/> N/A Parent 2: _____ <input type="checkbox"/> N/A |
| 59. Did you (or spouse) file a 2020 tax return? Student: <input type="checkbox"/> Yes <input type="checkbox"/> No Spouse: <input type="checkbox"/> Yes <input type="checkbox"/> No | 65. Did your parent(s) file a 2020 tax return? Parent 1: <input type="checkbox"/> Yes <input type="checkbox"/> No Parent 2: <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 60. Was an Individual Taxpayer Identification Number (ITIN) used to file a 2020 tax return? If so, enter the ITIN below, or mark N/A. Student: _____ <input type="checkbox"/> N/A Spouse: _____ <input type="checkbox"/> N/A | 66. Was an Individual Taxpayer Identification Number (ITIN) used to file a 2020 tax return? If so, enter the ITIN below, or mark N/A. Parent 1: _____ <input type="checkbox"/> N/A Parent 2: _____ <input type="checkbox"/> N/A |
| 61. Enter your (or spouse) 2020 adjusted gross income from line 11 on IRS Form 1040. Student: _____ <input type="checkbox"/> N/A Spouse: _____ <input type="checkbox"/> N/A | 67. Enter your parents' 2020 adjusted gross income from line 11 on IRS Form 1040. Parent 1: _____ <input type="checkbox"/> N/A Parent 2: _____ <input type="checkbox"/> N/A |
| 62. Enter your (or spouse) 2020 income tax from IRS Form 1040—line 22 Student: _____ <input type="checkbox"/> N/A Spouse: _____ <input type="checkbox"/> N/A | 68. Enter your parents' 2020 income tax from IRS Form 1040—line 22 minus Schedule 2—line 2. If negative, enter a zero. Parent 1: _____ <input type="checkbox"/> N/A Parent 2: _____ <input type="checkbox"/> N/A |

| Student Earnings and Tax Information continued... | Parent Earnings and Tax Information continued... |
|---|---|
| <p>69. 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. (See Notes page 8.)</p> <p>Student <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> I don't know</p> <p>Spouse <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> I don't know</p> | <p>70. 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. (See Notes page 8.)</p> <p>Parent 1 <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> I don't know</p> <p>Parent 2 <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> I don't know</p> |

| For questions, 71-82, if the answer is zero or the question does not apply to you, enter "0." DO NOT LEAVE ANY BLANKS. Report whole dollar yearly amounts with no cents. | STUDENT | SPOUSE (If applicable) | PARENT 1 | PARENT 2 (If applicable) |
|--|---------|---------------------------|----------|-----------------------------|
|--|---------|---------------------------|----------|-----------------------------|

PART B. 2020 UNTAXED INCOME (See Notes for questions 71-76)

| | | | | |
|--|--|--|-----|-----|
| 71. Child support received for any of your children. | | | | |
| 72. Housing, food, and other living allowances paid to members of the military, clergy, and others. (See Notes page 8.) | | | | |
| 73. Other untaxed income not reported. (Such as worker's compensation, disability, veterans noneducation benefits, etc.) | | | | |
| 74. Cash earnings. (Income not already reported on taxes. Do NOT include W-2 earnings.) | | | | |
| 75. Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form. | | | N/A | N/A |
| 76. TOTAL UNTAXED INCOME (Automatically calculates if completed electronically.) | | | | |

PART C. 2020 ADDITIONAL FINANCIAL INFORMATION (See Notes for questions 77-79)

| | | | | |
|---|--|--|--|--|
| 77. Child support paid. | | | | |
| 78. Taxable earnings from work-study or other need-based work programs. | | | | |
| 79. Earnings from work under a cooperative education program offered by a college. | | | | |

PART D. 2020 ASSETS (See Notes for questions 80-82)

| | | | | |
|---|--|--|--|--|
| 80. As of today, what is your total current balance of cash, savings, and checking accounts? | | | | |
| 81. As of today, what is your net worth of investments, including real estate? | | | | |
| 82. As of today, what is your net worth of current businesses and/or investment farms? | | | | |

PART E. FEDERAL ASSISTANCE PROGRAMS

83. At any time during 2020 or 2021, did you, (your spouse), your parents, anyone in your household, or anyone in your parents' household receive benefits from any of the federal programs listed?

Mark all that apply or mark N/A.

Note: 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. This information will be only used to help determine eligibility for certain state financial aid.

| | | | | |
|---|---|---|---|--|
| <input type="checkbox"/> Medicaid or Supplemental Security Income (SSI) | <input type="checkbox"/> Supplemental Nutrition Assistance Program (SNAP) | <input type="checkbox"/> Free or Reduced-Price School Lunch | <input type="checkbox"/> Temporary Assistance for Needy Families (TANF) | <input type="checkbox"/> Special Supplemental Nutrition Program for Women, Infants, and Children (WIC) |
| <input type="checkbox"/> N/A | <input type="checkbox"/> N/A | <input type="checkbox"/> N/A | <input type="checkbox"/> N/A | <input type="checkbox"/> N/A |

2022-23 TASFA Notes

Texas Application for State Financial Aid

July 1, 2022 – June 30, 2023

These notes help explain certain questions on the TASFA. The **blue** items indicate a student (or spouse) question, and the **purple** items indicate a parent question. Contact the financial aid office at the institution you currently attend or plan to attend for the **2022-23** award year if you need additional assistance completing this application.

SECTION ONE: STUDENT INFORMATION

Notes for questions 5 and 6 (page 1)

Question 5. 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 do not have an assigned SSN, mark “N/A.”

Question 6. Enter your ID number issued by your college or university, if applicable.

Notes for question 24 (page 2)

Enter your gender at birth. Individuals who were born male are required to complete a **Selective Service Statement of Registration Status** and either be registered with Selective Service or be exempt from registration to be eligible for state financial aid ([Texas Education Code \(TEC\), Title 3, Section 51.9095](#)). If you are male and between the ages of 18 through 25, you can register 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. Male students over the age of 25 who knowingly and willfully failed to register with Selective Service are not eligible for state financial aid.

Selective Service Statement of Registration Status

- If you marked **I am under the age of 18 and not currently required to register**: Being under 18 and not yet registered does not impact your ability to receive financial aid for the academic year. Contact your current institution to confirm whether additional proof is required.
- If you marked **I am REGISTERED with the Selective Service**, follow up with the institution you plan to attend to see if anything additional is needed.
- If you marked **I am EXEMPT from registration**, please explain the reason why you are exempt from the federal registration requirement. For more information on the requirement, visit [www.sss.gov](#).
- If you marked **I am over the age of 18. I am not registered with Selective Service and I am not exempt from registration with Selective Service**, then you may not be eligible for state financial aid. Contact your current institution to discuss your eligibility status.

Notes for question 25 (page 2)

If you have been convicted of a felony or a crime involving a controlled substance, such as drugs or alcohol, enter “Yes.” If “Yes,” contact your institution’s financial aid office regarding additional documentation that may be requested (e.g., confirmation of eligibility).

Notes for question 26 (page 2)

State financial aid programs can include:

- Toward EXcellence, Access, and Success (TEXAS) Grant
- Texas Educational Opportunity Grant (TEOG)
- Tuition Equalization Grant (TEG)
- Texas College Work-Study (TCWS)
- Work-Study Student Mentorship Program (WSMP)
- College Access Loan (CAL)
- Texas Armed Services Scholarship Program (TASSP)
- Bilingual Education Program
- Exemptions or Waivers

Notes for question 27 (page 2)

- A. Your institution will require proof of your authorization to work in the United States (e.g., copy of your SSN card) if you are interested in applying for a work-study program.
- B. Work-study programs provide employment positions to eligible students with financial need.

Notes for questions 28 and 29 (page 2)

Question 28. 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 your institution.

Question 29. Enter the **month** and **year** of the status selected in **question 28**. If you have never been married, remarried, separated, divorced, or widowed, mark “N/A.”

SECTION TWO: STUDENT DEPENDENCY DETERMINATION

Notes for question 30 (page 2)

If you were born on January 1, 1999, you should enter “No.”

Notes for question 35 (page 2)

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

- You had no living parent (biological or adoptive), even if you are now adopted;
- You were in foster care, even if you are no longer in foster care today; or
- You were a dependent/ward of the court, even if you are no longer a dependent/ward of the court today.

If you are not sure if you were in foster care, check with your state’s child welfare agency. You can find that agency’s contact information at [www.childwelfare.gov/nfcad](#).

Notes for questions 36 and 37 (page 2)

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.

Enter “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, enter “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 Texas. The court must be located in your state of legal residence at the time the court’s decision was made.

Enter “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. 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 38-40 (page 2)

Enter “Yes” if you received a determination at any time on or after July 1, 2021, that you were an unaccompanied youth who was homeless or at risk of being homeless.

- **Homeless** - means lacking fixed, regular, and adequate housing, which includes living in shelters, motels, or cars, or temporarily living with other people because you had nowhere else to go.
- **Unaccompanied** - means you are not living in the physical custody of your parent or guardian.
- **Youth** - means you are 21 years of age or younger or you are still enrolled in high school as of the day you sign this application.

Answer “No” if you are not homeless or at risk of being homeless, or if you do not have a determination. You should contact your financial aid office for assistance if you do not have a determination but believe you are an unaccompanied youth who is homeless or are an unaccompanied youth providing for your own living expenses who is at risk of being homeless.

SECTION THREE: PARENT INFORMATION

Notes for questions 41-56 (page 3)

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.

Question 41 and 43-56. 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 parents’ marital status changes after you sign your TASFA, check with your financial aid office at your institution.

- 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 questions 43-49 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 “Both parents live together unmarried” and provide information in questions 43-56 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 live together, select “Both parents live together unmarried.” If your legal parents are separated but live together, select “Married or Remarried,” not “Divorced or Separated.” Answer questions 43-56 about both parents.
- If your legal parents are divorced or separated, answer questions 43-49 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 most recent year that you received support from a parent.) For instance, if you feel the support was equal (50/50), list information for the parent that provided at least 51% (slightly more) of your support for the year. If this parent is remarried as of today, answer questions 43-56 about that parent and your stepparent.

- If your widowed parent is remarried as of today, answer questions 43-56 about that parent and your stepparent.

Question 42. Enter the **month and year** of your parents’ marital status selected in **question 41**. If your parents have never been married, remarried, separated, divorced, or widowed, mark “N/A.”

SECTION FOUR: INCOME INFORMATION

PART A. EARNINGS

Notes for questions 57-58 (page 3)

Notes for questions 63-64 (page 3)

Question 57 and 63. Indicate whether you, your spouse, and/or your parent(s) worked anytime from January 1, 2020 through December 31, 2021. If you, as the student, are married, you must provide spouse income and information.

Question 58 and 64. Enter 2020 earnings (wages, salaries, tips, etc.), even if a tax return was not filed. This information may be on the W-2 forms or on the tax return: IRS Form 1040—line 1 + Schedule 1, lines 12 + 18, + Box 14 (Code A) of IRS Schedule K-1 (Form 1065). 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: 2020 Filing Requirements for Most Taxpayers. See <https://www.irs.gov/uac/About-Publication-17>.

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

Notes for questions 59 and 60 (page 3)

Notes for questions 65 and 66 (page 3)

Question 59 and 65. Indicate whether you, your spouse, and/or your parent(s) have completed a federal or foreign tax return for 2020. If “Yes,” you will be required to submit documents to your financial aid office (e.g., tax returns, tax transcripts, W-2s).

Question 60 and 66. Enter an Individual Taxpayer Identification Number (ITIN) for you, your spouse, and/or your parent(s), if used to file a 2020 tax return. **Note:** Mark “N/A” if an ITIN was not used to file a 2020 tax return.

Notes for question 61 and 62 (page 3)

Notes for question 67 and 68 (page 3)

Question 61 and 67. Adjusted gross income (AGI) is on IRS Form 1040—line 11. If you did not file a tax return, mark “N/A.”

Question 62 and 68. Income tax amount is the total of IRS Form 1040—line 22 minus Schedule 2—line 2. If negative, enter a zero. If you did not file a tax return, mark “N/A.” **Note:** Income tax is not income. It is the amount of tax that you, your spouse, or your parents paid on income earned.

Notes for question 69 (page 4)

Notes for question 70 (page 4)

In general, a person may be considered a dislocated worker if he or she:

- is receiving unemployment benefits due to being laid off or losing a job and is unlikely to return to a previous occupation;
- has been laid off or received a lay-off notice from a job; 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.

PART B. 2020 UNTAXED INCOME

Notes for questions

71-75 (page 4)

Question 71. Report child support that you, your spouse, or your parent(s), as applicable, received for all children during 2020. Do not include foster care or adoption payments.

Question 72. Enter 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 or report rent subsidies for low-income housing.

Question 73. Enter the total amount of untaxed income you, your spouse, or your parent(s), as applicable, received in 2020.

Examples of **untaxed income**:

- Payments to tax-deferred pension and retirement savings plans
- IRA deductions and payments to other qualified plans
- Tax-exempt interest income
- Untaxed portions of IRA distributions
- Untaxed portions of pensions
- Veterans noneducation benefits, such as disability, death pension, or dependency & indemnity compensation (DIC) and/or VA Educational Work-Study allowances
- Other untaxed income not reported may include workers' compensation, disability benefits, etc.

Do not include extended foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Innovation and Opportunity 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.

Question 74. Enter wages **not** listed on taxes or W-2 forms.

Question 75. Enter 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 is not part of a legal child support agreement.

PART C. 2020 ADDITIONAL FINANCIAL INFORMATION

Notes for questions

77-79 (page 4)

Question 77. Report any child support payments paid by you, your spouse, or your parent(s), as applicable, during 2020 as a result of divorce, separation, or some other legal requirement. These are payments that are made to a child (or children) not living in your or your parents' household.

Question 78. Report earnings from need-based work programs and need-based employment portions of fellowships and assistantships.

Question 79. Report any student grant and scholarship aid that was reported to the IRS on your or your parents' 2020 federal income tax return. This includes benefits such as awards, living allowances, and interest accrual payments as well as grant and scholarship portions of fellowships and assistantships.

PART D. 2020 ASSETS

Notes for questions

80-82 (page 4)

Question 80. Do not enter student financial aid awards in this amount.

Question 81. Net worth means current value minus debt. If net worth is negative, enter 0.

Question 82. Business and/or investment farm value includes the market value of lands, buildings, machinery, equipment, inventory, etc. Business and/or investment farm debt means only those debts for which the business or investment 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:

- Persons directly related to you
- 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, and/or your parent(s) live on and operate.

Notes for Submitting the TASFA

Each institution has a different process for receiving TASFAs. Some institutions may prefer that the TASFA is mailed directly to the Financial Aid Office where 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.