Make sure students fill out the correct TASFA form. The date on top refers to the academic year for which the student is requesting financial aid.

Make sure to answer both questions: 13 and 19. Question 19 refers to your college grade level.

Students should put their college ID # if they have it. If not, they should leave blank.
The housing plan section is important – this will determine the budget considered for financial aid purposes.

Some institutions will require proof or copy of DACA I-797 Form.

Males between 18 and 25 MUST register with the selective service. DO NOT send the registration forms to the financial aid office; send a copy of the card when received.

Many DREAMers are here without their parents (unaccompanied youth) and the probability of homelessness is much higher among this population. However, most students in this situation have not been identified nor are receiving services from school districts. Please refer possible homeless students to your district’s homeless service office. Homeless students are classified as independent and receive more services and possibly more aid. Immigration status is not a barrier to this classification. Please note, the student will need documentation of being classified as homeless.
STOP: if you answered “No” to any of the questions in STEP TWO, parental information is not required. Proceed to STEP FOUR.

If you answered “Yes” to any of the questions in STEP TWO, you must include parental information. Even if you do not live with your legal parents (biological, adoptive, or as determined by 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 or is remarried, divorced, separated, etc.), review the TASFA notes for further clarification.

### PARENT’S MARITAL STATUS

<table>
<thead>
<tr>
<th>Question</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>41. As of today, what is the marital status of your legal parents?</td>
<td>Married or Remarried, Divorced or Separated, Widowed, Unmarried and Both Parents Living Together</td>
</tr>
<tr>
<td>42. Month and year your parents were married, remarried, separated, divorced or widowed:</td>
<td>Month: ______ Year: ______ Not applicable</td>
</tr>
</tbody>
</table>

### PARENT 1 (Mother/Father/Stepparent)

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>43.</td>
<td>44.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date of Birth</th>
<th>Social Security Number or DACA # or Not Applicable</th>
<th>Phone Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>45.</td>
<td>46.</td>
<td>47.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Highest level of education completed.</th>
<th>Middle School/Jr. High</th>
<th>High School</th>
<th>College or Beyond</th>
<th>Other/Unknown</th>
</tr>
</thead>
<tbody>
<tr>
<td>48.</td>
<td>49.</td>
<td>50.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### PARENT 2 (Mother/Father/Stepparent)

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>51.</td>
<td>52.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date of Birth</th>
<th>Social Security Number or DACA # or Not Applicable</th>
<th>Phone Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>53.</td>
<td>54.</td>
<td>55.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Highest level of education completed.</th>
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<th>High School</th>
<th>College or Beyond</th>
<th>Other/Unknown</th>
</tr>
</thead>
<tbody>
<tr>
<td>56.</td>
<td>57.</td>
<td>58.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### PART A: EARNINGS

**Documentation will need to be submitted to the financial aid office.** (e.g. W-2, tax transcripts, tax returns, etc.)

<table>
<thead>
<tr>
<th>Student Earnings</th>
<th>Parent Earnings</th>
</tr>
</thead>
<tbody>
<tr>
<td>57. Did you (or spouse) work in 2017?</td>
<td></td>
</tr>
<tr>
<td>58. If yes, how much did you (and spouse) earn from working in 2017?</td>
<td></td>
</tr>
<tr>
<td>Student: ______ Spouse: ______</td>
<td></td>
</tr>
<tr>
<td>59. Did you (or spouse) file a 2017 tax return?</td>
<td></td>
</tr>
<tr>
<td>Student: Yes ______ No ______ Spouse: Yes ______ No ______</td>
<td></td>
</tr>
<tr>
<td>60. Was an Individual Taxpayer Identification Number (ITIN) used to file a 2017 tax return?</td>
<td></td>
</tr>
<tr>
<td>Student: ______ Spouse: ______</td>
<td></td>
</tr>
<tr>
<td>61. As of today, are you (or spouse) a dislocated worker (currently unemployed)?</td>
<td></td>
</tr>
<tr>
<td>Student: Yes ______ No ______ Don’t know ______ Spouse: Yes ______ No ______</td>
<td></td>
</tr>
</tbody>
</table>

**For tax filers, complete line 63. Non-tax filers should complete line 70. Please see financial aid office for guidance on how to report income.**

| 62. Did your parent(s) work in 2017?                                           |                 |
| 63. If yes, how much did your parent(s) earn from working in 2017?              |                 |
| Parent 1: ______ Parent 2: ______                                                |                 |
| 64. Did your parent(s) file a 2017 tax return?                                 |                 |
| Parent 1: Yes ______ No ______                                                  |                 |
| Parent 2: Yes ______ No ______                                                  |                 |
| 65. Was an Individual Taxpayer Identification Number (ITIN) used to file a 2017 tax return? |
| Parent 1: ______ Spouse: ______                                                  |                 |
| 66. As of today, is either parent a dislocated worker (currently unemployed)?   |                 |
| Parent 1: Yes ______ No ______ Don’t know ______ Parent 2: Yes ______ No ______|                 |
The majority of families will not have anything to report on B or C of Step 4. They should put 0 or NA.

If there is additional income not reported on income tax or if the family did not file, list amount(s) on question 70. Report for student and parent(s) only.

Non-tax filers should complete line 70. For tax filers, complete line 63. Please see financial aid office for guidance on how to report income.

If parents make below income threshold they need to explain the breakdown of expenses. Non-tax filer families also need to fill out and submit the Non-tax Filer Form discussed in the next section of this guide.
Follow FAFSA rules regarding parents and household definitions. If students are living with their families, they should include everyone in the household and any siblings attending college that may not live at home. If families support 50% or more a relative that is outside of the U.S. they should be included here. Students must include their parents and their dependents even if they are not living in the U.S. (even if the parents are not actually supporting the student). If student cannot be classified as an independent according to Section 1, but has no contact, the student might be able to qualify for a dependency override. Students should contact the financial aid office to inquire about procedure for a dependency override.

Parent signature is required for dependent students even if the parents are in another city, state, or country. Students can email TASFA to parents, ask them to print, sign the page, and mail the form back to the student. This can be a challenge if parents are in a rural or impoverished area; in extreme cases contact the financial aid office. Other relatives or guardians are NOT allowed to sign on behalf of the parent. Make sure to check the appropriate box for which parent signed according to how the parent is listed on page 3.

When in doubt, REFER TO THE TASFA INSTRUCTIONS or call the financial aid office at each institution. Sometimes there is a financial aid advisor in charge of handling TASFAs. The Texas Financial Aid Information Center is also a great resource (1-888-311-8881)
2019-20 TASFA Notes
Texas Application for State Financial Aid

July 1, 2019 – June 30, 2020

The following notes are to provide additional clarification to various questions listed on the TASFA application. The yellow items indicate a Student (and spouse) response is needed and the purple indicate a Parent(s) response is needed. If additional assistance is needed, please contact the institution’s financial aid office that you currently attend or plan to attend for 2019-20 award year.

STEP 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 of Childhood Arrivals (DACA), enter your assigned social security number (SSN) through this program. If you don’t have an assigned SSN, mark N/A.

Question 6. Enter your 10 number issued by your college or university, if applicable.

Notes for question 24 (page 2)

Enter your gender at birth.

In order to qualify for state financial aid, individuals who were born male are required to be registered for selective service or be exempt (Texas Education Code, Section 51.009). Males between the ages of 18 through 25 can register by obtaining a selective service registration form at a U.S. Post Office or by visiting www.ssw.gov. After a male reaches his 26th birthday, he can no longer register. Once submitted, a copy of your registration acknowledgment card must be provided to the institution. Additional forms or documentation will also be collected by the institution to confirm your selective service status. If you are currently of the age and gender, and request registration with Selective Service, but knowingly and willfully fail to do so, you are not eligible to receive funds from the State of Texas.

Notes for question 25 (page 2)

If you have been convicted of a felony or a crime involving a controlled substance (e.g., drugs, alcohol), enter “Yes.”

If “Yes,” see 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)
- B-On-Time (BOT)
- Top Ten Percent (Top 10%) Scholarship
- College Access Loan (CAL)
- Texas Armed Services Scholarship Program (TASSP)
- Bilingual Education Scholarship Program
- Exemptions
- Waivers

Notes for question 27 (page 2)

A. Texas College Work-Study (TCWS) is a state program that provides employment positions to eligible students with financial need.

B. If you have been approved for Deferred Action of Childhood Arrivals (DACA), you may be eligible for the Texas College Work-Study Program. Your college will require proof of your authorization to work in the U.S. (e.g. copy of your SSN card).

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 your 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, remained, separated, divorced or widowed, mark “Not applicable.”

STEP TWO: STUDENT DEPENDENCY DETERMINATION

Notes for question 30 (page 2)

If you were born on January 1, 1996, 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 unsure 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/ncd.

Notes for question 36 (page 2)

Enter “Yes” if you can provide a copy of the court’s decision that as of today, you are an emancipated minor. Also, enter “Yes” if you can provide a copy of a court’s decision that you were emancipated 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 question 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 in legal guardianship. Also, enter “Yes” if you can provide a copy of a court’s decision that you were in legal guardianship 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’s decision is no longer in effect or the court’s 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.
Step Three: Parent Information

Notes for questions 41-56 (page 3)

Question 41: Report your legal parent’s marital status as of the date you sign your TASFA (enter married if they are separated but not divorced). If your legal parent’s 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 legal parent, or if your parent is widowed and not remarried, answer the question about that parent.
- If your legal parent is a single parent (including a single legal parent in a domestic partnership or a single legal parent co-parenting with the biological or adoptive parent), you are considered a single-parent family for financial aid purposes.
- If you are a single legal parent or have a single legal parent, you do not need to provide information about the other parent(s) in your household.
- If your legal parent is married, select “Married or remarried.” If you’re legal parents are divorced but living together, select “Unmarried and both parents living together.” If you’re legal parents are separated but living together, select “Married or remarried,” not “Divorced or separated.”
- If your legal parent is divorced or separated, answer the questions about the parent you lived with 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 (30/70), list information for the parent that provided at least 51% (30% or more) of your support for the year. If this parent is remarried as of today, answer the questions about that parent and your step parent.
- If your widowed parent is remarried as of today, answer the questions about that parent and your step parent.
- If your widowed parent is remarried as of today, answer the questions about that parent and your step parent.

Question 42: Enter the Month and Year of your parent’s marital status selected in question 41. If your parents have never been married, remarried, separated, divorced or widowed, mark “Not applicable.”

Question 43-46: Enter all the information for Parent 1 and Parent 2 (if applicable).

Step Four: Income Information

Notes for questions 57 and 58 (page 3)

Notes for questions 62 and 63 (page 3)

Question 57 and 62: Indicate whether you, your spouse, and/or your parent(s) worked anytime from January 1, 2017 through December 31, 2017.

Question 58 and 63: Enter 2017 earnings (wages, salaries, tips, etc.), even if a tax return was not filed. This information may be on the Form W-2 forms or on the tax return: 1040EZ—Line 3, 1040A—Line 9, or 1040—Lines 7 + 10 + 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 proceeding your TASFA. Tax filing requirements can be found in IRS Publication 17, Table 1-1. Filing requirements for non-taxpayers. See http://www.irs.gov/uac/About-Publication-17.

Non-tax filers: If you (and your spouse) and/or your parent(s) did not meet either of the IRS income filing thresholds, you will not be required to file taxes for state financial aid purposes. However, you will need to provide a breakdown of your living expenses and explain the sources of income that you used to pay for those expenses. (See PART F. NON-TAX FILERS)

Notes for question 59 and 60 (page 3)

Notes for question 64 (page 3)

Question 59 and 64: Indicate whether you, your spouse, and/or your parent(s) have completed a federal or foreign tax return for 2017. If “Yes,” you will be required to submit documents to your financial aid office [e.g., tax returns, tax transcripts, W-2s].

Tax ID Numbers: Enter tax ID number(s) for you, your spouse, and/or your parent(s) if they were used to complete the 2017 tax return.

Question 60 and 61: Enter an individual’s taxpayer identification number (ITIN) for you, your spouse, and/or your parent(s), if used to file a 2017 tax return.

Note: Mark N/A if an ITIN was not used to file a 2017 tax return.

Notes for question 61 (page 3)

Notes for question 66 (page 3)

In general, a person may be considered a displaced 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), it is no longer supported by the spouse, is unemployed or underemployed, and is having trouble finding or upgrading employment.
PART B. 2017 UNTAXED INCOME

Notes for questions:
67-70 (page 4)

Question 67. Report child support that you, your spouse, or your parent(s), as applicable, received for all children during 2017. Do not include foster care or adoption payments.

Question 68. Report housing, food and other allowable payments paid to members of the military, clergy and others (including cash payments and cash value of benefits). Don’t include the value of on-base military housing or the value of a basic military allowance for housing or rental subsidies for low-income housing.

Question 69. Enter the total amount of untaxed income. Do not include student aid, earned income credit, child tax credit, untaxed Social Security benefits, Workforce Investment Act educational benefits, combat pay (if you are not a tax filer), benefits from flexible spending arrangements (e.g. careera plans), foreign income exclusion, or credit for federal tax on special fees.

Examples of untaxed income:
- Payments to tax-deferred pension and retirement savings
- IRA contributions and payments other qualified plans
- Tax exempt interest income
- Untaxed portions of IRA distributions
- Untaxed portions of pensions
- Veterans non-education benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances
- Other untaxed income not reported may include workers’ compensation, disability benefits, etc.

Question 70. Enter money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form.

PART C. 2017 ADDITIONAL FINANCIAL INFORMATION

Notes for questions:
72-74 (page 4)

Question 72. Report any child support payments paid by you, your spouse, or your parent(s), as applicable, during 2017 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 you or your parent(s) household.

Question 73. Report earnings from road-based work programs and need-based employment portions of fellowships and assistantships.

Question 74. Report any student grant and scholarship aid that was reported to the IRS on you or your parent(s) 2017 Federal income tax return. This includes benefits such as awards, living allowances, and interest accrual payments as well as grants and scholarship portions of fellowships and assistantships.

PART D. 2017 ASSETS

Notes for questions
75-77 (page 4)

Question 75. Do not enter student financial aid awards in this amount.

Question 76. Net worth means current value minus debt. If net worth is negative, enter 0.

Question 77. 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.

STEP FIVE: HOUSEHOLD INFORMATION

Notes for questions
80-81 (page 5)

Question 80. List the members of your household. Include the following:
- Yourself, even if you live with your parents.
- Spouse (if applicable).
- Your children (even if they live outside your home and you will provide more than 50% of their financial support between July 1, 2019 and June 30, 2020).
- Other people that live with you and you will provide more than 50% of their financial support between July 1, 2019 and June 30, 2020. Parents (if applicable).
- Your parent(s) other children (even if they do not live with your parents and your parents will provide more than 50% of their financial support between July 1, 2019 and June 30, 2020).

Note: Do not include people in your household that you will not provide more than half of their support between July 1, 2019 and June 30, 2020 (e.g., roommate).

Question 81. Always count yourself as a college student. Do not include family members who are in the U.S. military service academies. Include the number of people in your household (from Question 80) that will be enrolled in a program that leads to a college degree or certificate, and will attend at least half-time between July 1, 2019 and June 30, 2020.