

# 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 ID 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 51.9095). 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.sss.gov](http://www.sss.gov). After a male reaches his 26<sup>th</sup> birthday, he can no longer register. Once submitted, a copy of your registration acknowledgement 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 requiring 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 could 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, remarried, 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 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](http://www.childwelfare.gov/nfcad).

#### 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 an emancipated minor or were an 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 or 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.

### Notes for question 38-40 (page 2)

Enter **"Yes"** if you received a determination at any time on or after July 1, 2018, that you were an unaccompanied youth who was homeless or, at risk for 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.

### 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 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 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 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 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 parents are divorced or separated, answer the questions about the parent you lived with more during the past 12 months. (If you did not live with one parent more than the other, give answers about the parent who provided more financial support during the past 12 months or 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 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.

**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 the all information for **Parent 1** and **Parent 2** (if applicable).

### STEP FOUR: INCOME INFORMATION

#### PART A. EARNINGS

#### Notes for question 57 and 58 (page 3)

#### Notes for question 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 W-2 forms or on the tax returns: 1040EZ—line 1, 1040A—line 7, or 1040—lines 7 + 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: 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 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. NONTAX FILERS**)

#### Notes for question 59 and 60 (page 3)

#### Notes for question 64 and 65 (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-2's).

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

**Question 60 and 65.** Enter an Individual 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 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. 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 living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). Don't include the value of on-base military housing or the value of a basic military allowance for housing or report rent 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. cafeteria plans), foreign income exclusion, or credit for federal tax on special fuels.

#### Examples of untaxed income:

- Payments to tax-deferred pension and retirement savings
- IRA deductions 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 need-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 grant 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 now 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.