

TASFA CHECKLIST

TASFA Application *(submit to the financial aid office for each college or university you apply to)*

The ID# you use should be your college or university ID#. When you apply to Houston Community College, you receive your ID# when you submit the application. Other colleges and universities mail your ID# to you after you have applied —generally two weeks. Remember, you can always call the college or university if you have not received your ID#.

The TASFA can be found at houstonisd.org/dreamers under “College Access Resources.”

Affidavit *(submit to Admissions Office or, if already submitted, check to see if received)*

The affidavit certifies that you are a Texas Resident for instate tuition and eligible for Texas financial aid. You must send each school you apply to an affidavit. You don't have to wait to be accepted to submit your affidavit. If you have already submitted your affidavit, check with the Admissions Office to make sure it has been processed. If you are just now submitting, check with the Admissions Office two to four weeks after submitting it.

Selective Service Card *(males only – 18 or older)*

The selective service card can be found at <https://bit.ly/2MAuozc>.

Fill out the card in black ink and capitalize all letters. Your address must contain the street number and the name of the street. If you live in an apartment, print the letters APT, and write the number. For example, 1531 WESTBURY STREET APT 45. Make a copy of the application card. Submit a copy for each TASFA you send out. In 4 to 6 weeks, you will receive a letter from the Selective Service with your selective service number. You will submit a copy of this letter to the financial aid office.

If you are not 18, you should send the letter the day you turn 18. If you do not receive your letter in six weeks, call 847-688-6888 or toll-free 1-888-655-1825.

TAX Return Transcript *(your parents and yours if you filed your own taxes)*

Once your parents have submitted their income tax return, they will need to request a tax return transcript from the IRS. Please follow the steps on page 2 to request the IRS tax transcript.

Verification Worksheet *(dependent and independent)*

College and universities require TASFA students to complete what is called a “Verification Worksheet.” The worksheet asks basically the same questions as the TASFA. Since each college creates its verification worksheets, you will need to visit the college’s financial aid webpage. Look for the section called FINANCIAL AID FORMS. Below are links to Houston colleges’ financial aid website:

HCCS: <http://bit.ly/HCC-TASFA>

UHD: <http://bit.ly/UHD-TASFA>

UH: <https://bit.ly/UH-eTASFA> (UH TASFA requirements: <https://bit.ly/2OW50fe>)

TSU: <http://bit.ly/TSU-TASFA>

Submit your final semester transcript to the Office of Admission *(Spring Semester)*

Make sure your final transcript has your GPA and rank on it.

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Verification: Ordering Tax Return Transcript (TASFA):

Option 1: Order Online (*Creating an account allows you and your parents to get the transcript online immediately. However, to create an account, the IRS will verify a person's identity using a financial account such as credit card, student loan, mortgage, auto loan, etc.*)

- Go to www.irs.gov
- Click [Get Your Tax Record] & click [Get Transcript Online].
- Under Sign Up, click [CREATE ACCOUNT]
- Complete **Step 1** of Personal Information: click [SEND CODE] and log into your email account and retrieve confirmation code.
- Enter your Confirmation Code and click [CONTINUE]
- Complete **Step 2** of Personal Information: Enter your personal information and click [CONTINUE].
 - Look on your IRS 1040 Tax Return form to check your Filing Status (this must match)
 - Street address must be the exact way you spelled it on Address Line 1 on your 1040.
- Complete **Step 3** of Personal Information: click the account number you would like to verify from the options listed. Enter the appropriate information. (If you or your parents cannot verify your identify with the listed option, please review Option 2 & 3 below.)
- Complete Steps 4 & 5:
 - Once you have completed your profile click [continue] and select a reason you need a return transcript: [*Higher Education/Student Aid*]
 - On the screen "Get Transcript," select 2020 under [*Return Transcript*]. You may have to unblock pop-ups.

Option 2: Order by Phone

- Verify and confirm the mailing address and social security information.
- Request a 2020 tax return transcript.

Option 3: Order by Mail (*If you or your parents do NOT have a financial account such as credit card, student loan, mortgage, auto loan to verify your identity, AND you live at the same address that your parents' used when they filed the 2020 taxes, use this option.*)

- Go to www.irs.gov
 - Click [Get Transcript by Mail] & click [Ok].
 - Enter information exactly as it appears on the 1040 tax form and click [CONTINUE]
 - Select [*return transcript*] and [*2020 tax transcript year*]
 - Click [CONTINUE] and [EXIT]
- * The IRS Tax Return Transcript will be mailed to the address on file between 5-10 days after the date of request*

If you encounter problems, **please visit your closest IRS Office.** A list of offices can be found on page 3.

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OPTION 4: Go to an IRS Office

- Determine which IRS office is closest to you
- Call 844-545-5640 to make an appointment
- Visit the IRS tax office and request a 2020 Tax Return Transcript.

Houston (Downtown)	1919 Smith St. Houston, TX 77002	Monday - Friday 8:30 a.m. – 4:30 pm.	Office Information 281-721-7021
Houston (Northwest)	12941 I-45 North Houston, TX 77060	Monday - Friday 8:30 a.m. – 4:30 pm.	Office Information 713-209-5499
Houston (Southeast)	8876 Gulf Freeway Houston, TX 77017	Monday - Friday 8:30 a.m. – 4:30 pm.	Office Information 281-721-7021
Houston (Southwest)	8701 South Gessner Houston, TX 77074	Monday - Friday 8:30 a.m. – 4:30 pm.	Office Information 281-721-7021

I've submitted my TASFA application, now what?

- **Login to ALL the portals for EACH college you have applied to and check missing/incomplete items.**
- Each college is different, so you may need to check different tabs, links, etc. to find what you are missing to receive your financial aid package. When in doubt, call the office of financial aid for each college to get an update on your package status.
- Be sure to take a photo or scan the tax transcripts and non-filer verifications you receive from the IRS because you will probably need to submit them to each college.

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Frequently Asked Questions (TASFA):

I have my TASFA completed, my parents' income tax, and a copy of my selective service card, but my college has NOT loaded the 2022-2023 verification worksheet. What should I do?

Go ahead and submit your TASFA application with parents' income tax return and a copy of your selective service card if a male. Keep checking the financial aid websites of the colleges you applied to for the 2022-2023 verification sheet. Once you see it's been uploaded, copy it, complete it, and immediately turn it in.

I've turned in my TASFA and all supporting documents. Now what?

Give your college about two weeks to start processing your application. Log into your student account and check your financial aid status. Your student account is your one-stop-shop for everything. Generally, you'll register for classes, communicate via campus email, receive financial aid status updates, and pay for your classes through your student account. So take an afternoon and get familiar with it.

If you see no activity in your financial aid account, you should contact the financial aid office directly. Be polite. Ask if they have received your TASFA and if they have any questions. Then ask when you can expect to be awarded your financial aid. Don't be surprised if they tell you in late summer.

The trick is to call every few weeks with questions. Stop by the office as well. Get to know the person who oversees the Texas Grant by name. Tell them your story — why you need the funds and your dream to attend college and ask them questions. Processing a TASFA requires a little more of their attention than a FAFSA, so if you have them thinking "Hey, this kid really wants to attend college," they are more likely to remember that when they pull your TASFA from a large stack of them.

Also, document in a notebook every time you make a call or visit. What did you do, what was promised you, and what follow up steps will be needed? Personally, I've had kids march into a financial aid office in October with long email trails and copious notes about all of their visits to financial aid. These students get results.

Why does it take so long for a college to award me the Texas Grant?

First, the State of Texas does not award Texas Grant funds to colleges until mid-summer. Since colleges are never sure how much Texas Grant funding they will receive until so close to the start of the school year, they are hesitant to tell you that you will receive the Texas Grant until they know they have funds to give you.

*Second, a large university or community college will process thousands of FAFSA & TASFA's over the summer. They have small staffs, and they often struggle to award the FAFSA students by the time classes start. Unfortunately, TASFA students often have to wait until funding has arrived, which is right when the financial aid office is generally the busiest. The keywords are **patience** and **persistence**.*

So you need a backup plan. UH allows you to take an emergency loan. HCCS allows you to set up a payment plan. You'll want to investigate in the summer all of your options for holding classes if your Texas Grant doesn't arrive until late August or early September.

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I applied to several universities, and I am still waiting to see if I've been accepted. Should I wait to submit my TASFA?

If you have applied to a university, they have a record of your application on file. If you submit your TASFA, they will not be able to process it until you have been accepted, but they can stamp the date it arrived in their office. You might write a cover letter to let the university financial aid office know that you are waiting for your acceptance letter, but you wanted to get your TASFA in early since you would like to meet the school's priority deadline.

After you have been accepted, make sure to check back with the financial aid office. Let them know you have been accepted and ask when you can expect your TASFA to be processed and your financial aid awarded.

My parents do not want to complete an income tax return. What should I do?

Again, ask the financial aid officer at your college what to do in this situation. Often, they will tell you to get a letter from your parents' employer stating how much they were paid. Some employers don't have a problem with this. It's a simple statement saying that they paid your mother or father X dollars each month last year for Y work. However, some employers feel uncomfortable doing this. At that point, you will need to talk with your parents again about filing an income tax return as an independent contractor.

My parents live overseas, and they do not complete an income tax return.

Always ask the financial aid office first what they suggest. Most likely they will give you one of the solutions listed below.

Have your parents submit a letter stating that in their country they do not file an income tax return. They can email this to you, and you can translate it. The school may require that you submit a letter from your counselor or a relative.

*If you have no contact with your parents or have had very limited contact with them for the last two years, you can apply for what is called a "**dependency override**." You must provide the college a very compelling reason for not giving them any information about your parents' income. Generally, you will need to supply three letters explaining your situation. Often a high school counselor, a teacher, and a relative are good folks to ask for this.*

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My uncle puts me on his income tax return. Can I use that instead of my parents' tax?

No, you must supply income information about your parents. See above for details about supplying parent income information. The State of Texas is very strict about its requirement that students supply INCOME information about their parents. If your parents are not supporting you, then ask your parents to write a letter or send an email to you stating this. Your uncle or aunt can also write a letter stating that he or she is supporting you. Again, let the college financial aid office tell you how to do this. Don't try to do it on your own. Often financial aid officers have a slightly different way of wanting this information. Since they will be the ones reviewing your documentation, it is BEST to start with them!

If you get frustrated, and feel the financial aid officer is asking something impossible from you, politely let them know that and ask (again, politely) what else you can bring in. It's okay to say, "Well, can my counselor write a letter stating this? My counselor has known me for four years, and we are very close."

How do I receive my Texas Grant funds?

The college will deposit the funds into your student account. If you receive funds over and above what your classes and books cost, you can use the extra funds for living expenses or to pay a little toward a computer or other device.

How many classes do I need to take each semester?

*For the Texas Grant, you **MUST BE A FULL TIME STUDENT**. That means you must register for four to five classes a semester. Less than three classes, and you will be three-quarter time and will not qualify for the Texas Grant. There is a way to take three classes in the fall, three in the spring, and two in the summer (eight total), but you must clear this first with financial aid.*

What about my second year in college?

First, you'll need to submit your TASFA again. But this time it will be easier since you already know the drill.

Second, it's easier to get money your second year! If you receive money the first year, you are first in line to get money the second year. If you didn't receive funds, your TASFA will generally take top preference, since you'll be submitting it early and have already graduated from high school.

I'm attending Houston Community College. Any special instructions for me?

Yes. The HCCS financial aid office requires that you submit a final transcript to them. They can be very strict about this, so make sure you ask them directly about this requirement.

Can I take out a loan?

Yes, if you have a relative who has a social security number. For more information, go to www.collegeforalltexas.com