

TASFA TRAINING

Completing the Texas Application for State Aid

What is the TASFA?

An application used by financial aid administrators at most Texas colleges and universities to determine a student's eligibility for state financial aid

Objectives

- Gain understanding about completing the TASFA
- Discuss answers to frequently asked questions
- Discover resources to help students

Texas in-state tuition law

- H.B. 1403 passed in 2001 by Texas Legislature
- S.B. 1528 updated law in 2005
 - State law classifies eligible students as Texas residents for purposes of paying tuition.
 - Eligible for **state financial aid** at Texas colleges & universities.

Requirements for in-state tuition

- Graduate from high school/receive a GED in TX
- Reside in TX for at least three consecutive years before graduation or receiving GED
- Reside in TX for at least one year leading up to college enrollment
- Sign a notarized Affidavit of Intent
 - During admissions

Scenario #1 - Maria



My family and I came to Laredo, TX from Monterrey, Mexico when I was 8 years old. I went to school in Laredo until the end of the 9th grade. We then moved to Austin, where I started the 10th grade. I will graduate in May 2020.

"Will I qualify for in-state tuition?"

Scenario #2 - Ricardo



I have lived in Texas since April 2017. I was in an accelerated program and graduated high school June 2019.

"Do I qualify for in-state tuition?"

Scenario #3 – Jacob



I came from Jamaica to the United States. I have lived in Texas since I was 5 years old. I graduated high school in June 2018.

Beginning summer 2018, I went to live with my aunt in Florida to save money for college. I returned to Texas after a year to start college in fall 2019.

"Do I qualify for in-state tuition?"

TASFA Timeline for 2020-2021

September – December (fall of senior year)

- Apply for admission
- Fulfill residency requirements set by S.B. 1528
 (e.g. complete affidavit notarize)
- Register with Selective Service (males)

October

- Verify college accepts the TASFA
- Complete the TASFA
 - Make copies
 - Original signature
- Mail TASFA directly to the colleges' financial aid office
- Follow up with the colleges

State aid programs for which TASFA applicants may be eligible

- TEXAS Grant
- Texas Public Education Grant (TPEG)
- Texas Equalization Grant (TEG)
- Texas Educational Opportunity Grant (TEOG)
- State exemption programs
- Texas College Work-Study Program
 - students with work permit

Limited options

- Federal aid is not available federal aid includes federal student loans, grants, and work-study
- College Access Loan (CAL) is a state loan that requires a <u>cosigner</u> who is a permanent resident or U.S. citizen. The student's immigration status is not considered
- Scholarships*
 - May require FAFSA
 - May have to demonstrate financial need (EFC)
 - May require a social security number

^{*}ask questions

APPLICATION PROCESS

TASFA

- Section one: Student information
- Section two: Student dependency status determination
- Section three: Parent information
- Section four: Income information (student and parent)
- Section five: Household information
- Section six: Signature

The 2020 – 2021 TASFA

2020-21 TASFA

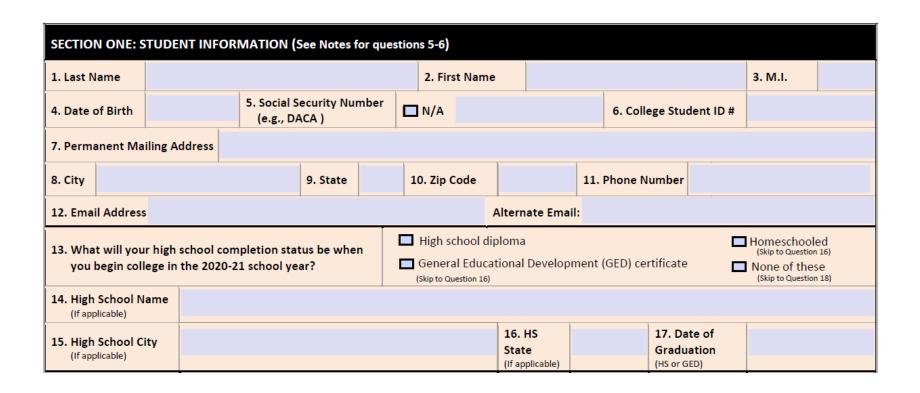
Texas Application for State Financial Aid

July 1, 2020 - June 30, 2021

The Texas Application for State Financial Aid (TASFA) 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 www.fafsa.ed.gov or visit the financial aid office at the institution you plan to attend for the 2020-21 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 Texas state priority deadline for many institutions of higher education is **January 15, 2020** for the 2020-21 award year. It is recommended that applicants complete and submit this application and any other required documentation to the financial aid office on or before January 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 the applicable sections. For clarification on specific items, refer to the TASFA Notes on pages 6-8. If you have further questions, contact the financial aid office at your institution.



18. Will you have your first bachelor's degree before you begin the 2020-21 school year? The No					
19. What will your college grade level be when you begin the 2020-21 school year?	20. What degree or certificate will you be working on when you begin the 2020-21 school year?				
Never attended college	1st bachelor's degree				
2nd year undergraduate/sophomore	Associate degree				
3rd year undergraduate/junior	Certificate or diploma				
4th year undergraduate/senior	Teaching credential				
5th year/other undergraduate	Graduate or professional degree				
1st year graduate/professional	Other/undecided				
Continuing graduate/professional or beyond					

STUDENT INFORMATION CONTINUED (See Notes for questions 24-29)	
21. Where do you plan to live during the 2020-21 school year? On-campus Off-campus With parent or relative 22. At the start of the 2020-21 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?	 25. Have you been convicted of a felony or a crime involving a controlled substance? Yes No No 26. Have you previously received state Financial Aid? Yes No 27. (A) Are you interested in being considered for the Texas College Work-Study program? Yes No Don't know
Yes (Enter date you earned Associate Degree: No 24. Were you born male or female? Male (Must complete the following Selective Service section) Female	(B) If yes, do you have authorization to work in the U.S.? Yes No Don't know N/A 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 Male students must verify their current Selective Service registration status by marking one of the statements below and providing proof of their registration status to their current institution. Failure to do so may result in the loss of eligibility for state financial aid.				
I am under the age of 18 and not currently required to register.				
□ I am REGISTERED with the Selective Service and, Check the following box that applies: □ I have already submitted proof of registration to my current institution. □ Proof of registration is included with this application. □ I will submit proof of my registration. NOTE: Proof is required to be considered eligible for financial aid.	I am EXEMPT from registration and, Check the following box that applies: I have already submitted proof of my exemption to my current institution. Proof of my exemption is included with this application. I will submit proof of my exemption. NOTE: Proof is required to be considered eligible for financial aid.			
I am over the age of 18. I am not registered with Selective Service and I am not exempt from registration with Selective Service.				

Section two: Student Dependency Status Determination

SEC	TION TWO: STUDENT DEPENDENCY STATUS DETERMINATION (See Notes for questions 30 and 35-40)		
30.	Were you born before January 1, 1997?	☐ Yes	■ No
31.	As of today, are you married? (Answer Yes if you are separated but not divorced.)	■ Yes	■ No
32.	At the beginning of the 2020-21 school year, will you be working on a master's or doctorate program?	■ Yes	■ No
33.	Do you now have or will you have children who will receive more than half of their support from you between July 1, 2020 and June 30, 2021?	☐ Yes	■ 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, 2021?	■ Yes	■ 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 parents deceased? (You do not have to currently be a ward of the court.)	■ Yes	■ No
36.	As determined by the state's court, are you or were you an emancipated minor?	■ Yes	■ No
37.	As determined by the state's court, does someone other than your parent or stepparent have legal guardianship of you?	☐ Yes	■ No
38.	At any time on or after July 1, 2019, 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?	□ Yes	■ No
39.	At any time on or after July 1, 2019, 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?	□ Yes	■ No
40.	At any time on or after July 1, 2019, 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?	□ Yes	■ No

Section three: Parent Information

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.						
	•	or are not married to each ot married or is remarried, divo	_			•
PARENT MARITAI	L STATUS					
■ Married or Rem ■ Divorced or Sep	41. As of today, what is the marital status of your legal parents? Married or Remarried Never Married Divorced or Separated Widowed Widowed Month: Year: N/A					
PARENT 1 (Mothe	er/Father/Stepparent)					
43. Last Name			44. First Name			
45. Date of Birth		46. Social Security Number (e.g., DACA)	Pr □ N/A		47. Phone Number	
48. Email Address						
49. Highest level of education completed.						
PARENT 2 (Mother/Father/Stepparent)						
50. Last Name			51. First Name			
52. Date of Birth		53. Social Security Number (e.g., DACA)	Pr □ N/A		54. Phone Number	
55. Email Address						
56. Highest level of	education completed.	■ Middle School/Jr. High	High School	College or Beyo	ond 🗖 Other/U	Jnknown

Section four: Income Information Part A

SECTION FOUR: INCOME INFORMATION Documentation will need to be submitted to the financial aid office. (e.g., W-2s)					
STOP: If you answered "Yes" to any of the questions in SECTION TWO, parental information is not required. You are only required to enter income information for yourself (and your spouse). 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 57-66)					
Student Earnings	Parent Earnings				
57. Did you (or spouse) work in 2018? Yes No	62. Did your parent(s) work in 2018?				
58. If yes, how much did you (and spouse) earn from working in 2018?	63. If yes, how much did your parent(s) earn from working in 2018?				
Student: Spouse:	Parent 1: Parent 2:				
59. Did you (or spouse) file a 2018 tax return?	64. Did your parent(s) file a 2018 tax return?				
Student Yes No	Parent 1 Tyes No				
Spouse Yes No	Parent 2 Yes No				
60. Was an Individual Taxpayer Identification Number (ITIN) used to file a 2018 tax return? If so, enter below or mark N/A.	65. Was an Individual Taxpayer Identification Number (ITIN) used to file a 2018 tax return? If so, enter below or mark N/A.				
Student: N/A	Parent 1:				
Spouse: N/A	Parent 2:				
61. As of today, are you (or spouse) a dislocated worker (currently unemployed)?	66. As of today, is either parent a dislocated worker (currently un- employed)?				
Student Yes No Don't know	Parent 1 Tes No Don't know				
Spouse Yes No Don't know	Parent 2 Yes No Don't know				

Filing taxes: IRS 2018 income thresholds

Table 1. 2018 Filing Requirements Chart for Most Taxpayers

IF your filing status is	AND at the end of 2018 you were	THEN file a return if your gross income was at least"
single	under 65	\$12,000
	65 or older	\$13,600
head of household	under 65	\$18,000
	65 or older	\$19,600
married, filing jointly***	under 65 (both spouses)	\$24,000
	65 or older (one spouse)	\$25,300
	65 or older (both spouses)	\$26,600
married, filing separately	any age	\$5
qualifying widow(er)	under 65	\$24,000
	65 or older	\$25,300

Step four: Income Information Parts B, C, and D

For questions 67-78, 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. 2018 UNTAXED INCOME (See Notes for questions 67-71)				
67. Child support received for any of your children.				
68. Housing, food, and other living allowances paid to members of the military, clergy, and others.				
69. Other untaxed income not reported. (Such as worker's compensation, disability, veterans noneducation benefits, etc.)				
70. Cash earnings. (Income not reported on taxes or W-2 forms)				
71. Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form.			N/A	N/A
72. TOTAL UNTAXED INCOME (Automatically calculates if completed electronically.)	\$ 0.00		\$ 0.00	
PART C. 2018 ADDITIONAL FINANCIAL INFORMATION (See Notes for q	uestions 73-75)			
73. Child support paid.				
74. Taxable earnings from work-study or other need-based work programs.				
75. Earnings from work under a cooperative education program offered by a college.				
PART D. 2018 ASSETS (See Notes for questions 76-78)				
76. As of today, what is your total current balance of cash, savings, and checking accounts?				
77. As of today, what is your net worth of investments, including real estate?				
78. As of today, what is your net worth of current businesses and/or investment farms?				

Step four: Income Information Part E

PART E. FEDERAL ASSISTANCE PROGRAMS						
79. At any time during 2018 or 2019, 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 mar	Mark all that apply or mark N/A.					
Medicaid or Supplemental Security Income (SSI)	Supplemental Nutrition Assistance Program (SNAP)	Free or Reduced- Price School Lunch	Temporary Assistance for Needy Families (TANF)	Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)		
□ N/A	□ N/A	■N/A	■ N/A	□N/A		

Section five: Household Information

SECTION FIVE: HOUSEHOLD INFORMATION

If you answered "Yes" to any of the questions in SECTION TWO, follow these instructions to complete the table below.

- Total number in household: Include yourself (and spouse) and your children if you will provide more than half of their support between July 1, 2020 and June 30, 2021 (even if they do not live with you). Include any other people if they now live with you, and you provide and will continue to provide more than half of their support between July 1, 2020 and June 30, 2021.
- Total number in college for 2020-21: Always count yourself as a college student. Do not include family members who are in U.S. military service academies. Include others only if they will attend, at least half-time in 2020-21, a program that leads to a college degree or certificate.

If you answered "No" to all the questions in SECTION TWO, follow these instructions to complete the table below.

- Total number in household: Include yourself (even if you don't live with your parents), your parents, and your parents' other children (even if
 they do not live with your parents) if your parents will provide more than half of their support between July 1, 2020 and June 30, 2021. Include
 any other people if they now live with your parents, and your parents provide and will continue to provide more than half of their support
 between July 1, 2020 and June 30, 2021.
- Total number in college for 2020-21: Always count yourself as a college student. Do not include your parents. Do not include siblings who are in U.S. military service academies. You may include others only if they will attend, at least half-time in 2020-21, a program that leads to a college degree or certificate.

Full name of each household member (Examples: parent(s), sibling(s), grandparent, spouse)	Age	Relationship to student (e.g., sister, son)	College/University (If attending July 1, 2020 – June 30, 2021)
		Self	
80. Total number in household:	81. Total n	umber in college for 2020–21:	

Section six: Signature(s)

SECTION SIX: SIGNATURE(S) - Application must contain electronic or wet (physical) signature(s) only.					
82. I certify that I will use state student financial aid to pay only the cost of attending an institution of higher education, and that the information provided on this form is true, complete, and correct to the best of my knowledge. I understand that any false statements may void my eligibility for state financial aid. I also understand that the information provided on this form will be used only for evaluation of eligibility for state (or institutional) financial aid and that I may need to provide additional information for my school to determine eligibility.					
Student Signature		Date			
Parent Signature*		Date			
*Only required if all questions in SECTION TWO were answered "No." Mark which parent signed above. Parent 1 Parent 2					
Note: If you plan to submit your TASFA to multiple institutions, make copies of the completed form and sign each copy.					

Completing the TASFA

- 1. Apply for admission
- 2. Confirm eligibility for state aid
 - Admissions or registrar
- 3. Notarize Affidavit of Intent
- 4. Males register with Selective Service
- 5. Confirm college accepts the TASFA (paper FAFSA)
- 6. Confirm tax filing threshold

- 7. Inquire with college.
 Requirements may vary
 - Proof of income
 - IRS tax returns, W2s, tax transcript
 - Explanation of how met living expenses
 - Letters to support current situation
- 8. Complete, make copies, sign, and mail TASFAs
 - Other required documents
 - Registered receipt or certified mail
- 9. Follow up with college: 2-4 weeks

TASFA Notes

2020-21 TASFA Notes

Texas Application for State Financial Aid

July 1, 2020 - June 30, 2021

These notes provide clarification to various questions on the TASFA. The peach items indicate a student (and spouse) response is needed, and the purple items indicate a parent response is needed. If you need additional assistance, contact the institution's financial aid office that you currently attend or plan to attend for the 2020-21 award year.

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 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. Notes for question 27 (page 2)

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

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 (TEC, 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: Contact your current institution to confirm whether additional proof is required.
- If you marked I am REGISTERED with the Selective Service, and your current institution does not have proof of your registration on file: You must submit documentation to your current institution in order to be eligible for state financial aid.
- If you marked I am EXEMPT from registration, and your current institution does not have proof of your exemption on file: You must submit documentation to your current institution in order to be eligible for state financial aid.
- 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 (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)
- Work-Study Student Mentorship Program (WSMP)
- B-On-Time (BOT)

2020-21 Texas Application for State Financial Aid (TASFA) Notes

- College Access Loan (CAL)
- Texas Armed Services Scholarship Program (TASSP)
- · Bilingual Education Scholarship Program
- Exemptions

- 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

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, 1997, 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
- · 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.

FREQUENTLY ASKED QUESTIONS

Question 1:

If my parents don't file taxes and they get paid in cash, how do I report their income on the TASFA?

Question 2:

Do my parents or I need to file taxes if neither of us has a Social Security Number (SSN)?

Question 3:

I support my family (and have filed as head of household on my taxes). My parents do not work. Do I use my tax return to complete the TASFA?

Question 4:

One of my parents lives out of the country. Whose income do I report on the TASFA?

Question 5:

What if my father worked in 2018 but was laid-off this year and hasn't found work?

Do I still report his 2018 income?

Question 6:

Once the TASFA is complete, what do I do with the application?

Question 7:

If I have questions once I start filling out the TASFA, where can I call?

Resources

- AIE.org
 - Download application and instructions
 - Watch TASFA video (English and Spanish)
- Collegeforalltexans.com
 - THECB
 - Download application and instructions
- Texas Financial Aid Information Center
 - 1.888.311.8881

Discussion

To order additional copies, or to request permission to reproduce any of the information provided, please call TG Communications at (800) 252-9743.

