















### Notes for question 25 (page 2)

If you filed or will file a foreign tax return or IRS 1040NR, or a tax return with Puerto Rico, another U.S. territory (e.g., Guam, American Samoa, the U.S. Virgin Islands, Swain's Island, or the Northern Marianas Islands), or one of the Freely Associated States, use the information from that return to fill out this form. If you filed a foreign return, convert all monetary units to U.S. dollars using the published exchange rate in effect for the date nearest to today's date. To view the daily exchange rates, go to [federalreserve.gov/releases/h10/current](https://www.federalreserve.gov/releases/h10/current).

### Notes for question 26 (page 2)

If you filed or will file an IRS Form 1040 tax return, select your tax return filing status for 2022 from the "Filing Status" field:

- Single
- Head of household
- Married filing jointly
- Married filing separately
- Qualifying surviving spouse

The "Filing Status" field is located at the top of page one on IRS Form 1040.

### Notes for question 28 (page 2)

If you filed a 2022 tax return (or if married, you and your spouse filed a joint tax return), the AGI can be found on IRS Form 1040—Line 11.

**If you and your spouse filed separate tax returns**, calculate your total AGI by adding line 11 from both 2022 tax returns and entering the total amount.

If you or your spouse will file a federal tax return but haven't yet filed, estimate the amount that will appear in line 11 of your IRS Form 1040.

**If one of you filed a tax return and the other didn't and won't file**, add line 11 from your 2022 IRS Form 1040 to your spouse's 2022 income earned from working (for example, earnings from the W-2 form[s] and/or any other earning statements).

### Notes for question 29 (page 2)

This question cannot be left blank if you (and your spouse) filed or will file a 2022 income tax return.

Income tax paid can be found on your 2022 IRS Form 1040—line 22 minus Schedule 2—line 2. If negative, enter a zero.

**Note:** The line numbers above are from the Internal Revenue Service tax form, not from the W-2 form.

### Notes for question 30 (page 2)

Add the account balances of your (and your spouse's) cash, savings, and checking accounts as of today. Enter the total of all accounts as the total current balance. If the total is negative, enter zero as the total current balance.

Do not add student financial aid into your account balances. Round to the nearest dollar and do not include commas or decimal points.

### Notes for question 31 (page 2)

Net worth means the current value, as of today, of investments, businesses, and/or investment farms, minus debts related to those same investments, businesses, and/or investment farms. When calculating net worth, use 0 for investments or properties with a negative value.

**Investments include** real estate (do not include the home in which you live), rental property (includes a unit within a family home that has its own entrance, kitchen, and bath rented to someone other than a family member), trust funds, UGMA and UTMA accounts,

money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, installment and land sale contracts (including mortgages held), commodities, etc.

**Investments also include** qualified education benefits or education savings accounts such as Coverdell savings accounts, 529 college savings plans, and the refund value of 529 prepaid tuition plans. If the student is required to report parent information on the TASFA form, parents should not report the value of education savings accounts for other children. Qualified education benefits or education savings accounts must be reported as an asset of the parent if the student is required to report parent information. If the student is not required to report parent information on the TASFA form, the education benefit or savings account is reported as an asset of the student. UGMA and UTMA accounts are considered the assets of the student and must be reported as an asset of the student on the TASFA form, regardless of whether the student is required to report parent information.

**Investments do not include** the home you live in, the value of life insurance, ABLE accounts, retirement plans (401[k] plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.) or cash, savings, and checking accounts.

**Investments also do not include** UGMA and UTMA accounts for which you are the custodian but not the owner.

**Investment value** means the current balance or market value of these investments as of today. Investment debt means only those debts that are related to the investments.

### Notes for question 32 (page 2)

Enter the net worth (current value minus debt) of the current businesses and/or investment farms that you (and your spouse) own as of today.

**Businesses and investment farms include** businesses that you own (including a small or family-run business) or income-producing farms that you own (including the fair market value of land, buildings, livestock, unharvested crops, and machinery actively used in investment farms, agricultural, or commercial activities).

**Businesses and investment farms do not include** the value of crops that are grown solely for consumption by the student and their family or the home in which you live. If the home in which you live is also located on a farm that you own, do not include the net value of that principal residence in the net value of all farm assets. The principal residence may include the home, structures, and land that are adjacent to the home that are not being used, stored, or sold for farming or other commercial activities.

### Notes for question 33 (page 2)

Enter the total amount of child support you (and your spouse) received in 2022 for all children in your household.

- If you received the same dollar amount every month, multiply the amount by the number of months you received it. The result is the total annual amount.
- If you did not receive the same amount each month, add together the amounts you received each month. The result is the total annual amount.

**Note:** Do not include foster care or adoption payments.

### Notes for question 34 (page 2)

You will only have this information if you (or your spouse) submitted a 2022 federal tax return.

- If you and your spouse filed separate tax returns, add IRS Form 1040 Schedule 3—line 3 from both tax returns and enter the



total amount.

- If you or your spouse will file a federal tax return but haven't yet filed, estimate the amount that will appear in the lines noted above.

**Note:** The line number (IRS Form 1040 Schedule 3—line 3) is from the IRS tax form, not from the W-2 form.

#### Notes for question 35 (page 2)

Enter the total amount of grant and scholarship aid reported to the IRS as part of your (and your spouse's) adjusted gross income (AGI) for 2022.

This is student aid that was part of the student's (and your spouse's) financial aid package but was also considered taxable and included in the student's (and your spouse's) AGI. In most cases, grant and scholarship aid is not reported on the tax return as part of your AGI unless the amount you received exceeds your educational expenses (tuition, fees, books, supplies, or equipment). See IRS Publication 970.

Student aid types to report may include:

- Grants
- Scholarships
- Waivers/Remissions
- Fellowships/Assistantships (grant or scholarship portions)
- AmeriCorps education awards
- AmeriCorps living allowances (but not insurance or child care payments)
- AmeriCorps interest accrual payments (for student loan interest that accrued while you were in AmeriCorps)

#### Notes for question 36 (page 2)

Enter the amount of IRA deductions and payments to self-employed SEP, SIMPLE, Keogh, and other qualified plans that you (and your spouse) received in 2022. Round to the nearest dollar and do not include commas or decimal points.

**Note:** The line number references above are from the IRS tax form, not from the W-2 form.

#### Notes for question 37 (page 2)

Enter the total amount of tax-exempt interest income you (and your spouse) received in 2022. If you (and your spouse) filed IRS Form 1040, use line 2a.

**Note:** The line number references above are from the IRS tax form, not from the W-2 form.

#### Notes for Questions 38-41 (pages 2-3)

Enter the total amount of the untaxed income or portions you (and your spouse) received in 2022. If the total is a negative amount, enter a zero (0).

A rollover occurs when funds are moved from one eligible retirement plan to another. Example: moving funds from a 401(k) to a Rollover IRA. Check with the IRS for rollover guidance.

### SECTION TWO: STUDENT STATUS DETERMINATION

#### Notes for questions 44-56 (page 3)

Student Status questions help determine if you will need to give parental information on your TASFA. If you answer **yes** to **any** of the student status questions, you will **not** need to give parental information. If you answer **no** to **all of** the following student status questions, then **you will need** parental information and for your parent to sign your application.

#### Notes for question 44 (page 3)

If you were born on January 1, 2001, you should enter **"No."**

#### Notes for question 45 (page 3)

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 the institution you plan to attend.

#### Notes for question 47 (page 3)

Answer "Yes" if you are currently serving in the U.S. Armed Forces or are a National Guard or Reserves enlistee who is on active duty for other than state or training purposes.

Answer "No" if you are a National Guard or Reserves enlistee who is on active duty for state or training purposes.

#### Notes for question 48 (page 3)

Answer "No" (you are not a veteran) if you:

- have never engaged in active duty (including basic training) in the U.S. armed forces,
- are currently a Reserve Officers' Training Corps (ROTC) student or a cadet or midshipman at a service academy,
- are a National Guard or Reserves enlistee activated only for state or training purposes, or
- were engaged in active duty in the U.S. armed forces but released under dishonorable conditions.

Also answer "No" if you are currently serving in the U.S. armed forces and will continue to serve through June 30, 2025.

Answer "Yes" (you are a veteran) if you:

- have engaged in active duty (including basic training) in the U.S. armed forces or are a National Guard or Reserves enlistee who was called to active duty for other than state or training purposes, or were a cadet or midshipman at one of the service academies; and
- were released under a condition other than dishonorable. Also answer "Yes" if you are not a veteran now but will be one by June 30, 2025.

#### Notes for question 51 (page 3)

Answer "Yes" if at any time since you turned age 13:

- you had no living parent, even if you are now adopted; or
- you were in foster care, even if you are no longer in foster care today; or
- you were a dependent or ward of the court, even if you are no longer a dependent or ward of the court today. (Someone who is incarcerated is not considered a ward of the court.)

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

The financial aid administrator at your school may require you to provide proof that you were in foster care or a dependent or ward of the court.

#### Notes for questions 52 & 53 (page 3)

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.

An emancipated minor is someone who has been legally deemed an adult by a court in his or her state of residence.

Answer "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, answer "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 your

state. The court must be located in your state of legal residence at the time the court's decision was made.

Answer "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.

Note: 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 54-56 (page 3)

Answer "Yes" if you received a determination at any time on or after July 1, 2023, that you were an unaccompanied youth who was homeless or at risk of being homeless.

- "Homeless" means lacking fixed, regular, and adequate housing. You may be homeless if you are living in shelters, parks, motels, hotels, public spaces, camping grounds, cars, abandoned buildings, or temporarily living with other people because you have nowhere else to go. Also, if you are living in any of these situations and fleeing an abusive parent, you may be considered homeless even if your parent would otherwise provide a place to live.
- "Unaccompanied" means you are not living in the physical custody of your parent or guardian.

Answer "No" if you are not homeless or at risk of being homeless, or do not have a determination. However, even if you answer "No," you should contact the financial aid administrator at the college you plan to attend if you are either (1) homeless and unaccompanied or (2) at risk of being homeless, unaccompanied, and providing for your own living expenses, as your college financial aid office can determine that you are "homeless" and are not required to provide parental information.

The financial aid administrator at your college may require you to provide a copy of the determination if you answered "Yes" to any of these questions.

## SECTION THREE: PARENT INFORMATION

### Notes for questions 57-94 (pages 4-5)

If you answer no to all of the student status questions in Section 2, then **you will need** parental information and for your parent to sign your application.

Legal parents are biological or adoptive (regardless of gender), 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 the student.

**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:

- you have left home due to an abusive or threatening family environment;
- you were abandoned by or estranged from your parents;
- you have refugee or asylee status and are separated from your parents, or your parents are displaced in a foreign country;
- you are a victim of human trafficking;
- you are incarcerated, or your parents are incarcerated, and contact with the parents would pose a risk to you; or
- Are otherwise unable to contact or locate their parents.

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 a student aid index (SAI) calculated without parental data.

### Notes for question 57 (page 4)

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 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 legal 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 your legal parents are divorced but living together, select "Unmarried and both legal parents living together." If your legal parents are separated but living together, select "Married" or "Remarried," not "Divorced" or "Separated."
- If your parents are divorced or separated, answer the questions about the parent who provided more financial support during the past 12 months or during the most recent year that you actually received support from a parent. If both parents provided an exactly equal amount of financial support during the past 12 months, or if they don't support the student financially, answer the questions about the parent with the greater income and assets. 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.

### Notes for questions 62 and 69 (page 4)

If your parent has been issued a social security card, enter their assigned number. If your parent has been approved for Deferred Action for Childhood Arrivals (DACA), enter your assigned social security number (SSN) through this program. If your parent has an Individual Taxpayer Identification Number (ITIN), enter it.

### Notes for question 64 and 71 (page 4)

The email provided for your parent is very important that it be a regularly reviewed email account. Please make sure that the email is accurate.

### Notes for questions 65 and 72 (page 4)

Select the answer that best describes the highest level of education completed by your parent. Some financial aid is offered based on the level of schooling your parents completed.

### Notes for questions 73 and 74 (page 4)

Enter Parent 1 and Parent 2 (if applicable) 2022 earnings (wages, salaries, tips, etc.), even if a tax return was not filed. This information may be on W-2 forms or on Parent 1's tax return: IRS form 1040 (or 1040-NR): Line 1z + Schedule 1: lines 3 + 6.

If any individual earning item on these tax forms is negative, do not include that item in your calculation.

### Notes for question 75 (page 4)

If your parents are now married or living together, answer this question about them as a couple. If they are not married and not living together, answer this question about the parent who is

reporting financial information on this application.

If you indicate Parent "Will file" a 2022 tax return and your 2022 income is similar to your 2021 income, use your 2021 income tax return to provide estimates for questions about your income.

If your application is selected for review, your college may require you to provide tax transcripts to verify the information you provided on the application.

#### Notes for question 76 (page 4)

If your parent filed or will file a foreign tax return or IRS 1040NR, or a tax return with Puerto Rico, another U.S. territory (e.g., Guam, American Samoa, the U.S. Virgin Islands, Swain's Island, or the Northern Marianas Islands), or one of the Freely Associated States, use the information from that return to fill out this form. If your parent filed a foreign return, convert all monetary units to U.S. dollars, using the published exchange rate in effect for the date nearest to today's date. To view the daily exchange rates, go to [federalreserve.gov/releases/h10/current](https://www.federalreserve.gov/releases/h10/current).

#### Notes for question 77 (page 4)

If a parent filed or will file an IRS Form 1040 tax return, you must select the tax return filing status for 2022 from the "Filing Status" field:

- Single
- Head of household
- Married filing jointly
- Married filing separately
- Qualifying surviving spouse

The "Filing Status" field is located at the top of page one on IRS Form 1040.

#### Notes for question 79 (page 4)

If your parents filed a 2022 tax return, the AGI can be found on IRS Form 1040—Line 11.

**If your parents filed separate tax returns**, calculate the total AGI by adding line 11 from both 2022 tax returns and entering the total amount.

If your parents will file a federal tax return, but haven't yet filed, estimate the amount that will appear in line 11 of your IRS Form 1040.

**If one parent filed a tax return and the other didn't and won't file**, line 11 from the 2022 IRS Form 1040 to your other parent's 2022 income earned from working (for example, earnings from the W-2 form[s] and/or any other earning statements).

#### Notes for question 80 (page 4)

This question cannot be left blank if your parents filed or will file a 2022 income tax return.

Income tax paid can be found on your 2022 IRS Form 1040—line 22 minus Schedule 2—line 2. If negative, enter a zero.

**Note:** The line numbers above are from the Internal Revenue Service tax form, not from the W-2 form.

#### Notes for question 81 (page 5)

Add the account balances of your parents' cash, savings and checking accounts as of today. If the total is negative, enter zero as the total current balance. Round to the nearest dollar and do not include commas or decimal points.

#### Notes for question 82 (page 5)

Net worth means the current value, as of today, of investments, businesses, and/or investment farms minus debts related to those same investments, businesses, and/or investment farms. When

calculating net worth, use 0 for investments or properties with a negative value.

**Investments include** real estate (do not include the home in which you live), rental property (includes a unit within a family home that has its own entrance, kitchen, and bath rented to someone other than a family member), trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, installment and land sale contracts (including mortgages held), commodities, etc.

**Investments also include** qualified education benefits or education savings accounts such as Coverdell savings accounts, 529 college savings plans, and the refund value of 529 prepaid tuition plans. If the student is required to report parent information on the TASFA form, parents should not report the value of education savings accounts for other children. Qualified education benefits or education savings accounts must be reported as an asset of the parent if the student is required to report parent information. If the student is not required to report parent information on the TASFA form, the education benefit or savings account is reported as an asset of the student. UGMA and UTMA accounts are considered the assets of the student and must be reported as an asset of the student on the TASFA form, regardless of whether the student is required to report parent information.

**Investments do not include** the home you live in, the value of life insurance, ABLE accounts, retirement plans (401[k] plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.) or cash, savings, and checking accounts already reported.

**Investments also do not include** UGMA and UTMA accounts for which you are the custodian but not the owner.

Investment value means the current balance or market value of these investments as of today. Investment debt means only those debts that are related to the investments.

#### Notes for question 83 (page 5)

Enter the net worth (current value minus debt) of the current businesses and/or investment farms that your parents own as of today.

**Businesses and investment farms include** businesses that you own (including a small or family-run business) or income-producing farms that you own (including the fair market value of land, buildings, livestock, unharvested crops, and machinery actively used in investment farms, agricultural, or commercial activities).

**Businesses and investment farms do not include** the value of crops that are grown solely for consumption by the student and their family or the home in which you live. If the home in which you live is also located on a farm that you own, do not include the net value of that principal residence in the net value of all farm assets. The principal residence may include the home, structures, and land that are adjacent to the home that are not being used, stored, or sold for farming or other commercial activities.

#### Notes for question 84 (page 5)

Enter the total amount of child support your parents received in 2022 for all children in your household.

- If they received the same dollar amount every month, multiply the amount by the number of months they received it. The result is the total annual amount.
- If they did not receive the same amount each month, add together the amounts they received each month. The result is the total annual amount.

**Note:** Do not include foster care or adoption payments.

### Notes for question 85 (page 5)

Your parents will only have this information if a 2022 federal tax return was submitted.

- If your parents filed separate tax returns, add IRS Form 1040 Schedule 3—line 3 from both tax returns and enter the total amount.
- If one or both parents will file a federal tax return, but haven't yet filed, estimate the amount that will appear in the line noted above.

**Note:** The line number (IRS Form 1040 Schedule 3—line 3) is from the IRS tax form, not from the W-2 form.

### Notes for question 86 (page 5)

Enter the total amount of grant and scholarship aid reported to the IRS as part of your parents adjusted gross income (AGI) for 2022.

This is student aid that was also considered taxable and included in the parents' AGI. In most cases, grant and scholarship aid is not reported on the tax return as part of your AGI unless the amount you received exceeds your educational expenses (tuition, fees, books, supplies, or equipment). See IRS Publication 970 for more information.

Student aid types to report as part of the AGI may include:

- Grants
- Scholarships
- Waivers/Remissions
- Fellowships/Assistantships (grant or scholarship portions)
- AmeriCorps education awards
- AmeriCorps living allowances (but not insurance or child care payments)
- AmeriCorps interest accrual payments (for student loan interest that accrued during your AmeriCorps term of service).

### Notes for question 87 (page 5)

Enter the total amount of IRA deductions and payments to self-employed SEP, SIMPLE and Keogh your parents received in 2022. Round to the nearest dollar and do not include commas or decimal points.

**Note:** The line number references above are from the IRS tax form, not from the W-2 form.

### Notes for question 88 (page 5)

Enter the total amount of tax-exempt interest income your parents received in 2022.

If your parents filed a tax return: IRS Form 1040 - Use Line: 2a.

**Note:** The line number references above are from the IRS tax form, not from the W-2 form.

### Notes for question 89 92 (page 5)

Enter the total amount of the untaxed income or portions your parents received in 2022. If the total is a negative amount, enter a zero (0).

A rollover occurs when funds are moved from one eligible retirement plan to another. Example: moving funds from a 401(k) to a Rollover IRA. Check with the IRS for rollover guidance.

## Notes for Submitting a Paper Copy TASFA

Each institution may have a different process for receiving paper copy TASFAs. Some institutions may prefer that a paper copy TASFA is mailed directly to the Financial Aid Office and 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.

If you have filled out a paper copy of the TASFA, you do not need to fill out the online TASFA. You should do one or the other but not both.

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.

For more information on the TASFA and frequently asked questions, visit <https://www.highered.texas.gov/our-work/empowering-our-students/tasfa/>.