

State Financial Aid Monthly Webcast

September 27, 2022

Topics of Discussion



It's Official: THECB
has Moved!

State Campus-Based
Report Overview –
FY 2022

FAQs

TASFA Updates

Reminders, Updates,
and Deadlines

Questions?

It's Official: We Have Moved!

Downtown Austin

Our New Home

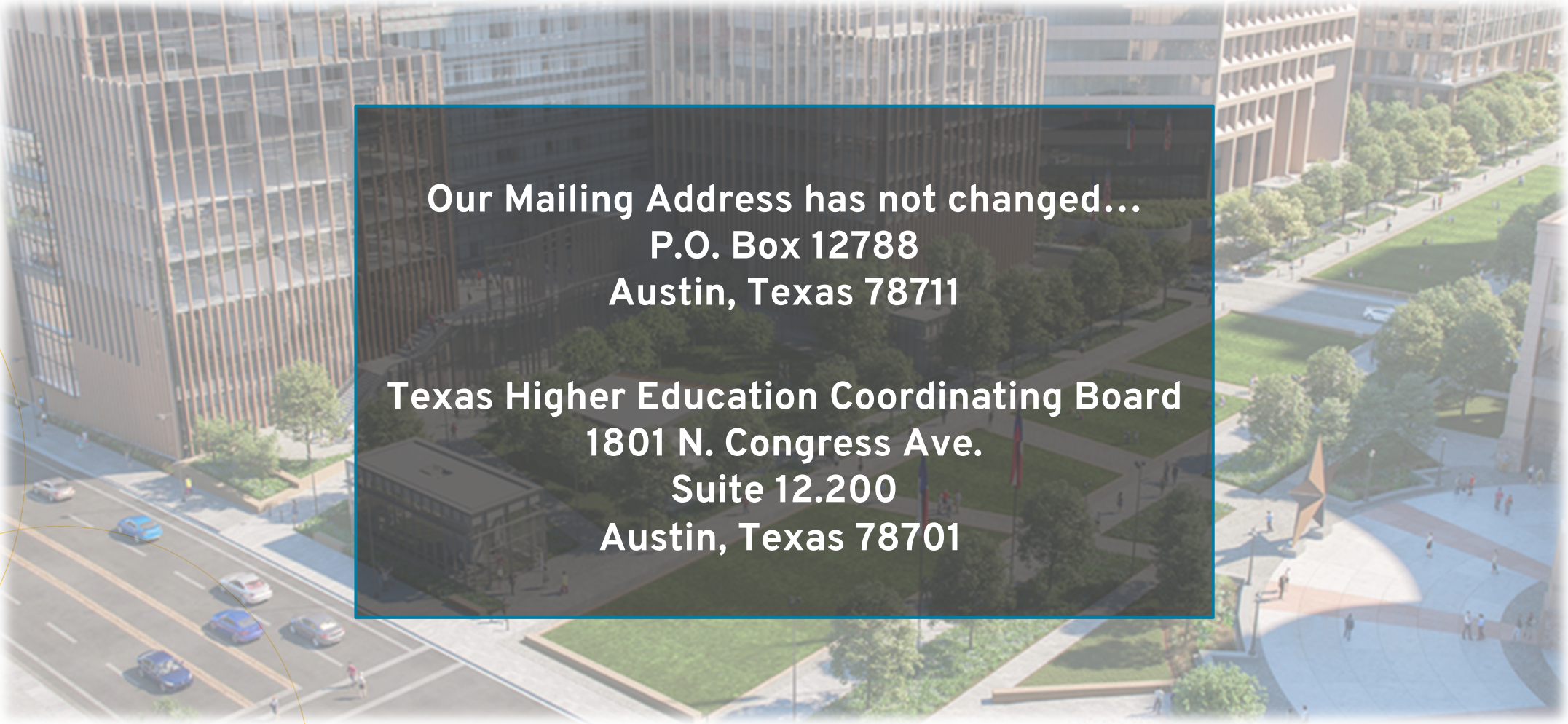


Our New Neighbors

- Texas Lottery Commission
- Department of Public Safety
- Behavioral Health Executive Council
- Board of Professional Geoscientists
- Texas Racing Commission
- State Board of Dental Examiners
- State Board of Veterinary Medical Examiners
- Texas Medical Board
- Executive Council of Physical Therapy & Occupation Therapy Examiners
- Texas Optometry Board
- Board of Chiropractic Examiners
- Texas Board of Nursing
- Texas Health Professionals Council
- Commission on State Emergency Communications
- Texas Department of Housing & Community Affairs – Manuf. Housing
- Funeral Services Commission
- State Board of Pharmacy
- Texas Juvenile Justice Department
- Texas Veterans Commission



Our New Physical Address



Our Mailing Address has not changed...
P.O. Box 12788
Austin, Texas 78711

Texas Higher Education Coordinating Board
1801 N. Congress Ave.
Suite 12.200
Austin, Texas 78701

State Campus-Based Report FY 2022

Overview

Report Information



- Please see memo dated 09/23/2022
- Annual Report PDF and Submission Form link are located on the SFAP webpage → Program Resources.
- Public institutions must submit a copy of their most recent TPEG Guidelines, marked with an “As of date.”
- To ensure your report can be processed by the THECB, please do not submit a scanned copy.
- Deadline to submit is **October 28, 2022.**

Collecting Information

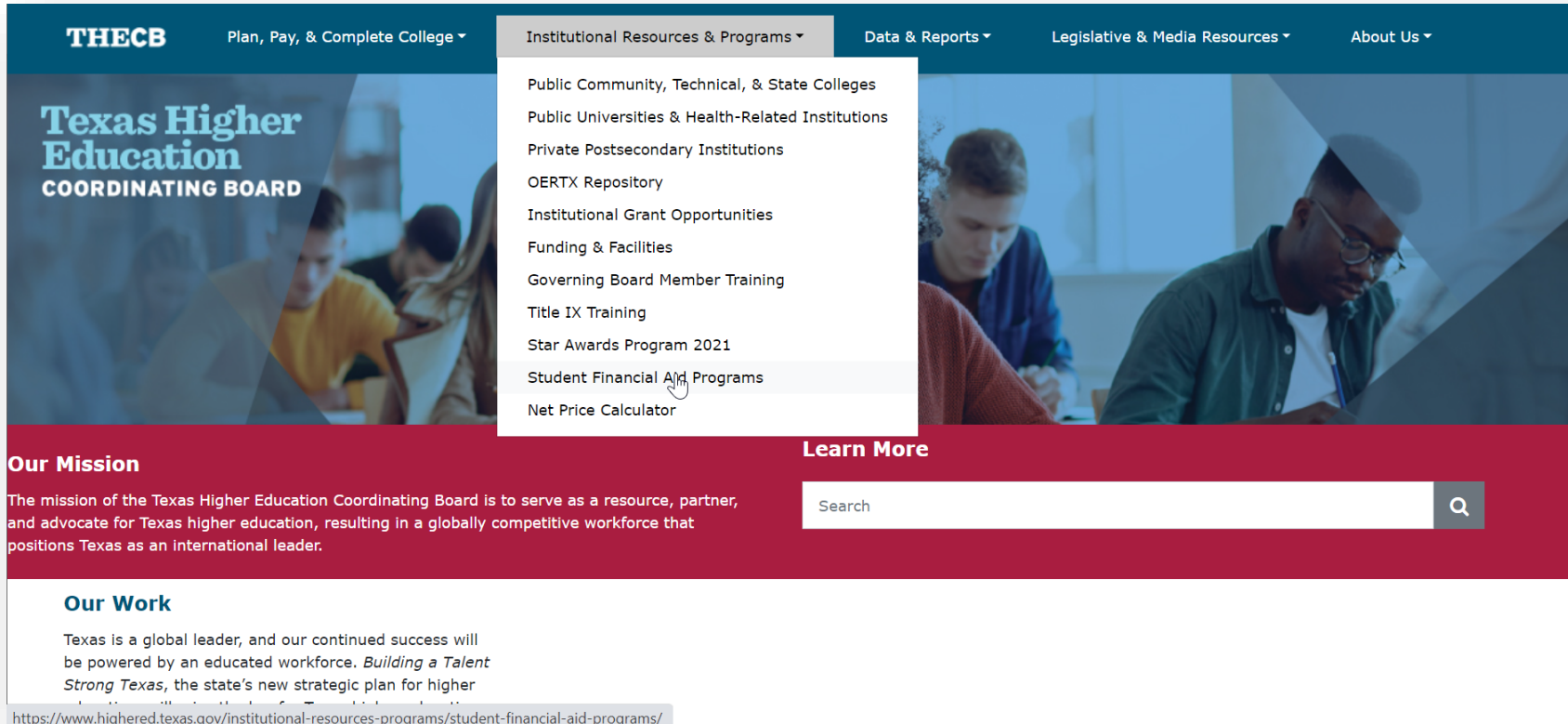
What's needed:

- Public and Private/Independent Institutions
 - License Plate Insignia (LPI)
- Public Institutions **ONLY**
 - Student Deposit Scholarship (SDS)
 - Texas Public Educational Grant (TPEG)
 - Emergency Loans

The image shows two overlapping forms for the 2021-22 (FY 2022) State Campus-Based Programs Annual Report. The top form is for Public and Private/Independent Institutions, and the bottom form is for Public Institutions Only. Both forms are from the Texas Higher Education Coordinating Board (THECB). The top form includes sections for Institutional Information, Section One (License Plate Insignia Scholarship Program), and Section Two (Student Deposit Scholarship Program). The bottom form includes sections for Section Two (Student Deposit Scholarship Program) and Section Three (Texas Public Educational Grant). Both forms have tables for reporting various amounts, such as LPI carry-forward balance, total amount of investment income, total amount of LPI funds awarded, and SDS carry-forward balance. The forms also include checkboxes for 'YES' and 'NO' responses and a section for contact information.

Form Walk-Through

Finding the Report



The screenshot shows the THECB website with a dark blue header. The navigation menu includes: THECB, Plan, Pay, & Complete College, Institutional Resources & Programs (highlighted), Data & Reports, Legislative & Media Resources, and About Us. A dropdown menu for 'Institutional Resources & Programs' is open, listing: Public Community, Technical, & State Colleges; Public Universities & Health-Related Institutions; Private Postsecondary Institutions; OERTX Repository; Institutional Grant Opportunities; Funding & Facilities; Governing Board Member Training; Title IX Training; Star Awards Program 2021; Student Financial Aid Programs (highlighted with a mouse cursor); and Net Price Calculator. The main content area has a red banner with 'Our Mission' and 'Learn More' sections. The 'Our Mission' section states: 'The mission of the Texas Higher Education Coordinating Board is to serve as a resource, partner, and advocate for Texas higher education, resulting in a globally competitive workforce that positions Texas as an international leader.' The 'Learn More' section has a search bar. Below the banner, the 'Our Work' section is visible, starting with 'Texas is a global leader, and our continued success will be powered by an educated workforce. Building a Talent Strong Texas, the state's new strategic plan for higher education...' and a URL: <https://www.highered.texas.gov/institutional-resources-programs/student-financial-aid-programs/>.

THECB Plan, Pay, & Complete College Institutional Resources & Programs Data & Reports Legislative & Media Resources About Us

Texas Higher Education COORDINATING BOARD

Public Community, Technical, & State Colleges
Public Universities & Health-Related Institutions
Private Postsecondary Institutions
OERTX Repository
Institutional Grant Opportunities
Funding & Facilities
Governing Board Member Training
Title IX Training
Star Awards Program 2021
Student Financial Aid Programs
Net Price Calculator

Our Mission

The mission of the Texas Higher Education Coordinating Board is to serve as a resource, partner, and advocate for Texas higher education, resulting in a globally competitive workforce that positions Texas as an international leader.

Learn More

Search

Our Work

Texas is a global leader, and our continued success will be powered by an educated workforce. *Building a Talent Strong Texas*, the state's new strategic plan for higher education...

<https://www.highered.texas.gov/institutional-resources-programs/student-financial-aid-programs/>

www.highered.texas.gov

Finding the Report (continued)

THECB

Plan, Pay, & Complete College

Institutional Resources & Programs

Data & Reports

Legislative & Media Resources

About Us

Search

Public Community, Technical, & State Colleges

Public Universities & Health-Related Institutions

Private Postsecondary Institutions

OERTX Repository

Institutional Grant Opportunities

Funding & Facilities

Governing Board Member Training

Title IX Training

Star Awards Program 2022

Student Financial Aid Programs

Stay Connected

Program Resources

Net Price Calculator

Student Financial Aid Programs

The Office of Student Financial Aid Programs (SFAP) supports institutions of higher education with the administration of state financial aid programs. We are committed to expanding financial aid knowledge through excellence in customer service, communication, and training for Texas students, borrowers, and institutions of higher education.

ALERT: 2023-2024 Texas Application for State Financial Aid (TASFA)

An announcement was sent to institutions on Aug. 28, 2022, providing [an update on the status of the Online TASFA](#).

Stay Connected

Access the [Institutional Calendar](#), subscribe to the [SFAP listserv](#), follow the [Financial Aid Advisory Committee](#), view an archive of the [Financial Aid Services](#) monthly webcast, and download [SFAP published memos](#).

Program Resources

Find information to assist with the administration of state grants, loans, work-study, scholarships, exemptions and waivers, tuition set asides, Selective Service Statement of Registration Status, and download the [Texas Application for State Financial Aid \(TASFA\)](#).

ALERT: THECB has moved to the Capitol Complex

The Texas Higher Education Coordinating Board (THECB) has moved to the new George H. W. Bush Building at the Texas Capitol Complex effective Sept. 19, 2022.

Our mailing address will remain the same. As a reminder, that address is:

Texas Higher Education Coordinating Board
PO Box 12788
Austin, TX 78711-2788

If you're planning to visit the agency, or need our physical address, you can find us at:

Texas Higher Education Coordinating Board
1801 N. Congress Ave. Suite 12.200
Austin, Texas 78701

Contact Information

Please send online inquiries through [CONTACT US](#) (select "Financial Aid Question" as the Contact Reason) and someone will respond as soon as possible.

Net Price Calculator (NPC)

- [State Net Price Calculator \(NPC\) Instructions](#)

CUSTOMER SATISFACTION SURVEY: Take a moment to provide feedback.

Finding the Report (continued)

THECB Plan, Pay, & Complete College Institutional Resources & Programs Data & Reports Legislative & Media Resources About Us Search

Public Community, Technical, & State Colleges

Public Universities & Health-Related Institutions

Private Postsecondary Institutions

OERTX Repository

Institutional Grant Opportunities

Funding & Facilities

Governing Board Member Training

Title IX Training

Star Awards Program 2022

Student Financial Aid Programs

Stay Connected

Program Resources

Exemptions and Waivers

Grant Programs

Loan Programs

Tuition Set-Asides

Work-Study & Scholarships

Net Price Calculator

Program Resources

Institutions can find information to assist with the administration of state financial aid programs through the following program resources:

Grant Programs

- Resources for state grant programs: Toward EXcellence, Access, and Success (TEXAS) Grant; Texas Educational Opportunity Grant (TEOG); Tuition Equalization Grant (TEG); Texas Transfer Grant Pilot Program; and Governor's Emergency Education Relief (GEER) State Grant.

Loan Programs

- Resources for low-interest loans available to Texas residents: College Access Loan (CAL) and Texas B-On-Time (BOT) Loan.

Work-Study & Scholarships

- Resources for Texas College Work-Study (TCWS) and the Work-Study Student Mentorship Program (WSMP); and information on the Bilingual Education Program, and the Texas Armed Services Scholarship Program (TASSP).

Exemptions and Waivers

- Resources for specific programs that may exempt or waive tuition and fees for certain individuals attending public institutions of higher education in Texas.

Tuition Set-Asides

- Information on Uniform Standards for Disclosing Designated Tuition Set-Aside Funds.
- Calculate Tuition Set-Aside Amounts.

Financial Aid Database (FAD) Report

The FAD Report is used to collect data for the Texas Higher Education Coordinating Board (THECB) to produce an annual statewide Financial Aid Report, determine state aid program allocations, conduct compliance monitoring, and generate additional statewide and institutional reports.

- [FY 2022 FAD Comprehensive Report Manual \[PDF\]](#)
- [FY 2021 FAD Comprehensive Report Manual \[PDF\]](#)

State Campus Based Programs

- [FY 2022 State Campus-Based Programs Annual Report \[PDF\]](#)
- [FY 2022 State Campus-Based Programs Annual Report- Submission Form Link](#)
- [FY 2021 State Campus-Based Programs Annual Report \[PDF\]](#)
- [FY 2021 State Campus-Based Programs Annual Report- Submission Form Link](#)

Net Price Calculator (NPC)

- [State Net Price Calculator \(NPC\) Instructions](#)

Comprehensive Program Guidelines

- [2022-2023 State Financial Aid Program Guidelines \[PDF\]](#)
- [2021-2022 State Financial Aid Program Guidelines \[PDF\]](#)
- [2020-2021 State Financial Aid Program Guidelines \[PDF\]](#)

Managing Programs

- [Grants and Special Programs Online Return of Funds Form](#)
- [Online Loans Return of Funds Form](#)
- [Electronic Funds Transfer Instructions](#)

Web Portals

To add, update or remove a user's access, submit a [User Access Form \[PDF\]](#).

MOVEit DMZ

- [MOVEit DMZ Login](#)
- [MOVEit DMZ User Guide \[PDF\]](#)

CBPass

- [CBPass Login](#)
- [CBPass Quick Start Guide](#)
- [CBPass Administrator Guide](#)

HelmNet (HHLOANS)

- [HelmNet \(HHLOANS\) Login](#)
- [HelmNet Change Transactions Instruction Guide \[PDF\]](#)
- [HelmNet Online Reporting Manual \[PDF\]](#)

CUSTOMER SATISFACTION SURVEY: Take a moment to provide feedback.

Form Walk-Through

Private/independent institutions only need to complete SECTION ONE.

Institutional Information	
Institution Name:	FICE Code:

SECTION ONE MUST BE COMPLETED BY PARTICIPATING PUBLIC AND PRIVATE/INDEPENDENT INSTITUTIONS	
SECTION ONE: License Plate Insignia Scholarship Program, FY 2022 (9/1/2021- 8/31/2022) (Texas Transportation Code, Title 7, Section 504.615)	
Were funds from the sale of specialty license plates earned in FY 2022?	
<input type="checkbox"/> YES <input type="checkbox"/> NO Response required	
A.	LPI carry-forward balance into FY 2022 (Amount cannot be negative)
B.	Total amount of investment income earned on program funds in FY 2022
C.	Total amount of LPI funds deposited in FY 2022
D.	Total amount of LPI funds awarded as scholarships in FY 2022
E.	Total amount of funds transferred from LPI to TPEG in FY 2022 (PUBLIC INSTITUTIONS ONLY)
F.	FY 2023 LPI carry-forward balance = A+B+C-(D+E) (Amount cannot be negative)
If D is greater than zero, complete the following:	
G.	Enter the total number of LPI scholarship recipients awarded in FY 2022

Form Walk-Through

(continued)

SECTIONS TWO AND THREE MUST BE COMPLETED BY PARTICIPATING PUBLIC INSTITUTIONS ONLY		
SECTION TWO: Student Deposit Scholarship Program, FY 2022 (9/1/2021-8/31/2022) (Texas Education Code (TEC), Title 3, Section 54.5021)		
Were student deposit fees collected in FY 2022?		<input type="checkbox"/> YES <input type="checkbox"/> NO Response required
If NO, leave this section blank and go to SECTION THREE. If YES, complete the following:		
A.	SDS carry-forward balance into FY 2022 (Amount cannot be negative)	
B.	Total amount of investment income earned on program funds in FY 2022	
C.	Total amount forfeited general deposits in FY 2022	
D.	Total amount of SDS funds obligated and expended in FY 2022 Note: Obligated funds = encumbered by 8/31/2022 but paid after 9/1/2022 Expended funds = 9/1/2021 - 8/31/2022	
E.	Total amount of funds transferred from SDS to TPEG in FY 2022	\$ 0.00
F.	FY 2023 SDS carry-forward balance = $A+B+C-(D+E)$ (Amount cannot be negative)	\$ 0.00
G.	150% of B + C	\$ 0.00
H.	*Excess amount = F - G	\$ 0.00
*If H is greater than zero, the excess amount must be sent to the THECB.		

Form Walk-Through (continued)

SECTION THREE: Texas Public Educational Grant (TPEG) Program, FY 2022 (9/1/2021- 8/31/2022) (TEC, Title 3, Section 56.031) (TAC, Title 19, Section 22.64)		
A.	TPEG carry-forward balance into FY 2022 include funds transferred to TPEG from Emerg. Loans (Amount cannot be negative)	
B.	Total amount of investment income earned on program funds in FY 2022	
C.	Total amount of TPEG set-aside deposits made in FY 2022	
D.	Total amount of funds transferred from LPI to TPEG	\$ 0.00
E.	Total amount of funds transferred from SDS to TPEG	\$ 0.00
F.	Total amount of TPEG awards obligated and expended in FY 2022 Note: Obligated funds = encumbered by 8/31/2022 but paid after 9/1/2022 Expended funds = 9/1/2021 – 8/31/2022	
G.	Total amount TPEG funds transferred for Emergency Loans	
H.	FY 2023 TPEG carry-forward balance = A+B+C+D+E-(F+G) (Amount cannot be negative)	\$ 0.00
I.	150% of C	\$ 0.00
J.	*Excess amount = H - I	\$ 0.00
*If J is greater than zero, the excess amount must be sent to the THECB.		
Emergency Loan Program Funded through TPEG Set Asides, (TEC, Title 3, Section 56.051)		
If G is greater than zero, complete the following:		
K.	Total amount of Emergency Loans awarded in FY 2022	\$ 0.00
L.	Total number of Emergency Loan recipients awarded in FY 2022	0
M.	10% of C	\$ 0.00
N.	*Excess amount = G - M	\$ 0.00
*If N is greater than zero, the excess amount must be transferred back to TPEG by the institution.		

Submission Form

2021-22 (FY 2022)
STATE CAMPUS-BASED PROGRAMS
Annual Report

The Texas Higher Education Coordinating Board (THECB) is required to monitor the License Plate Insignia (LPI) Scholarship, Student Deposit Scholarship (SDS), and Texas Public Educational Grant (TPEG) programs. In order to comply, all institutions that participate in these programs must complete this State Campus-Based Programs Annual Report for FY 2022. Institutions have until **Oct. 28, 2022**, to submit the form along with any excess funds identified. Institutions that participate in the TPEG program must include a copy of their TPEG guidelines with their submission in accordance with [Texas Administrative Code \(TAC\) Title 19, Section 22.64](#).

Private/independent institutions only need to complete SECTION ONE.

Institutional Information
Institution Name: _____ FICE Code: _____

SECTION ONE: License Plate Insignia Scholarship Program, FY 2022 (9/1/2021- 8/31/2022)
(Texas Transportation Code, Title 7, Section 504.615) ☐ YES ☐ NO
Response required

Were funds from the sale of specialty license plates earned in FY 2022?
If NO, leave this section blank and go to SECTION TWO. If YES, complete the following:

A.	LPI carry-forward balance into FY 2022 (Amount cannot be negative)	
B.	Total amount of investment income earned on program funds in FY 2022	\$ 0.00
C.	Total amount of LPI funds deposited in FY 2022	\$ 0.00
D.	Total amount of LPI funds awarded as scholarships in FY 2022 (PUBLIC INSTITUTIONS ONLY)	\$ 0.00
E.	Total amount of funds transferred from LPI to TPEG in FY 2022 (Amount cannot be negative)	\$ 0.00
F.	FY 2022 LPI carry-forward balance = A+B+C-(D+E)	\$ 0.00

If D is greater than zero, complete the following:

G.	Enter the total number of LPI scholarship recipients awarded in FY 2022	
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SECTIONS TWO AND THREE MUST BE COMPLETED BY PARTICIPATING PUBLIC INSTITUTIONS ONLY
SECTION TWO: Student Deposit Scholarship Program, FY 2022 (9/1/2021- 8/31/2022)
(Texas Education Code (TEC), Title 3, Section 54.5021) ☐ YES ☐ NO
Response required

Were student deposit fees collected in FY 2022?
If NO, leave this section blank and go to SECTION THREE. If YES, complete the following:

A.	SDS carry-forward balance into FY 2022 (Amount cannot be negative)	
B.	Total amount of investment income earned on program funds in FY 2022	
C.	Total amount of forfeited general deposits in FY 2022	
D.	Total amount of SDS funds obligated and expended in FY 2022	\$ 0.00
E.	Note: Obligated funds = encumbered by 8/31/2022 but paid after 9/1/2022	\$ 0.00
F.	Total amount of funds transferred from SDS to TPEG in FY 2022	\$ 0.00
G.	FY 2022 SDS carry-forward balance = A+B+C-(D+E) (Amount cannot be negative)	\$ 0.00
H.	150% of B+C	\$ 0.00
I.	*Excess amount = F - G	\$ 0.00

If H is greater than zero, the excess amount must be sent to the THECB.

As of 9/22/2022



State Campus-Based Report FY 2022

Below is the required fillable report that participating private and all public institutions will use to submit data for the 2021-22 (FY 2022) academic year. The deadline to upload the completed report, a current copy of each institution's TPEG guidelines (which must include an "As-Of" date), and return any excess amount of funds (if applicable) to the THECB is **Oct. 28, 2022**.

Instructions

Complete the following steps to submit this report:

1. Save a completed copy of the fillable PDF [State Campus-Based Report FY 2022](#)
2. Complete all fields on the form below.
3. Upload your completed report and TPEG guidelines (if applicable).
4. Click "submit" to send your submission.

Institution Type *

Select

Institution Name *

Select

File Upload (multiple files allowable) *

1. Upload the completed fillable FY 2022 State Campus-Based Report (PDF). To ensure your report can be processed by the THECB, please do not submit a scanned copy.
2. Upload a current copy of your institution's TPEG Guidelines, if applicable (which must include an "As-Of" date).

Drag and drop files here or [browse files](#)

Name of Certifying Official *

By submitting this form, I hereby certify that information provided in the State Campus-Based Report is accurate for the 2021-22 academic year and that the TPEG Program Guidelines (if applicable) are the most current version on file.

Title *

Email *

Phone Number *

+1 () -

Form Date Field *

☐ Send me a copy of my responses

Submit

Things to Avoid



- ✓ Negative carry-forward totals
- ✓ High interest earned amounts
- ✓ Spending more than what's available
- ✓ Not spending any funds
- ✓ Transferring too much TPEG into the emergency loan fund

FAQs

Your Questions Answered

Revised Grant Allocations and Carry Forward FY 2023

Q: How can I request my remaining grant funds for FY 2022?

A: Unfortunately, you can no longer request funds for FY2022. Any grant funding (including B.1.10) that you were unable to request by the deadline date of August 1st has been carried forward for FY2023. If you want to request grant funding for FY2023, you can do that now through the Grant Payment Portal application in CBPass. If you want to request B.1.10 funds, you can request it through a dedicated B.1.10 strategy request form: [2022-23 \(FY23\)B.1.10 Strategy Funds Request Form \(smartsheet.com\)](https://smartsheet.com)

Q: Where can I find my carry-forward amounts?

A: A memo was released on Sept. 14 to financial aid directors, listing the revised grant allocations for FY2023 which included the institution's FY2022 carry-forward of funds, along with a redistribution of unencumbered FY2022 program funds based on each institution's calculated share, as stated in the administrative rules. Institutions have until August 1, 2023, to request grant (including B.1.10) funds.

Selective Service

Q: If we have an ISIR from a prior year confirming their selective service registration status, do we have to re-confirm their status?

A: If the student's selective service status will not change, the confirmation previously received on the ISIR can be used for subsequent academic years. If their status is temporary, a status statement must be collected each academic year until the student is registered or determined exempt. For example, a student who is under the age of 18 must provide statements confirming their status until it no longer changes.

Q: I'd like to verify that the proof of Selective Service registration will no longer be required beginning with the 2023-2024 TASFA per an email received Sep 12, 2022.

A: While the Selective Service Statement of Registration Status form is still required for students receiving state financial aid, ***proof*** of Selective Service registration is no longer required.

Child Support Arrearages

Q: Which programs does the Child Support Arrearages requirement apply to?

A: Unfortunately, THECB cannot make an interpretation on which programs are bound to the child arrearages requirement. The Texas Family Code is not a statute that the THECB can interpret; we can only inform institutions of the requirement. Ultimately, the institution determines the process and the programs that must adhere to the statute we provided on the child support arrearages based on the institution's interpretation of the relevant statute. If there is ambiguity in any of the statutes and rules cited in the program guidelines, we recommend you consult with your general counsel or other internal compliance for a more thorough review of the applicable law and a legal interpretation, if necessary.

TASFA Updates

Paper and Online Versions

Paper TASFA Updates



The Texas Application for State Financial Aid (TASFA) is a free application that 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 Student Aid (FAFSA) to complete the TASFA. To review the FAFSA filing requirements, visit studentaid.gov or contact the financial aid office. The 2023-24 award year, the federal application covers federal and state financial aid opportunities. If you meet the FAFSA requirements, you must complete a completed FAFSA.

YOU DO NOT NEED TO COMPLETE BOTH THE FAFSA AND TASFA.

The 2023-24 state financial aid priority application deadline for many institutions of higher education is January 15. This application with all required documentation to the financial aid office on or before Jan. 15 to be considered for the

To complete this application, answer each item within each section. If a question does not apply to you, answer N/A. Items, refer to the **TASFA Notes on pages 7-14**. If you have further questions about this form, contact the financial aid office.

Note: Personal information collected on the TASFA is protected under the Family Educational Rights and Privacy Act (FERPA) of 1974.

SECTION 1: STUDENT INFORMATION

DEMOGRAPHICS		
1. Last Name	2. First Name	
4. Date of Birth	5. What is your Social Security Number (SSN), Individual Taxpayer Identification Number (ITIN), or check N/A if you are a Deferred Action for Childhood Arrivals (DACA) number?	
6. Your permanent mailing address number and street (include apt. number).		
7. City	8. State	9. ZIP Code
11. Your Email Address		
EDUCATION DETAILS		
12. What will your high school (HS) completion status be when you begin college in the 2023-24 school year?		
<input type="checkbox"/> High School Diploma <input type="checkbox"/> High School Equivalency Certificate (i.e., GED, HSET, etc.) (Skip to questions 13c & 13d)		
13a. High School Name (if applicable)		
13b. High School City (if applicable)		13c. HS State (if applicable)
14. Will you have your first bachelor's degree before you begin the 2023-24 school year? <input type="checkbox"/> Yes <input type="checkbox"/> No		

SELECTIVE SERVICE STATEMENT OF REGISTRATION STATUS

An individual born male must complete the Selective Service Statement of Registration Status below, in accordance with Section 51.9095. For more information on Selective Service registration, visit sss.gov.

15. Were you born male or female? ☐ Male ☐ Female

16. Please mark one option below:

<input type="checkbox"/> I was born female and not required to register. <input type="checkbox"/> I was born male and am under the age of 18, and not currently required to register. <input type="checkbox"/> I was born male and am REGISTERED with the Selective Service. <input type="checkbox"/> I was born male and am over age 18. I am not registered with the Selective Service, and I am not exempt.	<input type="checkbox"/> I was born male and (please briefly explain why you are not registered with the Selective Service)
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2023-24 Texas Application for State Financial Aid (TASFA)



The Texas Application for State Financial Aid (TASFA) is a free application that is accepted at public and private colleges in the State of Texas. These notes help explain certain questions on the TASFA, but you can also contact the financial aid office at the institution you currently attend or plan to attend for the 2023-24 award year if you need additional assistance completing this application.

SECTION ONE: STUDENT INFORMATION

Notes for questions 1 and 2 (page 1)

Enter your full, legal first and last name. Do not use nicknames or abbreviations since this information will be used to match your application with your official student record if you enroll at a college.

Notes for question 5 (page 1)

If you have been issued a Social Security card, enter your assigned number. If you have been approved for Deferred Action for Childhood Arrivals (DACA), enter your assigned Social Security Number (SSN) through this program. If you have an Individual Taxpayer Identification Number (ITIN), enter it. If you do not have any of these, mark "N/A."

Note that an SSN is not necessary to be eligible for state financial aid and will be used to match your application with your official student record if you enroll at a college. Personal information collected on the TASFA is protected under the Family Educational Rights and Privacy Act (FERPA) of 1974.

Notes for question 6 (page 1)

Enter your permanent mailing address street number and street name, or PO Box (be sure to include your apartment number, if applicable).

Notes for question 11 (page 1)

Enter your email address. Do not use an email account issued by your high school, college or work. The email account should be one you review often. You must provide your email address.

Notes for question 12 (page 1)

Select the answer that describes your high school completion status:

- High school diploma means you have received or will receive a high school diploma before the first date of your enrollment in college.
- High School Equivalency Certificate (i.e., GED, HSET, etc.) means you have received or will receive an equivalency certificate before the first date of your enrollment in college.
- Homeschooled means you have completed homeschooling at the secondary level regulated by your state.
- "None of the Above" means you do not or will not have a high school diploma, GED, or equivalent before the first date of your enrollment in college and did not complete secondary school in a homeschool setting.

Notes for question 15 (page 1)

Enter your gender at birth. This will only be used for purposes of determining items related to Selective Service.

Notes for question 16 (page 1)

Individuals who were born male are required to complete a Selective Service Statement of Registration Status [Texas Education Code \(TEC\), Title 3, Section 51.9095](https://www.irs.gov/uaac/About-Publication-17). If you are male and between the ages of 18 through 25, you can register or review registration requirements 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.

Notes for question 17 (page 2)

Report your marital status as of the date you sign your TASFA. If your marital status changes after you sign your TASFA, check with the financial aid office at your institution.

Notes for question 19 (page 2)

If your spouse has been issued a Social Security card, enter the assigned number. If they have been approved for Deferred Action for Childhood Arrivals (DACA), enter their assigned Social Security Number (SSN) through this program. If they have an Individual Taxpayer Identification Number (ITIN), enter it. If they do not have any of these, mark "N/A."

Note that an SSN is not necessary to be eligible for state financial aid and will be used to match your application with your official student record if you enroll at a college. Personal information collected on the TASFA is protected under the Family Educational Rights and Privacy Act (FERPA) of 1974.

Notes for questions 20 and 21 (page 2)

Enter 2021 earnings (wages, salaries, tips, etc.), even if a tax return was not filed. This information may be on W-2 forms or on your tax return: IRS Form 1040—line 1 (or IRS Form 1040-NR—line 1a) + Schedule 1—lines 3 + 6 + Schedule K-1 (IRS Form 1065)—Box 14 (Code A).

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: 2021 Filing Requirements for Most Taxpayers. See <https://www.irs.gov/uaac/About-Publication-17>.

Nontax filers: If you (and your spouse) did not file taxes, contact the financial aid office to see if additional information is needed.

Notes for question 22 (page 2)

If you indicate you "Will file" a 2021 tax return and your 2020 income is similar to your 2021 income, use your 2020 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 23 (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/.

- English and Spanish versions will be published Oct. 1, 2022, on College for All Texans and the Student Financial Aid Programs webpages.

- Overall application was redesigned using agency's new branding.

NOTE: All institutions are *required* to accept the paper TASFA from eligible students starting in the 2023-24 award year.

Paper TASFA Updates

What will your college grade level be when you begin the 2022-23 school year?	What degree or certificate will you be working on when you begin 2022-23 school year?
Never attended college <input type="checkbox"/>	1st bachelor's degree <input type="checkbox"/>
1st year undergraduate <input type="checkbox"/>	2nd bachelor's degree <input type="checkbox"/>
2nd year undergraduate/sophomore <input type="checkbox"/>	Associate degree <input type="checkbox"/>
3rd year undergraduate/junior <input type="checkbox"/>	Certificate or diploma <input type="checkbox"/>
4th year undergraduate/senior <input type="checkbox"/>	Teaching credential (nondegree program) <input type="checkbox"/>
5th year/other undergraduate <input type="checkbox"/>	Graduate or professional degree <input type="checkbox"/>
1st year graduate/professional <input type="checkbox"/>	Other/undecided <input type="checkbox"/>
Continuing graduate/professional or beyond <input type="checkbox"/>	

2022-23 Texas Application for State Financial Aid (TASFA) Page 1

STUDENT INFORMATION continued... (See Notes for questions 24-29) Reminder: Fill in all questions or choose N/A.

21. Where do you plan to live during the 2022-23 school year?
☐ On-campus ☐ Off-campus ☐ With parent or relative

22. At the start of the 2022-23 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?
☐ Yes (Enter date you earned an Associate Degree: ____/____/____)
☐ No

24. Were you born male or female?
☐ Male ☐ Female

25. Have you been convicted of a felony, or crime involving a controlled substance?
☐ Yes ☐ No

26. Have you previously received Student Financial Aid from Texas?
☐ Yes ☐ No

27. Do you have authorization to work in the United States?
☐ Yes ☐ No ☐ Don't know ☐ N/A

(B) If yes, are you interested in applying for a work-study program?
☐ Yes ☐ No ☐ Don't know

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

2022-23 TASFA

Some questions have been removed from the application based on the TASFA committee's recommendations which include:

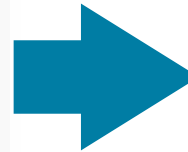
# 17	#19	#20	#22	#23	#25	#26	#27
Date of graduation	College grade level	Degree/ Certificate attempting	Number of credits enrolled	Associate degree for transfers	Conviction restrictions	Previously received state aid	Work authorization and work-study interest

Paper TASFA Updates

2022-23 Paper TASFA

For questions, 71-82, 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. 2020 UNTAXED INCOME (See Notes for questions 71-76)				
71. Child support received for any of your children.				
72. Housing, food, and other living allowances paid to members of the military, clergy, and others. (See Notes page 8.)				
73. Other untaxed income not reported. (Such as worker's compensation, disability, veterans noneducation benefits, etc.)				
74. Cash earnings. (Income not already reported on taxes. Do NOT include W-2 earnings.)				
75. Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form.			N/A	N/A
76. TOTAL UNTAXED INCOME (Automatically calculates if completed electronically.)		\$ 0.00		\$ 0.00



2023-24 Paper TASFA

33. STUDENT 2021 UNTAXED INCOME		
a.	Payments to tax-deferred pension and retirement savings plans (paid directly or withheld from earnings).	
b.	IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040 Schedule 1—total of lines 16 + 20.	
c.	Child support received for any of your children. Don't include foster care or adoption payments.	
d.	Tax exempt interest income from IRS Form 1040—line 2a.	
e.	Untaxed portions of IRA distributions and pensions from IRS Form 1040—(lines 4a + 5a) minus (lines 4b + 5b). Exclude rollovers. If negative, enter a zero here.	

83. PARENT 2021 UNTAXED INCOME (ENTER THE COMBINED AMOUNTS FOR YOUR PARENTS)		
a.	Payments to tax-deferred pension and retirement savings plans (paid directly or withheld from earnings).	
b.	IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040 Schedule 1—total of lines 16 + 20.	
c.	Child support received for any of your children. Don't include foster care or adoption payments.	
d.	Tax exempt interest income from IRS Form 1040—line 2a.	
e.	Untaxed portions of IRA distributions and pensions from IRS Form 1040—(lines 4a + 5a) minus (lines 4b + 5b). Exclude rollovers. If negative, enter a zero here.	
f.	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.	
g.	Veterans noneducation benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	
h.	Other untaxed income not reported, such as workers' compensation, disability benefits, untaxed foreign income, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040 Schedule 1—line 13.	

There are now separate student and parent sections.

Paper TASFA Updates

Student can now include the institution's information, applicable housing status and optional student ID when completing multiple PDF versions.

SECTION 4: COLLEGE INFORMATION

If you plan to submit your TASFA to multiple institutions, **answer the questions below for each copy you submit**. Your housing status is based on your living situation at the college you plan to attend and may vary. Your college student ID, if you were provided one, is an optional item that will be used to match your application with your official student record if you enroll at a college.

What college do you plan to attend for 2023-24? (response optional)

Where do you plan to live when you attend college? (**response required**) ☐ On-campus ☐ Off-campus ☐ With parents or relative

What is your college student ID#, if you were provided one? (response optional)

Paper TASFA Updates

Notes at the end of the TASFA have been modified to provide additional guidance to families with questions and will be similar to the help icons that are being used for the Online TASFA.

Many of these items were updated to more closely align with the FAFSA verbiage to support counselors and administrators who help students completing the TASFA.

The Texas Application for State Financial Aid (TASFA) is a free application that is accepted at public and private colleges in the State of Texas. These notes help explain certain questions on the TASFA, but you can also contact the financial aid office at the institution you currently attend or plan to attend for the 2023-24 award year if you need additional assistance completing this application.

SECTION ONE: STUDENT INFORMATION

Notes for questions 1 and 2 (page 1)

Enter your full, legal first and last name. Do not use nicknames or abbreviations since this information will be used to match your application with your official student record if you enroll at a college.

Notes for question 5 (page 1)

If you have been issued a Social Security card, enter your assigned number. If you have been approved for Deferred Action for Childhood Arrivals (DACA), enter your assigned Social Security Number (SSN) through this program. If you have an Individual Taxpayer Identification Number (ITIN), enter it. If you do not have any of these, mark "N/A."

Note that an SSN is not necessary to be eligible for state financial aid and will be used to match your application with your official student record if you enroll at a college. Personal information collected on the TASFA is protected under the Family Educational Rights and Privacy Act (FERPA) of 1974.

Notes for question 6 (page 1)

Enter your permanent mailing address street number and street name, or PO Box (be sure to include your apartment number, if applicable).

Notes for question 11 (page 1)

Enter your email address. Do not use an email account issued by your high school, college or work. The email account should be one you review often. You must provide your email address.

Notes for question 12 (page 1)

Select the answer that describes your high school completion status.

- High school diploma means you have received or will receive a high school diploma before the first date of your enrollment in college.
- High School Equivalency Certificate (i.e., GED, HiSET, etc.) means you have received or will receive an equivalency certificate before the first date of your enrollment in college.
- Homeschooled means you have completed homeschooling at the secondary level regulated by your state.
- "None of the Above" means you do not or will not have a high school diploma, GED, or equivalent before the first date of your enrollment in college and did not complete secondary school in a homeschool setting.

Notes for question 15 (page 1)

Enter your gender at birth. This will only be used for purposes of determining items related to Selective Service.

Notes for question 16 (page 1)

Individuals who were born male are required to complete a Selective Service Statement of Registration Status ([Texas Education Code \(TEC\), Title 3, Section 51.9095](#)). If you are male and between the ages of 18 through 25, you can register or review registration requirements 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.

Notes for question 17 (page 2)

Report your marital status as of the date you sign your TASFA. If your marital status changes after you sign your TASFA, check with the financial aid office at your institution.

Notes for question 19 (page 2)

If your spouse has been issued a Social Security card, enter the assigned number. If they have been approved for Deferred Action for Childhood Arrivals (DACA), enter their assigned Social Security Number (SSN) through this program. If they have an Individual Taxpayer Identification Number (ITIN), enter it. If they do not have any of these, mark "N/A."

Note that an SSN is not necessary to be eligible for state financial aid and will be used to match your application with your official student record if you enroll at a college. Personal information collected on the TASFA is protected under the Family Educational Rights and Privacy Act (FERPA) of 1974.

Notes for questions 20 and 21 (page 2)

Enter 2021 earnings (wages, salaries, tips, etc.), even if a tax return was not filed. This information may be on W-2 forms or on your tax return: IRS Form 1040—line 1 (or IRS Form 1040-NR—line 1a) + Schedule 1—lines 3 + 6 + Schedule K-1 (IRS Form 1065)—Box 14 (Code A).

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: 2021 Filing Requirements for Most Taxpayers. See <https://www.irs.gov/uac/About-Publication-17>.

Nontax filers: If you (and your spouse) did not file taxes, contact the financial aid office to see if additional information is needed.

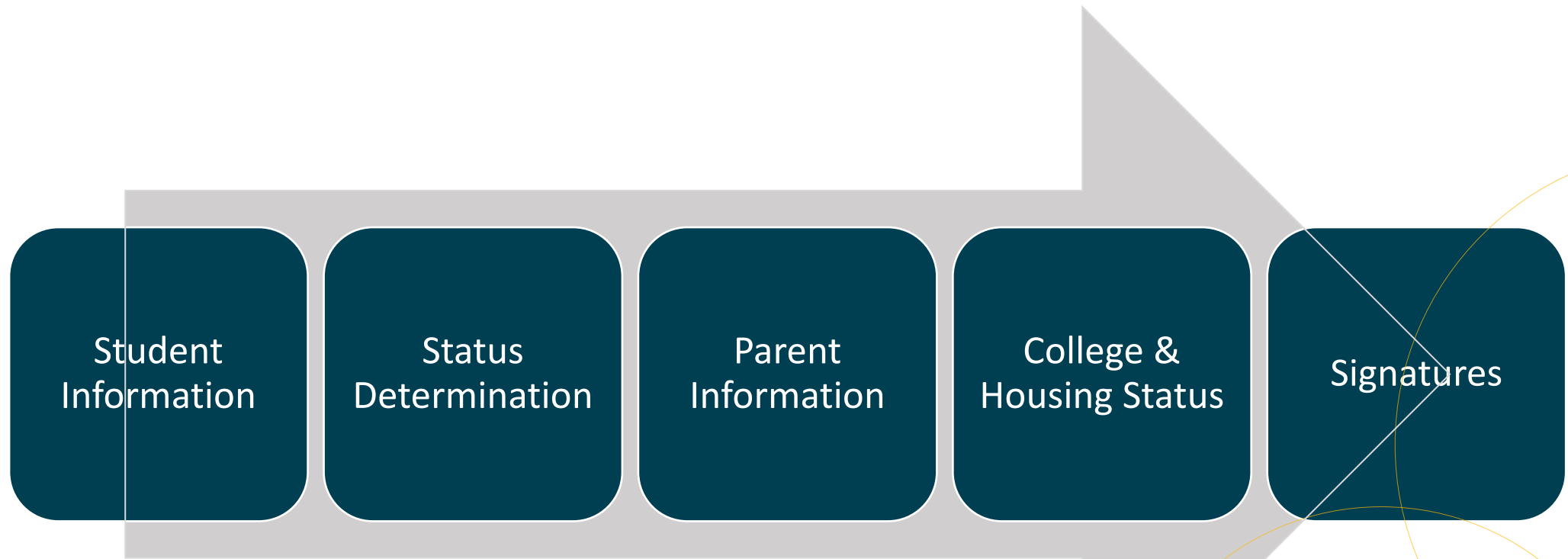
Notes for question 22 (page 2)

If you indicate you "Will file" a 2021 tax return and your 2020 income is similar to your 2021 income, use your 2020 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 23 (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.

New Paper TASFA Flow



Online TASFA Update

An announcement was sent Aug. 26 to communicate that the 2023-24 Online TASFA is delayed.



STAY TUNED

Extending the Online TASFA timeline will enable us to:

- provide adequate training to educators, students, and families; and
- improve data transmission with institutions

As we work to finalize the Online TASFA, we will alert stakeholders of new release dates and other milestones.

Reminders, Updates, and Deadlines

Reminders, Updates, and Deadlines

Reminders

- Institutions can now start requesting funds for FY 2023
- First day to submit 2021-22 (FY 2022) FAD Cycle Three
 - **NEW!** FAD Reconciliation Form and Submission Link (FY 2022)

Updates

- 2023-24 (FY 2024) paper TASFA available to students – **10/1**
- TASFAA Conference – THECB presenting – **10/6**

Deadlines

- Deadline to communicate ineligible Good Neighbor Program recipients – **10/15**
- Deadline to submit 2021-22 (FY 2022) State Campus-Based Report – **10/28**

Contact Student Financial Aid Programs

The following phone lines are available for borrower and the public:

Borrower Services

- Student Borrowers (Cosigners): (800) 242-3062

Texas Financial Aid Information Center

- Public Line: (888) 311-8881

Contact Financial Aid Services in one of the following ways:

FAS Institutional Phone Line

- Institutions Only: (844) 792-2640

Submit inquiries online through the CONTACT US web form.



**Phone Line
Hours of Operation:**
Mon-Fri
8 a.m. to 5 p.m.
(Closed 12-1 daily)

Submit a CONTACT US

To ensure inquiries are routed correctly, complete these steps:

- Select “**Institution**” in *Received From* box.
- Enter the institution’s full name.
- Always select “**Financial Aid Question**” as the Contact Reason.
- Describe your inquiry in 4000 characters or less.
- Provide the best **direct phone number** to reach you.

Texas Higher Education Coordinating Board

Contact Us

An asterisk * by the field indicates a required field!

Received From*

INSTITUTION

Institution

Contact Reason*

*Financial Aid Question

Description*

4000 characters max

Please do NOT include your full Social Security Number inside the issue description. If you have a question about the status of a new loan application, accounts in repayment, or deferments, please use the last four digits of your SSN instead.

Is this a complaint

No ☒ Yes ☐

Contact Preference

E-MAIL ☒ LETTER ☐ PHONE ☐

Salutation*

Dr.

First Name*

Last Name*

E-mail*

Phone (10-digit)

Phone Ext

Mail Address

Mail Address2

Mail Address3

City

State

-- please select State --

Zip Code (5-digit)

Submit

|

[Help](#)



Texas Higher Education

COORDINATING BOARD

Questions?