FAFSA checklist

Have the following items available when completing the FAFSA to streamline the application process. Unless otherwise noted, all income information should be from the prior-prior year. For example, students applying for financial aid during the 2023–24 school year should use 2021 tax information.

- ❏ Social Security card
  - Name, Social Security number, and birthdate must be written exactly as they appear on the individual's Social Security card

- ❏ Alien registration card if not a US citizen

- ❏ Driver's license (if applicable)

- ❏ Tax and income records
  - Copy of your prior-prior year federal tax return
  - W-2s, 1040s, and other wage statements from the prior-prior year
  - Records of any taxable income received (e.g., work-study income, fellowships, grants, and scholarship aid reported to the IRS; combat pay or special combat pay)
  - Records of nontaxable income (e.g., Social Security income, veteran's benefits, military allowances, child support received)

- ❏ Current bank account statements, including records of stocks, bonds, mutual funds, and other investments

- ❏ Current business or investment farm records

- ❏ Federal Student Aid (FSA) ID
  - See the following page for instructions on how to create an FSA ID

Note: If you're a dependent student, you also need the above information for your parent(s).

FSA ID worksheet

The first step to completing your FAFSA is to create an FSA ID (a username and password). Your FSA ID gives you access to the Federal Student Aid system and serves as your legal signature on the FAFSA. Use your personal information to create your FSA ID and provide a unique email address. A parent or sibling cannot create a separate FSA ID using the same email. Don't use a district-assigned email address to create your account. You'll need access to your email account after you graduate from high school.

Complete this form and store it in a safe place. You'll use your FSA ID each year you apply for financial aid.

To create an FSA ID, go to: fsaid.ed.gov.

Student information

Email address: _____

Username: _____

Password: _____ **Backup code:** _____

Date of birth: _____

Challenge question	Answer

Parent information (if applicable)

Note: Your parent will use the same FSA ID for any FAFSA they complete.

Email address: _____

Username: _____

Password: _____ **Backup Code:** _____

Date of birth: _____

Challenge question	Answer

TEXAS ONCOURSE

TASFA checklist

To streamline the TASFA application process, have the following items available (if applicable). Unless otherwise noted, all income information should be from the prior-prior year. For example, students applying for financial aid during the 2023–24 school year should use 2021 tax information. See the following page for supplemental instructions.

❏ Copy of TASFA or paper FAFSA application
  • Access the current year's TASFA application at http://www.collegeforalltexans.com.
  • You can find the paper FAFSA at studentaid.gov.
  • Check with each college before starting your application to confirm which application they want you to submit. Some colleges have an electronic TASFA form you can complete and submit online.

❏ Personal identification
  • Social Security card (if applicable)
  • Alien registration card (if applicable)
  • Individual taxpayer identification number (ITIN), if applicable
  • Permanent home address (as listed on your prior-prior year tax return)
  • Your college student ID number (only available if you've been accepted to the college)

❏ Tax and income records
  • Copy of prior-prior year federal tax return
  • W-2s, 1040s, and other wage statements from the prior-prior year
  • Records of any taxable income received (e.g., work-study income, grants, and scholarship aid reported to the IRS; combat pay or special combat pay)
  • Records of nontaxable income (e.g., Social Security income, veteran's benefits, military allowances, child support received)
  • Current bank account statements, including records of stocks, bonds, mutual funds, and other investments
  • Current business or investment farm records

Note: If you're a dependent student, you also need the above information for your parent(s).

TEXAS ONCOURSE

Preparing for the TASFA: Additional instructions

❏ **Forms needed from the IRS**
- **TAX FILERS** will need a copy of their **2021 tax transcript**. This is different from a tax return. You can request a copy of your tax transcript online from the IRS (note: this step takes a few weeks to process).
- **NON-TAX FILERS** will need a **verification of non-filing letter** from the IRS.
- **Instructions for obtaining either form:**
  - Go online to https://www.irs.gov/individuals/get-transcript.
  - If you have a Social Security number, click *Get Transcript Online*. Otherwise, click Get *Transcript by Mail*. If requesting by mail, the request may take 5–10 days to process. If your current address is not the same as the address on your tax return, you'll need to apply for a change of address.
  - When asked for transcript type, select *Return* or *Verification of Non-Filing* depending on your needs.
  - If you're unable to request a copy of your transcript or non-filing letter online or by mail, submit IRS form 4506-T directly to the IRS. Check Box 7 if you are requesting the Verification of Non-filing Letter.

❏ **(Males) Selective Service registration**
- **All male students aged 18 to 25** must complete the Selective Service registration to be eligible for financial aid. **Note: This only applies to students assigned male at birth.**
- Find a printable Selective Service registration application online at www.sss.gov. You can also get the form at your local post office. **Note: You can register online if you have a Social Security number.**
- Mail your printed form to the following address:

  Selective Service System
  P.O. Box 94739
  Palatine, IL 60094-4793

❏ **Completed residency affidavit**
- Students must send a notarized Affidavit of Intent to Become a Permanent Resident (residency affidavit) to each school they apply to.
- Access a copy of the residency affidavit online at https://tasfa.net/english/texas-affidavit/. Check with each college's financial aid office to confirm that they accept this version of the form.
- Check with your high school, bank, library, or nearby parcel shipment store to find a notary public. You can also search for nearby notaries online at https://www.nationalnotary.org/resources-for/public/find-a-notary.

TEXAS ON COURSE