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Office of Student Financial Services  
P. O. Box 20036 • Houston, TX 77225  
(713) 500-3860 phone • (713) 500-3863 fax  
<https://www.uth.edu/sfs/>

The Health Professions Student Loan Program (HPSL) and the Loans for Disadvantaged Students Program (LDS) are need-based federal loan programs that provide long-term, low-interest rate loans to students in the Doctor of Medicine and Doctor of Dental Surgery programs. The HPSL and LDS programs are funded by the Health Resources and Services Administration (HRSA) and Bureau of Health Professions and are offered on a first come, first serve basis to those who qualify.

Applicants are required to submit the Parent Income & Resource Certification form in addition to reporting parent data and financial information on the Free Application for Federal Student Aid (FAFSA). Unless the parent(s) are deceased, a student who does not provide parent information will not be considered for HPSL or LDS funds. **Important Note: The instructions below apply to the parent.**

Submit forms using **ONE** of the following methods:

- Online:** Log on to myUTH, click on the Document Center tile. In the "Upload Additional Documents" section, under "What type of document would you like to upload?" select "FA Unsolicited Documents". Under "Select the document from the list", choose the type of document you wish to upload, follow instructions to attach document, then click Submit.
- In Person:** UCT Building, 7000 Fannin, Suite 2220, Houston, TX 77030

**A. STUDENT DATA**

|                   |            |                |                 |
|-------------------|------------|----------------|-----------------|
| Student Last Name | First Name | Middle Initial | Student Program |
|-------------------|------------|----------------|-----------------|

**B. PARENT DATA**

|                  |            |                |                         |
|------------------|------------|----------------|-------------------------|
| Parent Last Name | First Name | Middle Initial | Relationship to Student |
|------------------|------------|----------------|-------------------------|

|                      |                          |
|----------------------|--------------------------|
| Parent Date of Birth | State of Legal Residency |
|----------------------|--------------------------|

Married \_\_\_\_\_ Date     
  Separated \_\_\_\_\_ Date     
  Divorced \_\_\_\_\_ Date     
  Widowed \_\_\_\_\_ Date

**C. PARENT TAX FILER**

Complete this section if the student's parent(s) filed a 2019 IRS Income Tax Return then skip to sections E through G.

- The parent(s) used the IRS Data Retrieval Tool (IRS DRT) to transfer **2019** IRS Income Tax Return information into the student's FAFSA did not change any data
- The parent(s) will update the student's FAFSA with **2019** IRS Income Tax Return information using the IRS DRT on [www.fafsa.ed.gov](http://www.fafsa.ed.gov)
- The parent(s) is/are not eligible for or chose not to use the IRS DRT. The parent(s) will request and submit to the school a **2019** IRS Tax Return Transcript. If parents filed separate income tax returns, both tax transcripts are needed.

An IRS Tax Return Transcript may be obtained through:

- Get Transcript by Mail – Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- Get Transcript Online – Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name and (3) specific financial account numbers (such as credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- Automated Telephone Request – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request.

- The parents have been granted a Tax Filing Extension by the IRS beyond the automatic six-month extension for tax year 2019 must provide:
  - A copy of the IRS Form 4868, "Application for Automatic Extension of Time to File U.S. Individual Income Tax Return", that was filed with the IRS for tax year 2019;
  - A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2019
  - A copy of IRS Form W-2 for each source of employment income received for tax year 2019 and if self-employed, a signed statement certifying the amount of my Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2019.

**D. PARENT TAX NON FILER**

Complete this section if the parent(s) did not file or are not required to file a 2019 IRS Income Tax Return then continue to sections E through G

- Neither parent was employed nor had any income earned from work in 2019
- One or both parents were employed in 2019 and have listed below the names of all employers, the amount earned from each employer in 2019, and whether an IRS W-2 form is provided.

Provide copies of all 2019 IRS W-2 forms issued to the parents by their employer(s). List every employer even if the employer did not issue an IRS W-2 form. If more space is needed, attach a separate page.

| Employer's Name | Annual Amount Earned in 2019 | IRS W-2 Provided? |
|-----------------|------------------------------|-------------------|
|                 |                              |                   |
|                 |                              |                   |
|                 |                              |                   |
|                 |                              |                   |
|                 |                              |                   |

**E. PARENT INCOME AND ASSETS**

List all sources of earned and untaxed income and benefits that you and your spouse (if married) received in 2019. If earnings are from outside the United States, all earnings must be converted to U.S. Dollars. Enter "0" when appropriate. Do not leave any items blank. Provide copies of all 2019 IRS W-2 forms issued to you and your spouse (if married) by your employer.

|   |    |              |
|---|----|--------------|
| Earned Income (wages, salaries, tips, etc.) – Parent 1  | \$ | (a)          |
| Earned Income (wages, salaries, tips, etc.) – Parent 2  | \$ | (b)          |
| Untaxed Unemployment Compensation   | \$ | (c)          |
| Supplemental Nutrition Assistance Program (SNAP)  | \$ | (d)          |
| Temporary Assistance for Needy Families (TANF)  | \$ | (e)          |
| Special Supplemental Nutrition Program for Women, Infants and Children (WIC)  | \$ | (f)          |
| <input type="checkbox"/> Social Security <input type="checkbox"/> Disability Benefits   | \$ | (g)          |
| Child Support <i>received</i> for all children  | \$ | (h)          |
| Other untaxed income and/or earnings<br>Source: _____   | \$ | (i)          |
| Total <i>current</i> balance of cash, savings and checking accounts   | \$ | (j)          |
| Net worth of investments, including real estate <i>(not your primary residence)</i><br>Net worth means current value minus debt | \$ | (k)          |
| Net worth of current business and/or investment farms<br>(Do not include a farm on which you live and operate)                  | \$ | (l)          |
| Add columns (a) through (l)   | \$ | <b>TOTAL</b> |

## F. PARENT HOUSEHOLD INFORMATION

List the names of all family members for whom you support below. Include the UT student even if they do not live with you or you do not support him/her.

Household size is the number of exemptions listed on parent federal income tax plus the student if not included as an exemption. Income level is Adjusted Gross Income (AGI) for 2019 income tax calendar year. Income level is based on 200% of the 2021 Poverty Guidelines. If more space is needed, attach a separate page.

| Full Name of Household Member | Age | Relationship to Student    | College Attending                            |
|-------------------------------|-----|----------------------------|--|
|                               |     | <b>Parent/Stepparent 1</b> | <i>This section intentionally left blank</i> |
|                               |     | <b>Parent/Stepparent 2</b> | <i>This section intentionally left blank</i> |
|                               |     | <i>UT Student</i>          |  |
|                               |     |                            |  |
|                               |     |                            |  |
|                               |     |                            |  |

## G. CERTIFICATION AND SIGNATURE

Signing below certifies the information reported on this worksheet is complete and correct. The parent whose information was reported on this form and the FAFSA must sign and date below.

\_\_\_\_\_  
Parent Signature (no electronic signatures accepted)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Student Signature (no electronic signatures accepted)

\_\_\_\_\_  
Date