Thank you for your interest in applying for federal student aid for the 2013-2014 academic year.

While there is no application deadline for financial aid, it is recommended that students complete all required documents as soon as possible to be considered for institutional funds.

Students must be degree-seeking U.S. citizens or eligible non-citizens to apply for federal student aid (Title IV).

Students who first enroll in a Title IV-eligible program of study on or after July 1, 2012, must have a high school diploma or its recognized equivalent in order to receive Title IV aid.

**How to Apply**

**DOCUMENT REQUIRED OF ALL APPLICANTS**

**Free Application for Federal Student Aid (FAFSA)**
Go to [http://www.fafsa.ed.gov/](http://www.fafsa.ed.gov/) to complete the federal application online. Students must select the appropriate school code to avoid delays in the award process.

The University of Texas Health Science Center at Houston: **013956**

The University of Texas MD Anderson School of Health Professions: **017249**

The University will use the information provided on the FAFSA to assess your financial need for student aid.

**SCHOLARSHIPS**


**FEDERAL AND INSTITUTIONAL GRANTS**

**Federal Pell Grant**
Pell Grants are usually awarded only to undergraduate students who have not earned a bachelor’s or a professional degree. In some cases, however, a student enrolled in a post baccalaureate teacher certification program might receive a Pell Grant. The Pell Grant does not need to be repaid (unless, for example, you withdraw from school and owe a refund).
Pell grant amounts are determined based on the Higher Education Act of 1965, as amended (HEA) and may change yearly. The maximum Pell Grant award for the 2013-2014 award year (July 1, 2013 through June 30, 2014) is $5645. The amount you may be awarded will depend on:

- Your financial need
- Your cost of attendance
- Your enrollment status (full time, half-time, etc.)
- Your plans to attend school for a full academic year or less

You may not receive Federal Pell Grant funds from more than one school at a time.

Federal law limits the amount of Federal Pell Grant funds a student may receive over his or her lifetime to be the equivalent of six years of Pell Grant funding. Since the maximum amount of Pell Grant funding a student can receive each year is equal to 100%, the six-year equivalent is 600%.

Federal Supplemental Educational Opportunity Grant (FSEOG)
The FSEOG is a grant program administered directly by the financial aid office of participating schools. Students who will receive Federal Pell Grants and have the most financial need will receive FSEOG first. Like the Pell Grant, FSEOG does not need to be repaid.

FSEOG awards are made on a first come, first served basis to those who qualify based on fund availability.

Texas Public Education Grant (TPEG)
The Texas Public Education Grant is a grant provided to students with financial need and is administered directly by the financial aid office of participating schools. TPEG awards are made on a first come, first served basis to those who qualify based on fund availability.

Eligibility Requirements for TPEG:

- You must be a Texas resident, non-resident or foreign student
- You must demonstrate financial need as determined by the Department of Education
- You must register for Selective Service, unless exempt

Note: All grant funds will be accepted on the student’s behalf by the Office of Student Financial Services. For more information regarding grant programs please call the Office of Student Financial Services at (713) 500-3860.
FEDERAL LOANS

Direct Subsidized Loans
Direct Subsidized Loans are optional. These loans are available to undergraduate students who demonstrate financial need as determined by the Department of Education. Direct Subsidized Loans assist with educational expenses but may not exceed financial need. You, the student, are responsible for repaying the loan.

No interest is charged while a student is enrolled at least half-time in an eligible school, for the first six months after you leave school (referred to as a grace period*) and during deferment periods.

*If you receive a Direct Subsidized Loan that is first disbursed between July 1, 2012 and July 1, 2014, you will be responsible for paying any interest that accrues during your grace period. If you choose not to pay the interest that accrues during your grace period, the interest will be added to your principal balance.

Direct Unsubsidized Loans
Direct Unsubsidized Loans are optional. These loans available to both undergraduate and graduate students and are not based on financial need as determined by the Department of Education. You, the student, are responsible for repaying the loan.

Interest is charged during all periods; even during the time a student is enrolled at least-half time in an eligible school, during grace and deferment periods.

Loan Fees
You pay a 1% loan origination fee on all Direct Subsidized/Unsubsidized Loans. The loan fee will be proportionately deducted from each loan disbursement.

Impact of Sequestration on the Federal Student Aid Programs
Click here to read about the Impact of Sequestration on the Federal Student Aid Programs https://studentloans.gov/myDirectLoan/images/SequestrationImpact.pdf

Disbursements
The Direct Subsidized/Unsubsidized Loan will be evenly disbursed over the terms of your enrollment for the current award period unless otherwise indicated.

Federal Direct Loan Limits

<table>
<thead>
<tr>
<th></th>
<th>Undergraduate students</th>
<th>Graduate students</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Dependent(^1)</td>
<td>Independent(^2)</td>
</tr>
<tr>
<td>1st-year</td>
<td>$5,500 ($3,500)(^3)</td>
<td>$9,500 ($3,500)</td>
</tr>
<tr>
<td>2nd-year</td>
<td>$6,500 ($4,500)</td>
<td>$10,500 ($4,500)</td>
</tr>
<tr>
<td>3rd- and 4th-year</td>
<td>$7,500 ($5,500)</td>
<td>$12,500 ($5,500)</td>
</tr>
<tr>
<td>Aggregate</td>
<td>$31,000 ($23,000)</td>
<td>$57,500 ($23,000)</td>
</tr>
</tbody>
</table>

\(^*\) $20,500 ($8,500) for each year

\(^1\) First-year undergraduate students only

\(^2\) Undergraduate and graduate students

\(^3\) Not including Stafford Subsidized Loan Option

\(^4\) Not including Stafford Subsidized Loan Option

\(^5\) Not including Stafford Subsidized Loan Option
Except those whose parents are unable to borrow a PLUS loan

These limits also apply to dependent students whose parents are unable to borrow a PLUS loan

The numbers in parentheses represent the maximum amount that may be subsidized

Graduate and professional students are not eligible to receive Direct Subsidized Loans for loan periods beginning on or after July 1, 2012

The aggregate amounts for graduate students include loans for undergraduate study. The aggregate limits include both Direct Subsidized and Unsubsidized Loans and any subsidized and unsubsidized Stafford Loans received through the Federal Family Education Loan (FFEL) Program

Interest Rates as determined by Congress

<table>
<thead>
<tr>
<th>Borrower</th>
<th>Loan Type</th>
<th>Date of First Disbursement</th>
<th>Fixed Interest Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate Students</td>
<td>Direct Subsidized and Unsubsidized Loans</td>
<td>7/1/13–6/30/14</td>
<td>3.86%</td>
</tr>
<tr>
<td></td>
<td>Direct Unsubsidized Loans</td>
<td>7/1/06–6/30/13</td>
<td>6.60%</td>
</tr>
<tr>
<td></td>
<td>Direct Subsidized Loans</td>
<td>7/1/11–6/30/13</td>
<td>3.40%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>7/1/10–6/30/11</td>
<td>4.50%</td>
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<tr>
<td></td>
<td></td>
<td>7/1/09–6/30/10</td>
<td>5.60%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>7/1/08–6/30/09</td>
<td>6.00%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>7/1/06–6/30/08</td>
<td>6.80%</td>
</tr>
<tr>
<td>Graduate and Professional Students</td>
<td>Direct Unsubsidized Loans</td>
<td>7/1/13–6/30/14</td>
<td>5.41%</td>
</tr>
<tr>
<td></td>
<td>Direct Subsidized Loans*</td>
<td>7/1/06–6/30/13</td>
<td>6.80%</td>
</tr>
<tr>
<td>Parents and Graduate and Professional Students</td>
<td>Direct PLUS Loans</td>
<td>7/1/13–6/30/14</td>
<td>6.41%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>7/1/06–6/30/13</td>
<td>7.90%</td>
</tr>
</tbody>
</table>

*Graduate and professional students are not eligible to receive Direct Subsidized Loans for loan periods beginning on or after July 1, 2012 based on the Budget Control Act of 2011.

Eligibility requirements for the Direct Subsidized/Unsubsidized Loan:

- You must be enrolled at least half-time in a degree-seeking program at a school that participates in the Direct Loan Program
- You must be a U.S. citizen or eligible non-citizen
- You must not be in default on any federal education loans or owe an overpayment on a federal education grant

To apply for the Direct Subsidized and/or Unsubsidized Loans:

- Go to [http://www.fafsa.ed.gov/](http://www.fafsa.ed.gov/) to complete the Free Application for Federal Student Aid (FAFSA) application online. Students must select the appropriate school code to avoid delays in the award process
- You must log on to MyUTH to accept the award offer when it has been made available
- Using the Department of Education-issued PIN, you must complete the Master Promissory Note (MPN) via [www.studentloans.gov](http://www.studentloans.gov). If you do not have a PIN, you may request one at [http://www.pin.ed.gov/PINWebApp/pinindex.jsp](http://www.pin.ed.gov/PINWebApp/pinindex.jsp)
- You must complete financial aid Entrance Counseling pertaining to Direct Loans via [www.studentloans.gov](http://www.studentloans.gov)

The University will use the information provided on the FAFSA to assess your financial need for student aid.
For more information regarding Federal Direct Loans visit www.studentaid.ed.gov

**ADDITIONAL FEDERAL LOANS**

**Federal Perkins Loan**
Perkins Loans are low-interest federal student loans for undergraduate, graduate and professional students with exceptional financial need. The school is the lender. Funds are awarded based on fund availability.

The interest rate for the Perkins Loan is 5%.

Perkins Loan disbursements are typically paid out evenly over the terms of your current enrollment period with the first disbursement occurring on or after September 1st.

This loan carries a 9 month grace period after you leave school, cease to be enrolled at least half-time or graduate.

Undergraduate students may borrow a total of $27,500 over the lifetime of the loan. Graduate students may borrow a total of $60,000, which includes amounts borrowed as an undergraduate.

**Eligibility requirements for the Federal Perkins Loan:**

- You must be enrolled at least half-time in a degree-seeking program at a school that participates in the Federal Perkins Loan Program
- You must be a U.S. citizen or eligible non-citizen
- You must demonstrate exceptional financial need
- You must not be in default on any federal education loans or owe an overpayment on a federal education grant

**To apply for the Federal Perkins Loan:**

The Perkins Loan will be offered as part of your award package pending the school’s determination of your eligibility and based on fund availability.

- You must log on to MyUTH to accept the award offer when it has been made available
- You must create a PIN on MyUTH. **This is not the FAFSA-issued PIN.** Log on to MyUTH, click “Student Services,” select “Self Service.” In the “Update Personal Information” section select “Address” link. Click on the “Security” tab and follow the instructions to create a PIN.
- You should complete and electronically sign the Perkins Master Promissory Note (PMPN). Log on to MyUTH, select “View Financial Aid,” find the link for “Sign Perkins MPN”. Use your newly created PIN to sign the Perkins MPN.
- You must complete Perkins Entrance Counseling via [http://mappingyourfuture.org/oslc/counseling/index.cfm?act=Intro&OslcTypeID=3](http://mappingyourfuture.org/oslc/counseling/index.cfm?act=Intro&OslcTypeID=3)
Direct (Parent) PLUS Loan - Dependent Students

Parent PLUS Loans are interest-bearing loans for the parents of dependent students who are enrolled at least half-time in a degree-seeking program at an eligible school. This loan assists with educational expenses up to the student’s cost of attendance minus all other assistance. You, the parent, are responsible for repaying the loan.

Currently, the interest rate for Parent PLUS Loans is a fixed rate of 6.41%. Interest is charged during all periods beginning on the date of the loan’s first disbursement.

Additionally, you pay a loan origination fee which is a percentage of the principal amount of each Parent PLUS Loan you receive.

Dependent students whose parent(s) have applied for but were unable to obtain a Parent PLUS Loan are generally eligible to receive additional Direct Unsubsidized Loan funds.

The Parent PLUS Loan will be evenly disbursed over the terms of the student’s enrollment for the current award period unless otherwise indicated.

The Parent PLUS Loan enters repayment once your loan is fully disbursed. You may contact your loan servicer to request a deferment

- while you or your child are enrolled at least half-time and
- for an additional six months after your child ceases to be enrolled at least half-time

If your loan is deferred, interest will accrue on the loan during the deferment. You may choose to pay the accrued interest or allow the interest to capitalize when the deferment period ends. Your loan servicer will notify you when your first payment is due.

Eligibility requirements for the Direct (Parent) PLUS Loan:

- The parent must be the student’s biological, adoptive or stepparent (if the parent has remarried at the time of application)
- Your dependent child must be enrolled at least half-time in a degree-seeking program at a school that participates in the Direct Loan Program
- Parent PLUS Loan borrowers cannot have an adverse credit history. A credit report will be obtained by the Department of Education. If you are found to have adverse credit history at the time of the credit check, you may still borrow a Direct (Parent) PLUS Loan with an approved endorser
- The parent and dependent children must be U.S. citizens or eligible non-citizens
- The parent must not be in default on any federal education loans or owe an overpayment on a federal education grant
To apply for the Direct (Parent) PLUS Loan:

- The parent must complete and submit to the school a Parent PLUS Loan Request http://www.uthouston.edu/sfs/financial-aid/forms.htm
- The Parent PLUS Loan borrower must complete the PLUS Application via www.studentloans.gov
- Using the Department of Education-issued PIN, the parent must complete the Master Promissory Note (MPN) via www.studentloans.gov. If you do not have a PIN, you may request one at http://www.pin.ed.gov/PINWebApp/pinindex.jsp
- The Parent PLUS Loan will be accepted on the student’s behalf by the Office of Student Financial Services on MyUTH upon receipt of all required documentation

Direct (Graduate) PLUS Loan - Graduate/Professional Students
Graduate PLUS Loans are interest-bearing loans for graduate/professional students enrolled at least half-time in a degree-seeking program at an eligible school. This loan assists with educational expenses up to your cost of attendance minus all other assistance. You, the student, are responsible for repaying the loan.

Currently, the interest rate for Graduate PLUS Loans is a fixed rate of 6.41%. Interest is charged during all periods beginning on the date of the loan’s first disbursement.

Additionally, you pay a loan origination fee which is a percentage of the principal amount of each Graduate PLUS Loan you receive.

The Graduate PLUS Loan will be evenly disbursed over the terms of your enrollment for the current award period unless otherwise indicated.

The Graduate PLUS Loan enters repayment once your loan is fully disbursed. Your loan will be placed into deferment while you are enrolled at least half-time and for an additional six months after you cease to be enrolled at least half-time. Your loan servicer will notify you when your first payment is due.

Eligibility requirements for the Graduate PLUS Loan:

- You must be enrolled at least half-time in a degree-seeking program at a school that participates in the Direct Loan Program
- Graduate PLUS Loan borrowers cannot have an adverse credit history. A credit report will be obtained by the Department of Education. If you are found to have adverse credit history at the time of the credit check, you may still borrow a Graduate PLUS Loan with an approved endorser
- You must be a U.S. citizen or eligible non-citizen
- You must not be in default on any federal education loans or owe an overpayment on a federal education grant
To apply for the Graduate PLUS Loan:

- You must complete and submit to the school a Graduate PLUS Loan Request at [http://www.uthouston.edu/sfs/financial-aid/forms.htm](http://www.uthouston.edu/sfs/financial-aid/forms.htm)
- The Graduate PLUS Loan borrower must complete the PLUS Application via [www.studentloans.gov](http://www.studentloans.gov)
- You must complete Entrance Loan Counseling via [www.studentloans.gov](http://www.studentloans.gov)
- Using your Department of Education-issued PIN, you must complete the Master Promissory Note (MPN) via [www.studentloans.gov](http://www.studentloans.gov). If you do not have a PIN, you may request one at [http://www.pin.ed.gov/PINWebApp/pinindex.jsp](http://www.pin.ed.gov/PINWebApp/pinindex.jsp)
- You must log on to MyUTH to accept the award offer when it has been made available

For more information regarding Direct (Parent) PLUS and Direct (Graduate) PLUS Loans visit [www.studentaid.ed.gov](http://www.studentaid.ed.gov)

**Health Profession Student Loan (HPSL)**

This loan program provides long term, low interest rate loans to full-time students enrolled in the Doctor of Dental Surgery (DDS) program. The interest rate is 5% and begins to accrue following a one-year grace period after you cease to be a full-time student. When compared to other federal student loans and private loans, the Health Professions Student Loan provides a significant savings. The loan also offers deferment of principal and interest while the Borrower: (a) serves on active duty as a member of a uniformed service of the United States, for up to three years; (b) serves as a volunteer under the Peace Corps Act, for up to three years; (c) pursues advanced professional training, including internships and residencies; (d) pursues a full-time course of study at a health professions school eligible for participation in the Health Professions Student Loan program; (e) leaves the Institution, with the intent to return to the Institution as a full-time student, to engage in a full-time educational activity which is directly related to the health profession for which the Borrower is preparing, as determined by the Secretary of Health and Human Services (the Secretary), for up to two years; and (f) participates in a fellowship training program or a full-time educational activity which is directly related to the health profession for which the Borrower prepared at the institution, and is engaged in by the Borrower within 12 months after completion of the Borrower’s participation in advanced professional training described in (c) above or prior to the completion of the borrower’s participation in such training, for up to two years.

**Eligibility requirements for the Health Professions Loan:**

- You must be enrolled as a full-time student in a degree program leading to a Doctor of Dental Surgery (DDS)
- You must be a citizen, national, or a lawful permanent resident of the United States or the District of Columbia, the Commonwealths of Puerto Rico or the Marianas Islands, the Virgin Islands, Guam, the American Samoa, the Trust Territory of the Pacific Islands, the Republic of Palau, the Republic of the Marshall Islands and the Federated State of Micronesia
- You must demonstrate financial need
- You must not owe a federal grant refund or be in default on any federal loan
- You must maintain good academic standing
- You must register with Selective Service if required by law
• You must provide your parent’s personal data and 2012 tax information on your FAFSA and submit it to FAFSA for processing

Required documents for the HPSL:

• Parent Income & Resource Certification
  http://www.uthouston.edu/dotAsset/d52ff504-2fcd-41c1-8ade-430c4ec18504.pdf
• Previous Institution Information Form
  http://www.uthouston.edu/dotAsset/59b9ae3e-7e0d-4901-8ab9-b9c1d5a66e78.pdf
• You must provide your parent’s personal data and 2012 tax information on your FAFSA. Due to federal guidelines, this office no longer accepts copies of tax returns. Therefore you may provide the required tax information to our office by selecting ONE of the options below:

  OPTION 1: (Preferred Method)
  Use the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web. Please go to http://FAFSA.gov to use the IRS DRT.

  OPTION 2:
  Provide our office with your parent’s 2012 IRS Tax Return Transcript. To obtain an IRS Tax Transcript, go to www.irs.gov and click on "Order a Return Transcript or Account Transcript" link, or call 1-800-908-9946. This process may take up to 4 weeks for processing

Loans for Disadvantaged Students (LDS)
The LDS program is a federal loan award made available by the Department of Health and Human Services. This loan program provides long term, low interest rate loans to full-time, financially needy students from disadvantaged backgrounds enrolled in the Doctor of Medicine (MD) or Doctor of Dental Surgery (DDS) program. The interest rate is 5% and begins to accrue following a one-year grace period after you cease to be a full-time student. When compared to other federal student loans and private loans, the Loans for Disadvantaged Students provide a significant savings. The loan also offers deferment of principal and interest while the Borrower: (a) serves on active duty as a member of a uniformed service of the United States, for up to three years; (b) serves as a volunteer under the Peace Corps Act, for up to three years; (c) pursues advanced professional training, including internships and residencies; (d) pursues a full-time course of study at a health professions school eligible for participation in the Health Professions Student Loan program; (e) leaves the Institution, with the intent to return to the Institution as a full-time student, to engage in a full-time educational activity which is directly related to the health profession for which the Borrower is preparing, as determined by the Secretary of Health and Human Services (the Secretary), for up to two years; and (f) participates in a fellowship training program or a full-time educational activity which is directly related to the health profession for which the Borrower prepared at the institution, and is engaged in by the Borrower within 12 months after completion of the Borrower’s participation in advanced professional training described in (c) above or prior to the completion of the borrower’s participation in such training, for up to two years.

Disadvantaged Student Guidelines:
Required documents for the LDS:

- Parent Income & Resource Certification
  [http://www.uthouston.edu/dotAsset/d52ff504-2fcd-41c1-8ade-430c4ee18504.pdf](http://www.uthouston.edu/dotAsset/d52ff504-2fcd-41c1-8ade-430c4ee18504.pdf)
- Previous Institution Information Form
  [http://www.uthouston.edu/dotAsset/59b9ae3e-7e0d-4901-8ab9-b9c1d5a66e78.pdf](http://www.uthouston.edu/dotAsset/59b9ae3e-7e0d-4901-8ab9-b9c1d5a66e78.pdf)
- You must provide your parent’s personal data and 2012 tax information on your FAFSA. Due to federal guidelines, this office no longer accepts copies of tax returns. Therefore you may provide the required tax information to our office by selecting ONE of the options below:

**OPTION 1: (Preferred Method)**
Use the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web. Please go to [http://FAFSA.gov](http://FAFSA.gov) to use the IRS DRT

**OPTION 2:**
Provide our office with your parent’s 2012 IRS Tax Return Transcript. To obtain an IRS Tax Transcript, go to [www.irs.gov](http://www.irs.gov) and click on “Order a Return Transcript or Account Transcript” link, or call 1-800-908-9946. This process may take up to 4 weeks for processing

The Office of Student Financial Services is responsible for making reasonable determinations of need and providing loan awards. For more information regarding these loan programs, please call the Office of Student Financial Services at (713) 500-3860.

**DIRECT LOAN MASTER PROMISSORY NOTE (MPN)**

Direct Loan Master Promissory Note (MPN)
UT Health and UTMDACC School of Health Professions participate in the William D. Ford Federal Direct Loan Program (DL). Direct loans help meet a student’s cost of going to school. **Borrowing a student loan is optional.** All borrowers who anticipate borrowing a federal student loan are required to complete the Master Promissory Note specific to Direct Loans. This [MPN](https://studentloans.gov) is available through online services provided by the Department of Education [https://studentloans.gov](https://studentloans.gov)

Note: Continuing financial aid recipients who previously completed the MPN specific to Direct Loans for either institution within the last 10 years are not required to complete the MPN again unless requested by the Office of Student Financial Services.

**ENTRANCE INTERVIEW/COUNSELING (Required)**

First time financial aid recipients at UTHealth and UTMDACC School of Health Professions who receive the Subsidized Stafford and/or Unsubsidized Stafford Loans must complete financial aid Entrance Counseling pertaining to Direct Loans. **Entrance**
Counseling for Direct Loans is available through online services provided by the Department of Education:  https://studentloans.gov

Continuing financial aid recipients (received aid at UTHealth or UTMDACC) are NOT REQUIRED to complete entrance counseling each year after the initial forms have been completed unless requested by the Office of Student Financial Services.

Parent PLUS and Graduate PLUS borrowers must follow the instructions provided with the loan request when applying for these types of loans.

If you are receiving funds from the Department of Health and Human Services (DHHS) you must also complete the Entrance Counseling for your specific DHHS loan. These types of loans include: Health Professions Student Loan (HPSL), Loans for Disadvantaged Students (LDS), and Nursing Student Loans (NSL). Entrance Counseling for DHHS loans is available through the University’s website http://www.uthouston.edu/sfs/financial-aid/entrance-counseling.htm

THE VERIFICATION PROCESS

In general, students selected for verification by the Department of Education are required to submit documentation to support information reported on the FAFSA. All documents required for verification must be submitted to Student Financial Services at UTHealth and not the Department of Education (DOE).

Documents received will be checked against the student’s FAFSA application data within 30 days once the official review process has begun. If corrections are needed, the school will make the corrections and/or necessary updates. Students will receive a correction notice (paper or electronic SAR) from DOE. The updated information will be processed within 14 working days once the school receives the corrections from DOE (approximately 3-5 working days)

Students may submit requested verification documents up to 30 days prior to their last day of enrollment for the award year. A student failing to submit requested documents 30 days prior to the last day of enrollment for the award year will have the processing of their application terminated.

Once processing begins for the 2013-2014 Award Year, students selected for verification will receive an email with instructions specifying the documents required for submission to the school. The documents must be completed in a timely manner to avoid processing delays.

Student Financial Services will accept the following documents as support of the federal items selected for verification:

Verification of Income (Selected Applicants ONLY)

Tax Filers
IRS Data Retrieval Tool (IRS DRT)
The best way to verify income is by using the IRS DRT that is part of FAFSA on the Web. If you have not already used the tool, go to FAFSA.gov, log in to your FAFSA record, select “Make FAFSA Corrections,” and navigate to the Financial Information section of the form. From there, follow the instructions to determine if you are eligible to use the IRS DRT to transfer 2012 IRS income tax information into your FAFSA. For
electronic filers, 2012 IRS income tax return information for the IRS DRT is typically available within 2-3 weeks after the 2012 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2012 paper IRS income tax returns, the 2012 IRS income tax return information is available for the IRS DRT within 8-11 weeks after the 2012 paper IRS income tax return has been received by the IRS.

-OR-

2012 IRS Tax Return Transcript (Selected Applicants ONLY)

Please note that photocopies of the income tax return are no longer acceptable documents. To obtain a tax transcript for you or your parent, please visit www.IRS.gov and click on the “Order a Return or Account Transcript” link, or call 1-800-908-9946.

Non-Tax Filers

All non-tax filers must provide W-2’s to confirm income earned from work.

Documents may be mailed or faxed to Student Financial Services. It is the student’s responsibility to verify receipt of documents by Student Financial Services.

Mailing Address: UT Health
Student Financial Services
P.O. Box 20036
Houston, TX 77225

Phone: (713) 500-3860
Fax: (713) 500-3863

⚠️ Please be aware of the risks associated with sending confidential information via electronic transmission.

ADDITIONAL APPLICATION REQUIREMENTS

While processing your FAFSA additional application requirements may be requested by the Office of Student Financial Services to complete your file. You may be notified via mail/email that your file is incomplete. Listed below are a few documents that may be requested for financial aid purposes:

Proof of Citizenship/Eligible Non-Citizenship Status

For those students whose citizenship/eligible non-citizenship status cannot be confirmed by the Department of Homeland Security and Social Security Office please provide a readable photocopy of either your Birth Certificate or valid U.S. passport including any endorsement pages. Permanent Residents may present a legible photocopy of your Permanent Resident card (front and back) with official Alien Registration number. You may also present your Certificate of Naturalization/Citizenship (clear photocopy) in lieu of a Permanent Resident card. Older versions of the Certificate of Naturalization and of the Certificate of Citizenship instruct the holder not to photocopy them. The USCIS has advised the Department that these documents (and others) may be photocopied if done for lawful purposes (such as documenting eligibility for FSA funds). Source: FSA HB JUL 2010 vol. 1 chap. 2 pg. 1-21

Selective Service Registration

The Selective Service may have reported that you have not registered with them. If you are female or were born before 1960, registration is not required. Otherwise, if you are not yet registered, are male and are 18 through 25 years of age, to receive aid you must complete a Selective Service registration form either online, via your FAFSA or your local post office. If you are registered and need proof, you may visit www.sss.gov and print a Selective Service Online Registration Verification form or contact Selective Service at 847-688-6888 for a Status Information Letter.
Social Security Card
The Social Security Administration may be unable to confirm the Social Security number (SSN) reported on your FAFSA for you or your parent(s). In those cases, you must provide a photocopy of you/your parent(s) signed Social Security card. If you do not have the original of your Social Security card please contact your local Social Security office to request a duplicate copy. For more information on replacing lost or stolen social security cards please call 1-800-772-1213 or visit www.ssa.gov.

Department of Health and Human Services Funds (DHHS)
Independent students who provide parental information on their FAFSA for DHHS fund consideration must also provide a photocopy of their parent(s)’ signed federal tax return transcript and their W-2 form(s).

NOTIFICATION OF AWARDS

The award notice is an important source of information as it details the sources of aid, the amounts, and the scheduled disbursements offered to you. Student Financial Services will distribute student award notifications upon receipt and completion of the FAFSA information and any required verification documents. Students should review their awards and accept/decline/reduce the financial aid offered via MyUTH.

RECEIVING FINANCIAL AID

If you are receiving funds administered by UTHealth or UTMDACC (e.g., Direct Loans, Perkins), they will first be applied against any charges that are currently due on your account (tuition/fees). Financial aid received from outside sources (e.g., outside scholarships, alternative loans) may need to be endorsed (if received as a paper check) to pay any charges that are currently due. If funds are received from outside providers via electronic funds transfer (EFT), they will be directly applied against your student account. No endorsement will be required.

After your financial aid has been applied to what is currently due on your account (tuition/fees) and funds remain, you have the option of depositing your refund directly into your personal checking/savings account or receive a paper check via mail. You may enroll in Direct Deposit by logging on to MyUTH. It is important to keep your local address current on MyUTH if you choose to have your refund mailed.

Medical (MD) and Dental (DDS) Students: If you will be using the installment plan to pay tuition and fees, it is important that you request the payment plan through the Bursar’s Office or log on to MyUTH prior to disbursement of your funds. This will ensure that your funds are applied to charges that are currently due rather than the full amount of your tuition and fees. For more information on the installment plan, contact the Bursar’s office at (713) 500-3088.